

Campbelltown Destination Management Plan

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Prepared for Campbelltown City Council

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1. Executive Summary

1.1. Introduction

Stafford Strategy (Stafford) was commissioned by Campbelltown City Council (Council) to develop a destination management plan (DMP) for Campbelltown. The purpose of the DMP is to identify opportunities to sustainably grow Campbelltown's visitor economy and to assist in positioning Campbelltown as the capital of Sydney's south west and the economic, lifestyle and cultural hub for the greater Macarthur region.

Rather than just focusing on traditional leisure-based tourism, this DMP focuses on the holistic visitor economy which includes leisure tourism as well as a variety of other "non-traditional" tourism sectors such as medical tourism, education tourism, sports tourism, wellness tourism, legal tourism and events and conferences etc.

At the request of Council, a specific focus for this DMP is on the Campbelltown central business district (CBD), which covers a precinct from Leumeah in the north to Macarthur Square and Station in the south.

The DMP aligns with projects Council is currently working on/has recently completed such as:

- the Re-imagining Campbelltown CBD project (the CBD's vision);
- the Campbelltown Health and Education Precinct (HEP) vision and strategy;
- Campbelltown 2027 (Campbelltown's Community Strategy Plan); and the Campbelltown Night Time Economy Strategy (which is currently being developed);
- the Macarthur South West A-League bid;
- the Masterplan for Campbelltown Arts Centre and Cultural Precinct;
- redevelopment plans regarding Campbelltown Stadium and the surrounding precinct; and
- outcomes from the Western Sydney City Deal.

1.2. Campbelltown's visitor economy

Figure 1 provides a graphical summary of Campbelltown's visitor economy and demonstrates that:

- visitation has remained relatively static over the past few years, with only a minor increase in visitation accruing of 2% (17k visitors);
- over three-quarters of visitors (76%) are domestic day trippers; while this is an important sector, visitor spend data demonstrates that the domestic and international overnight visitor markets are far higher yielding and, while only representing 24% of total visitors to Campbelltown, generate 75% of all spend; and
- Campbelltown currently ranks fourth in terms of total visitation when compared with eight other LGAs in Western Sydney – the opportunity exists to grow Campbelltown's market share by leveraging off unique points of difference the LGA has and capitalising on non-traditional forms of tourism (such as medical and sports tourism).

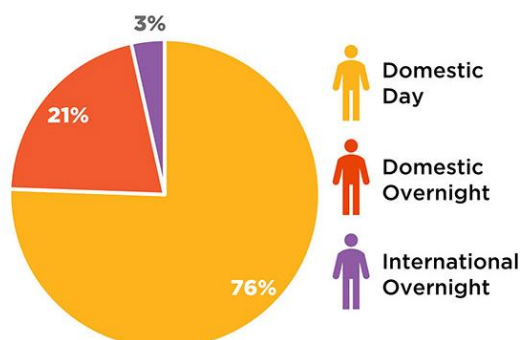
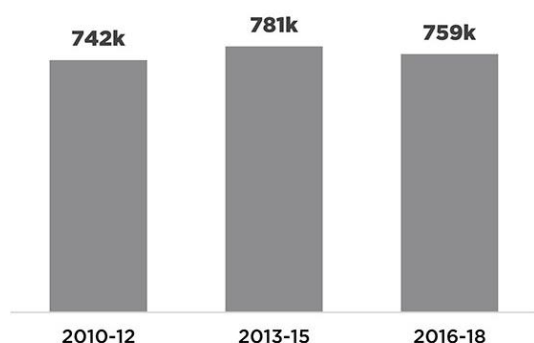
This DMP, therefore, deliberately focuses on initiatives to increase overnight visitation to Campbelltown and to grow the average length of stay as these will deliver far higher economic benefits (including local jobs and investment) than focusing on initiatives to drive the day tripper market.

Figure 1: Campbelltown's visitor economy¹

OUR VISITOR ECONOMY

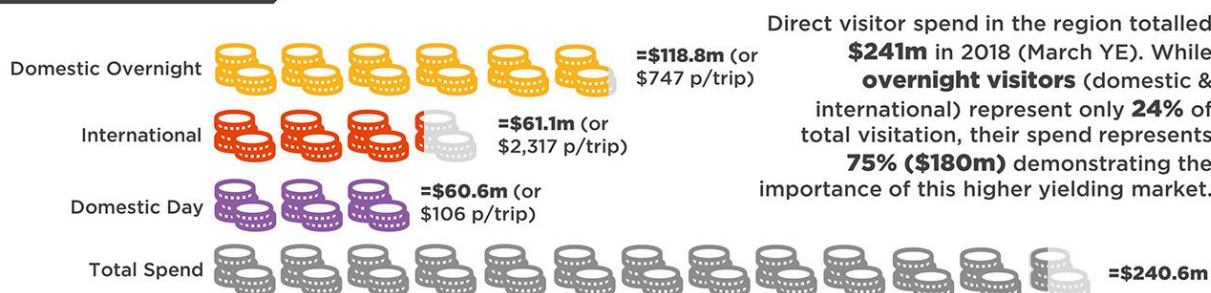
VISITOR NUMBERS & TYPE

In 2018, Campbelltown received 759k visitors, up **17k (2%)** from 2012. **82% (625k)** of visitors visit the CBD precinct.



The majority of visitors are **domestic day trippers**, representing **76%** of all visitation. (based on three year average from 2016-18)

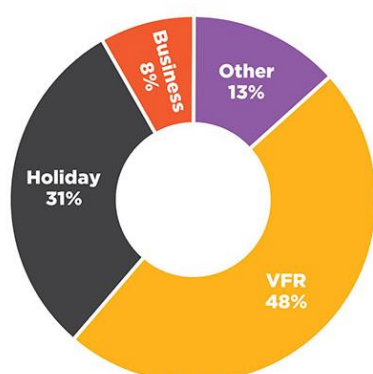
VISITOR SPEND



Direct visitor spend in the region totalled **\$241m** in 2018 (March YE). While **overnight visitors** (domestic & international) represent only **24%** of total visitation, their spend represents **75% (\$180m)** demonstrating the importance of this higher yielding market.

WHY VISITORS COME & HOW MANY JOBS ARE GENERATED

The majority of visitation to Campbelltown is leisure-based travel (VFR and holiday) comprising **79%** of visitation.

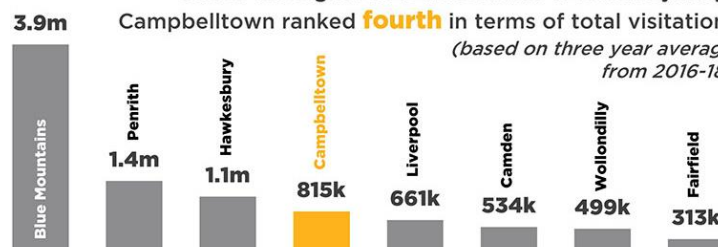


In 2017, the visitor economy generated **2,244** jobs (75% of which were full time) and produced **\$620m** in economic output and value added.



COMPARISON WITH WESTERN SYDNEY

Out of the eight LGAs assessed in Western Sydney, Campbelltown ranked **fourth** in terms of total visitation. (based on three year average from 2016-18)



¹ Visitor numbers: National and International Visitor Survey, Tourism Research Australia (TRA). Based on March YE data and three-year averages from: March 2010 to March 2012; March 2013 to March 2015; March 2016 to March 2018. Three-year averages have been utilised to align with the methodology applied by TRA.

Visitor Type: National and International Visitor Survey, TRA. Based on March YE data and three-year average from March 2016 to March 2018.

Visitor Spend: Spend per visitor data is based on Sydney Region data provided by DNSW (as no spend data is available for individual LGAs in this region - <https://www.destinationnsw.com.au/wp-content/uploads/2018/06/travel-to-sydney-snapshot-march-2018.pdf>) and applied to three-year average visitation data to Campbelltown from March 2016 to March 2018.

Why visitors come & comparison with Western Sydney LGAs: National and International Visitor Survey, TRA. Based on three-year average from March 2016 to March 2018. How many jobs are created: 2017 financial year data is the most recent data made available through Economy ID. Note percentages have been rounded to the nearest whole number: <https://economy.id.com.au/Campbelltown/tourism-value?BMID=20&Tourismtype=2>

1.3. The vision

To guide the development of Campbelltown as a destination and to strengthen its visitor economy, it is essential that a destination vision is created which industry buys into and supports. The destination vision proposed is outlined in Figure 2 below, along with six goals to achieve the vision. These goals also align with Campbelltown's Community Strategic Plan and this alignment has been demonstrated.

The destination vision is deliberately broad at this stage. As Campbelltown develops additional tourism product and destination branding collateral, the vision should be able to be refined and more tightly focused.

Figure 2: Our destination vision

OUR DESTINATION VISION

By 2025, Campbelltown will double visitor spend through significantly growing overnight visitation, introducing a strong destination event program, and actively encouraging tourism investment into new products.

GOAL 1



Activate our CBD precinct

Ensuring our CBD is a vibrant destination for locals and visitors to enjoy during the day and evening.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).

GOAL 2



Expand & diversify our accommodation & product mix

To continue to attract visitors to our area, we need to introduce new and interesting things to do and places to stay.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 3



Leverage off our strengths & niches

In an increasingly competitive environment, we need to leverage off our strengths and niches (medical, health, sport, legal, arts and culture etc.), rather than competing for market share.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 2 (A respected and protected natural environment), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).

GOAL 4



Grow our destination events program

Events are an important part of our visitor economy. We want to ensure we have a diverse and coordinated calendar of events, including signature destination events.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 5



Stronger destination profiling of our area

To be competitive, we need to align with trends and new technology for marketing our area as a desirable place to visit, live, work and invest.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 6



Achieve stronger support & coordination for tourism

It is important we work together (Council and industry) to achieve stronger coordination, partnerships and to activate new investment.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).

1.4. Barriers to growth

Figure 3 provides a summary of the challenges which were identified through consultation and analysis. These will impact Campbelltown's ability to sustainably grow its visitor economy if they are not adequately addressed. They range from product development gaps and supporting infrastructure barriers to those associated with governance within the visitor economy.

Importantly, to resolve or mitigate these barriers/challenges requires a collaborative approach between Council as well as industry. Many of the opportunities included in this DMP have been identified as potential solutions to these challenges.

Figure 3: Barriers to growing our visitor economy

Product & Supporting Infrastructure

- Lack of signage (interpretive and wayfinding) to major attractions and experiences as well as at gateway sites and sites of significance
- Lack of events calendar focused on destination events rather than all community events
- Lack of tourism investment into the LGA
- Limited commissionable tourism product available to encourage longer length of stay and yield
- Limited diversity of accommodation offer
- Limited evening activities/night time economy (NTE)
- Limited higher-quality dining options to encourage locals to dine within the LGA and people to visit the LGA for food experiences
- Limited room stock as current accommodation providers have high occupancy rates
- Stadium infrastructure constraints
- Limited visibility of indigenous significance of Campbelltown
- No signature destination event which can be profiled by DNSW

Marketing & Destination Awareness

- Digital-savviness of some operators is limited
- Limited host community awareness of the growth potential of the visitor economy
- Perception of Campbelltown
- Limited product packaging currently being undertaken
- Perception of Campbelltown as a day trip destination only
- Strong competition from destinations such as Sydney and surrounding areas
- The tyranny of distance (proximity to Sydney CBD is an advantage but also a challenge when trying to position Campbelltown as an overnight destination)
- The destination guide for Campbelltown needs to be distributed in a format which is easy to update

Planning & Activation

- Activating Re-imagining Campbelltown CBD requires major investment
- The approval process for events is considered challenging
- Balancing housing needs against tourism needs
- Challenges in activating waterways and natural areas
- Council and State Government planning instruments and support for tourism could be improved
- Event precinct site limitations
- Oversupply of retail space
- Queen Street activation requires major investment

Governance & Industry Collaboration

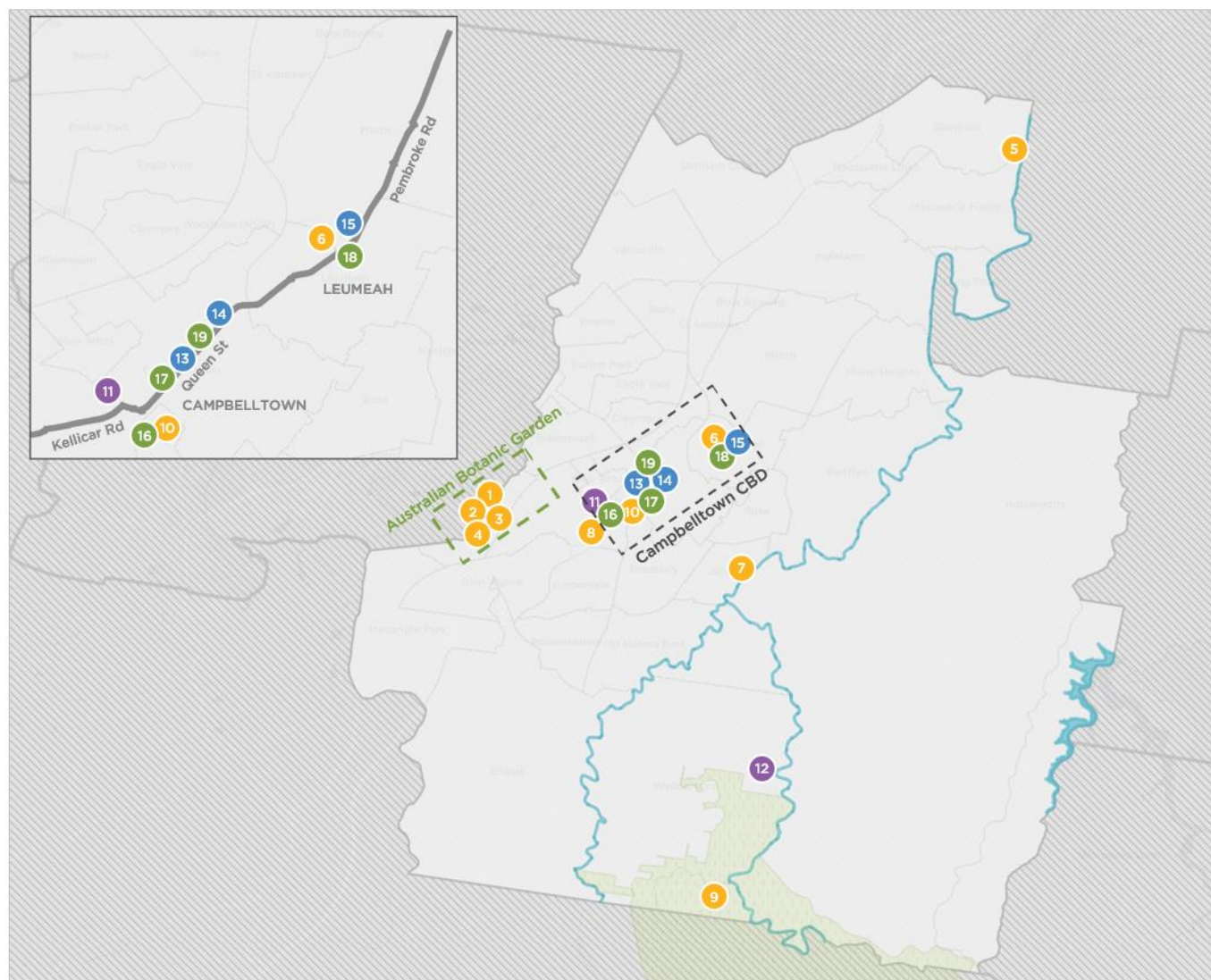
- Campbelltown is not included in a Destination Network
- Lack of industry cohesion
- Campbelltown has a few larger tourism industry operators but the majority are smaller operators
- Lack of major destination bodies and collaborative approaches

1.5. Recommended activations

To activate Campbelltown's destination vision will require support for a number of opportunities. These have been developed through input and ideas received from numerous stakeholders during the consultation for this DMP. Their ideas and suggestions have been evaluated and crystallised in light of the various barriers identified for Campbelltown. Figure 4 provides a summary of the opportunities identified.

The opportunities identified are primarily clustered around the CBD precinct (extending from Macarthur to Leumeah), supporting Council's desire to position Campbelltown as a true metropolitan city. Campbelltown's strength as a destination primarily lies in this CBD precinct as this is where the vast majority of tourism-related experiences and infrastructure is situated. If the heart of Campbelltown is pumping (i.e. the CBD), the economic benefits will flow throughout the rest of the LGA.

Figure 4: Summary of recommended activations

**ACTIVATION AREA KEY**

- Product and infrastructure development
- Accommodation

- Events
- Destination marketing

- Place activation
- Governance and industry collaboration

LOCATION-SPECIFIC OPPORTUNITIES

- 1 Southern access to the Garden
- 2 Large public event site
- 3 Major eco-adventure experience
- 4 Light show in the Garden
- 5 George's River Recreation Trail
- 6 Haunted/horror attraction
- 7 Indigenous cultural hub
- 8 Medical and wellness tourism
- 9 National park experiences
- 10 Art bike trails
- 11 New branded accommodation property
- 12 Destination holiday park
- 13 Civic events space with pop-up programming
- 14 Queen Street Music festival

- 15 Regional sporting events hub
- 16 Activating the Campbelltown Arts Centre
- 17 Activating Queen Street
- 18 Leumeah Sports and Entertainment Precinct
- 19 Multi-jurisdictional justice precinct

**ACROSS LGA OPPORTUNITIES
(OR LOCATION TBD)**

- 20 Interpretive and directional signage
- 21 Health and wellness retreat
- 22 Investment memorandum
- 23 Zoning for tourism
- 24 Destination event strategy
- 25 Event tool kit

- 26 ATDW awareness program
- 27 Community pride campaign
- 28 Destination brand for Campbelltown
- 29 Destination website for Campbelltown
- 30 Packaging of product
- 31 Visitor economy community awareness campaign
- 32 Visitor information services strategy
- 33 Advisory group for tourism (TAG)
- 34 Business development programs and upskilling
- 35 Industry networking sessions

1.6. The catalyst projects

The priority catalyst projects (Table 1)² are provided to help create a strong focus and prioritisation of tasks. They are also noted as projects which can act as the catalyst to help stimulate other projects to be activated as well. These game changer projects are noted as the following.

- A larger, branded accommodation property offering 120+ rooms situated within the CBD precinct.
- Continuing to develop Leumeah as a sports and entertainment precinct:
 - offering a range of activities to activate the precinct even when sporting events are not held;
 - to increase national/international visitation and events; and
 - to provide overnight stay opportunities within the precinct.
- A multi-jurisdictional justice precinct to capitalise on a significant gap and the flow-on economic benefits able to be generated from this niche tourism market.
- A high-quality destination holiday park leveraging off Campbelltown's strategic position in South West Sydney and on major transport corridors.
- A major eco-adventure experience in the Australian Botanic Garden such as a luge experience, an aerial experience (which could incorporate a number of zip lines) or a number of other experiences.
- An investment memorandum to profile these catalyst opportunities (as well as other potential opportunities) to potential investors so the investment and development community nationwide is better informed of what Campbelltown has to offer.

These projects are referred to as "game changers" because of their potential to have a major impact on Campbelltown's visitor economy through: increased visitor yield, growing the visitor average length of stay, shifting visitation from day trips to overnight and the generation of new investment into Campbelltown. They are also well aligned with Campbelltown's aspiration to be the major metropolitan hub of South West Sydney.

Table 1: The priority projects and alignment with DMP goals

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Leumeah Sports and Entertainment Precinct ³	✓	✓	✓	✓	✓	✓
New branded accommodation property	✓	✓		✓	✓	✓
Multi-jurisdictional justice precinct on Queen Street	✓		✓			
High-quality destination holiday park		✓			✓	
Major eco-adventure activity		✓	✓	✓	✓	
Investment memorandum						✓

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

³ This includes the development of the residential component of Leumeah to act as a population anchor and increase the vibrancy of the precinct.

1.7. Summary

Campbelltown is strategically situated within the Western Sydney region, which is set for significant population and economic growth. As a result, government at all levels is investing significantly in the LGA's transport, education, medical and other facilities and infrastructure.

While Campbelltown has traditionally been viewed as a day trip destination and has primarily attracted a strong VFR (visiting friends and relatives) market, the investment flowing into the LGA presents a number of unique opportunities to leverage to grow Campbelltown's visitor economy.

There are many significant and large-scale projects proposed for Campbelltown, ranging from the major expansion of hospital and health sector facilities, to strong growth in education (university and TAFE) sector demand and continuing strong growth in sporting activity and events.

What Campbelltown lacks is sufficient commissionable tourism product, and well-developed precinct venues to encourage stronger visitation and events.

This DMP offers the drivers to boost the visitor economy and to leverage off the major investment and related sectoral areas which Council is pushing for. Most of these are located within the Campbelltown CBD which will then allow for benefits to leak into other parts of the LGA. Making sure Campbelltown's CBD precincts are activated and driving visitor demand is a key outcome in the short to medium term.



2. Context

2.1. The approach for completing the DMP

The development of the DMP has involved the following:

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

2.2. Definitions

For clarity, the following provides an explanation of the terms: visitor, the visitor economy and a DMP.

WHO IS A VISITOR?

For the purpose of this DMP, a visitor includes all those travelling to Campbelltown, either for a day trip or staying overnight, for a variety of reasons, including for: leisure/holiday purposes; events (including sports, cultural and arts events and conferences); business-based travel; to visit friends and relatives (VFR); educational purposes; employment purposes; and for medical and health purposes.

WHAT IS THE VISITOR ECONOMY?

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

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

WHAT IS A DMP?

Destination management is about planning for sustainably managing and building the visitor economy. Unlike traditional tourism strategies which tend to be focused on marketing, a destination management plan is much broader and focuses on product development, planning requirements, infrastructure, industry development as well as marketing.

Destination management is, therefore, far more holistic than destination marketing. Because of this, destination management does not happen in isolation; it involves a wide range of sectors, stakeholder groups and delivery partners — such as government agencies (local, state and federal), communities and business groups — often working collaboratively.

2.3. About Campbelltown

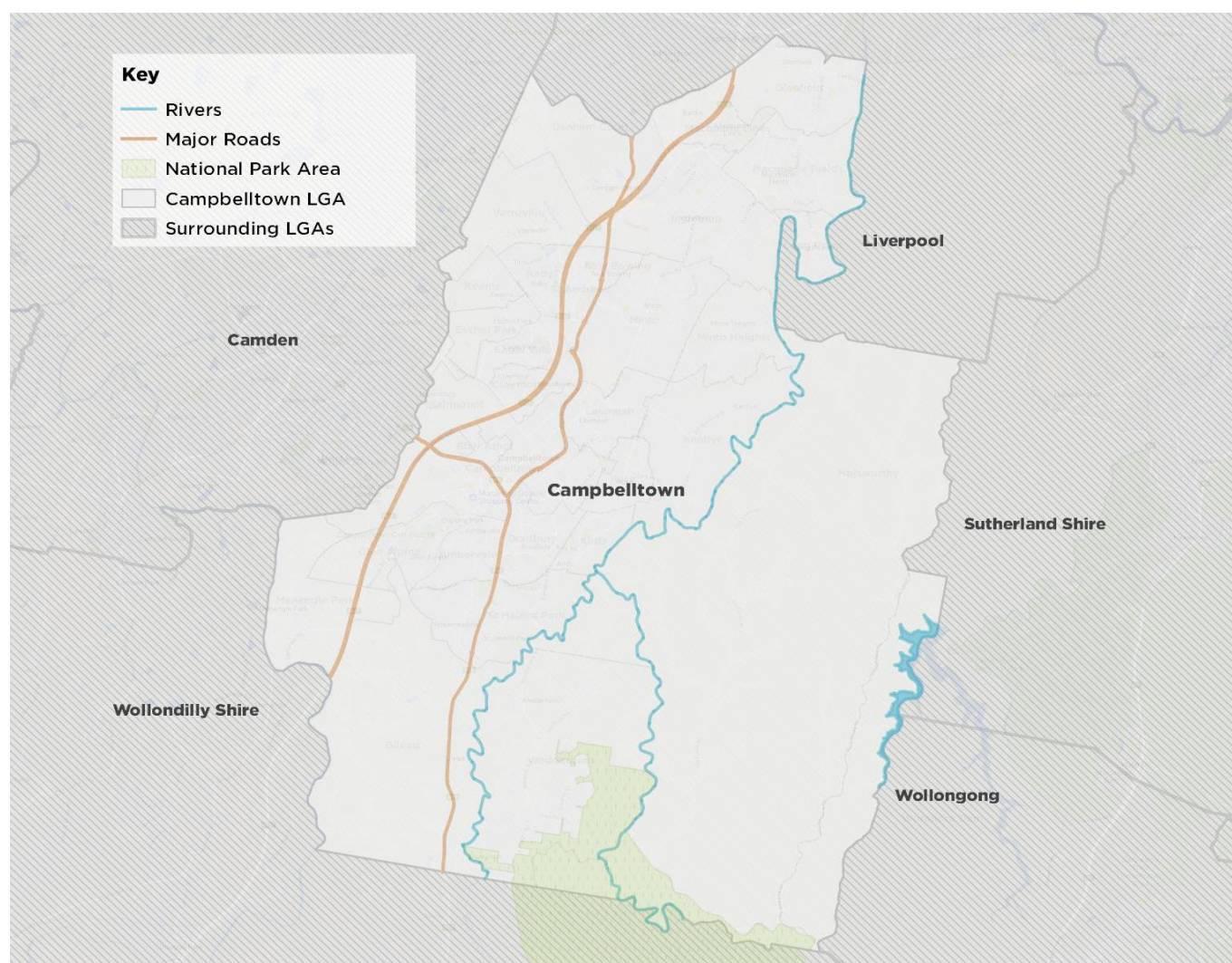
2.3.1. Location

Campbelltown LGA is situated in south west Sydney, just over 1 hours' drive from the Sydney CBD. It is the gateway to the Illawarra, Canberra and Southern Highlands regions from the Sydney CBD. The LGA covers 312 square kilometres and extends from Glenfield in the north, Menangle Park in the South, the Scenic Hills in the west and the Georges River in the east.

The LGA offers a wide range of cultural, educational, sporting and health facilities, including: the Campbelltown Arts Centre; the Western Sydney University's Campbelltown campus; two TAFE colleges; a wide variety of private and government schools; Campbelltown Stadium; and Campbelltown Public and Private Hospital.

Campbelltown is situated within one of two significant corridors of economic activity in Western Sydney – the 'north-south corridor' which runs from Campbelltown to Parramatta (with the other being the 'east-west corridor' which runs from Penrith to Parramatta). Given Campbelltown's strategic location within this corridor, its proximity to the future Western Sydney Airport and its rapidly growing population and economy, government at various levels has begun to invest in a variety of strategic infrastructure projects recognising its strategic location and high growth.

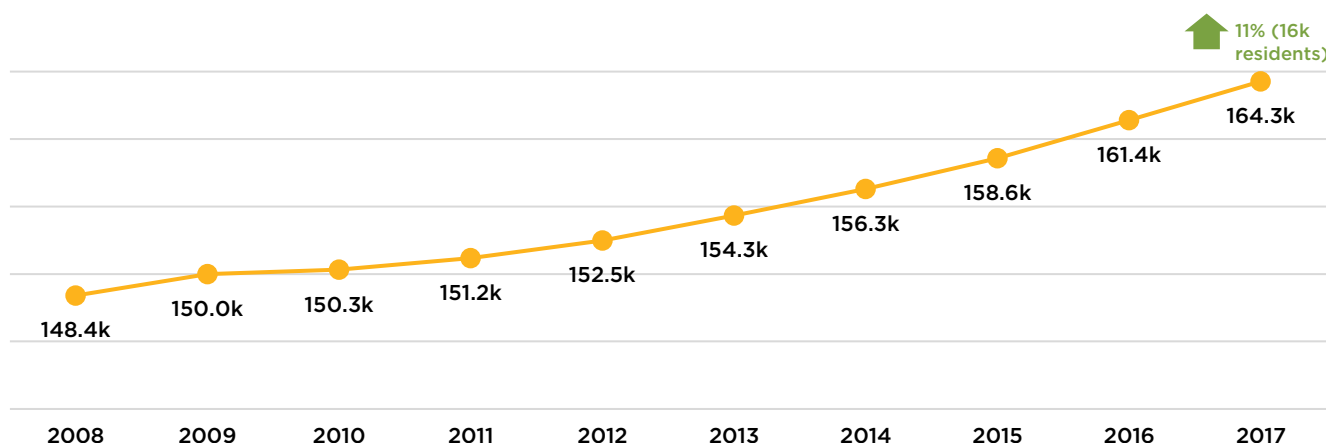
Figure 5: Map of the LGA



2.3.2. Population growth (historic and forecast)

Over the last 10 years, Campbelltown's population has grown by 11% (16k) residents – increasing from 148k residents in 2008 to 164k in 2017. Today, the city also serves a much wider resident catchment of more than 500k who utilise the city centre in particular for a wide range of services and facilities.

Figure 6: Campbelltown LGA historic population (2008-2017)⁴

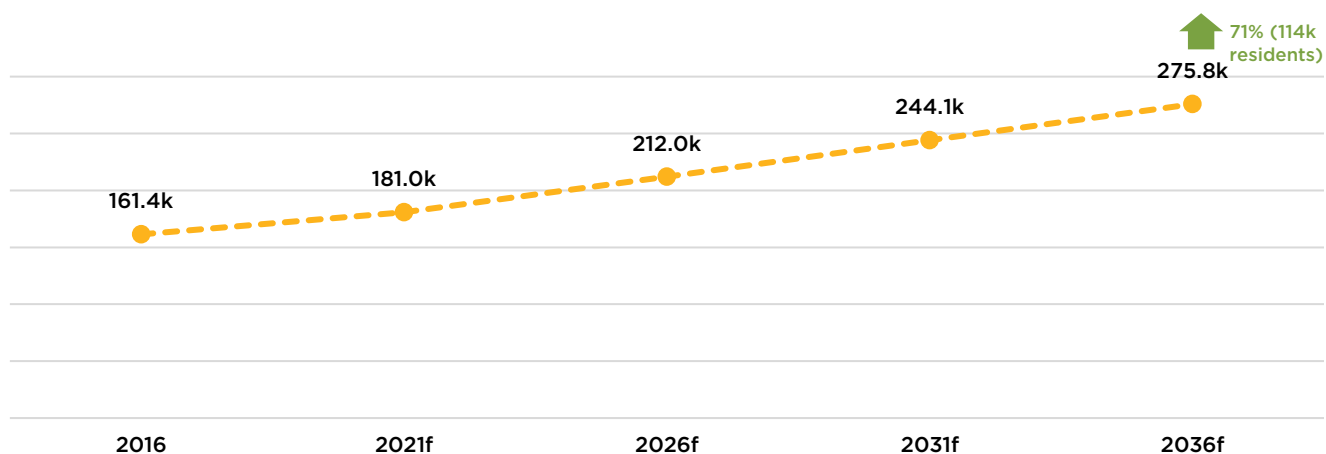


Campbelltown is forecast to experience strong population growth, with its resident population growing by 71% (114k residents) by 2036 (see Figure 7). This anticipated population growth is driven by catalysts such as:

- the Greater Macarthur Priority Growth Area and the Glenfield to Macarthur Urban Renewal Corridor, each of which is envisaged to attract large residential populations to Campbelltown;
- the establishment of the Western Sydney Airport in 2026; and
- other planned infrastructure investment.

By 2036, the broader regional population which Campbelltown services is anticipated to grow to 1.2m, an increase of 140% from 2016. This population growth is an important factor to consider in destination management planning because tourism-related product and infrastructure does not only service visitors, but rather caters to a local market, providing residents with things to do in their spare time and creating an environment where “skilled and talented ... workers will want to live and play”⁵.

Figure 7: Campbelltown LGA population forecasts (2016 – 2036)⁶



⁴ <https://profile.id.com.au/Campbelltown/population-estimate>

⁵ Campbelltown City Health and Education Precinct Strategic Vision 2017, Page 23

⁶ <https://forecast.id.com.au/Campbelltown/population-households-dwellings>

2.4. SWOT

The following provides a SWOT analysis for Campbelltown as a visitor destination.

Table 2: SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
<p>Location:</p> <ul style="list-style-type: none"> Strategic geographic location within Western Sydney and as the Gateway to the Illawarra, Canberra and Southern Highlands regions Proximity to Western Sydney Airport and to major generating markets <p>Infrastructure & Assets:</p> <ul style="list-style-type: none"> Accessibility by major rail and road networks which are also in the process of being upgraded Ageing stadium infrastructure Health and medical precinct (current and future development) Open space including the Georges River Nature Reserve, Dharawal National Park and other reserves/areas A wide range of sporting, health and education facilities and infrastructure Assets such as The Australian Botanic Garden and Campbelltown Arts Centre (which is recognised as a major regional gallery with a significant exhibition and performance program) Significant heritage sites and stories Major branded hotels including Rydges and Quest hotels The volume of land in Council ownership <p>Demographics:</p> <ul style="list-style-type: none"> Size of population base and forecast growth Multicultural community <p>Collaboration:</p> <ul style="list-style-type: none"> City Deal collaboration with other LGAs in greater Sydney 	<p>Infrastructure & product:</p> <ul style="list-style-type: none"> Lack of signage (interpretive and wayfinding) Lack of tourism investment Limited commissionable tourism product Limited room stock and diversity of accommodation Limited higher-quality dining options Limited evening activities/night time economy Limited visibility of indigenous significance of Campbelltown Oversupply of retail space Queen Street is not currently activated Ageing infrastructure <p>Perceptions & Marketing:</p> <ul style="list-style-type: none"> Perception of Campbelltown as a day trip destination only Perception of the City of Campbelltown Digital-savviness of operators Limited host community awareness of the growth potential of the visitor economy Limited product packaging Strong competition from destinations such as Sydney and surrounding areas Campbelltown is not included in a Destination Network Lack of industry cohesion A large number of small operators The tyranny of distance <p>Events:</p> <ul style="list-style-type: none"> Lack of major destination events calendar The approval process for events No signature destination event Event precinct site limitations 	<p>Infrastructure & product:</p> <ul style="list-style-type: none"> Activating the Australian Botanic Garden through an adventure experience, a light show, an outdoor amphitheatre and opening up southern access to the Garden from Campbelltown LGA Art bike trails George's River Recreation Trail Investment in ageing infrastructure (sport and entertainment infrastructure) Haunted/horror attraction Indigenous cultural hub Interpretive and directional signage Investment memorandum Medical and wellness tourism National park experiences Zoning for tourism <p>Accommodation:</p> <ul style="list-style-type: none"> Destination holiday park Health and wellness retreat Larger accommodation property <p>Events:</p> <ul style="list-style-type: none"> Civic events space with pop-up programming Destination event strategy Event toolkit and gateway Queen Street Music festival Regional sporting events hub <p>Destination Marketing:</p> <ul style="list-style-type: none"> ATDW awareness program Community pride campaign Destination brand for Campbelltown to align with the city branding work currently being developed Destination website for Campbelltown Packaging of product Visitor economy community awareness campaign 	<p>Economic factors:</p> <ul style="list-style-type: none"> Downturn in the economy – reducing disposable income used for travelling and day trips <p>Planning & Investment:</p> <ul style="list-style-type: none"> Delays in major State level infrastructure projects Lack of new private sector investment Lack of support from State Government to be recognised as a region or as offering a clear tourism proposition Urbanisation compromising rural/scenic feel to Campbelltown Nearby mature and rejuvenated destinations with greater marketing budgets Conflicting Council priorities <p>Competition:</p> <ul style="list-style-type: none"> Competition from other LGAs in greater Sydney Interstate and intrastate competition

Strengths	Weaknesses	Opportunities	Threats
	<ul style="list-style-type: none"> ▪ Lack of accommodation forcing visitors to stay elsewhere or chose alternative locations for hosting events/ conferences <p>Planning</p> <ul style="list-style-type: none"> ▪ Activating Re-imagining Campbelltown CBD ▪ Balancing housing and tourism needs ▪ Challenges in activating waterways and natural areas ▪ Council and State Government planning instruments and support for tourism 	<ul style="list-style-type: none"> ▪ Visitor information services strategy <p>Place Activation:</p> <ul style="list-style-type: none"> ▪ Activating the arts, cultural and heritage precinct ▪ Activating Queen Street through pop-ups, street lighting and art ▪ Entertainment and sporting precinct at Leumeah ▪ Multi-jurisdictional justice precinct <p>Governance & Industry Collaboration:</p> <ul style="list-style-type: none"> ▪ Advisory group for tourism (TAG) ▪ Business development programs and upskilling ▪ Industry networking sessions 	

2.5. The previous DMP's opportunities and activation status

Table 3 lists the previous actions that were included in the 2016 Macarthur DMP (which were relevant to Campbelltown or were regional opportunities) and summarises the status of each opportunity.

Table 3: Previous actions listed in the 2016 Macarthur DMP

■ Activated/ongoing work being completed | ■ Yet to be activated but still an opportunity | ■ No longer being pursued

Recommendation	Identified as Regional or Campbelltown-Specific Opportunity	Status
Tourism Product Development & Partnerships		
Sports and Entertainment Precinct	Campbelltown	Ongoing work being completed by Council on this project, including a bid for an A-League Football Team. Stadium upgrades and indoor sports arena.
Café/Restaurant and Entertainment Precinct	Campbelltown	Ongoing as part of Council's work around Leumeah. Also identified as an ongoing opportunity in this DMP.
Haunted Attraction and Festival	Campbelltown	Council commissioned a feasibility study on this project. The site assessment subsequently completed by Council identified that Council does not have any sites to go out to market with for this attraction. This DMP identifies that it is still an opportunity, but private property owners may need to be engaged.
Expanding the Regional Arts Sector	Campbelltown	Ongoing. Master plans for the CAC has been submitted to State Government.
Motor Sport Technology Precinct	Campbelltown	No longer being pursued.
Glenfield to Macarthur Urban Renewal Corridor Strategy	Campbelltown	Council completed a recreational trail study for Glenfield to Macarthur (Georges River Recreational Trail) and is currently seeking to continue implementation of this.
Regional Sports Facility	Campbelltown	Campbelltown Sports Centre of Excellence is currently underway. The project commenced in June 2017 and estimated completion date is February 2020
Boutique Glamping in Forest Parks/Reserves	Campbelltown	Council met with NPWS mid-2016 regarding this opportunity and they indicated they were preparing a Draft Plan of Management for the Dharawal National Park. The opportunities in the 2016 DMP were provided to NPWS for consideration. Discussions with NPWS for this updated DMP highlighted that NPWS were hesitant to introduce new facilities within the National Park because of the site's significance.
Bush Corridors for Leisure Tourism	Campbelltown	Two reports were completed (a review of bushwalking tracks and the Georges River Recreational Trail) and presented to Council on this project. Council is seeking to implement these projects.
Botanic Gardens Amphitheatre, Sculpture Garden and Luge	Regional	The Botanic Gardens have incorporated elements from the previous DMP into their 2017 master plan. Discussions with the Gardens for this DMP identified they are still keen to potentially pursue a number of options including an adventure/recreation attraction.
Food Trails and Cooking Schools	Regional	Yet to be activated.
Leisure Focused Open Space Corridor	Regional	Yet to be activated. Identified in this DMP as an ongoing opportunity.
National Equine Centre	Regional	No longer being pursued.
Leveraging off Badgerys Creek Airport	Regional	Council has developed numerous plans and strategies to leverage off the Western Sydney Airport. This will be an ongoing project as further details on the Airport are released, including the location of the Aerotropolis.
Link between Western Sydney Parklands and The Australian Botanical Gardens	Regional	Yet to be activated. Identified in this DMP as an ongoing opportunity.

■ Activated/ongoing work being completed | ■ Yet to be activated but still an opportunity | ■ No longer being pursued

Recommendation	Identified as Regional or Campbelltown-Specific Opportunity	Status
Caravan and Holiday Park Expansion	Regional	Council has been liaising with private property owners to locate a site for a potential new destination holiday park.
Arts Trail	Campbelltown, but has potential to be a regional initiative	Yet to be activated. Identified in this DMP as an ongoing opportunity.
Riverside Activation	Campbelltown	Council completed a study on the Georges River Recreational Trail and is currently seeking to continue implementation of this.
Regional Music Festival	Regional	Yet to be activated. Identified in this DMP as an ongoing opportunity.
Stimulate Investment into Macarthur	Regional	While Council has been actively pursuing a range of investment options, this DMP identifies the need to create a tourism investment memorandum to showcase investment opportunities to the development community.
Marketing & Promotion		
Develop a Medical Tourism Strategy	Campbelltown	HEP vision document was completed as a broader medical precinct assessment. This DMP builds on the HEP and potential medical tourism opportunities.
Brand Identity	Regional	Council went to tender in mid-2018 to complete a City Branding and Identity Plan for Campbelltown. It is envisaged that this will incorporate a destination brand element. This DMP reinforces the need for this.
Redeveloped Tourism Website	Regional	Currently underway, anticipated completion in September
Virtual reality app	Regional	The project about to commence, Campbelltown only
Event Calendar	Regional	Macarthur.com includes an events calendar. This DMP identifies the need to separate out community events from destination events.
Event Evaluation	Regional	Yet to be activated. Identified in this DMP, as part of an events strategy, as an opportunity.
Packaging of Product	Regional	Yet to be activated. Identified in this DMP as an ongoing opportunity.
Car Enthusiast Destination Promotion	Regional	No longer being pursued.
Tourism Awareness Campaign	Regional	Yet to be activated. Identified in this DMP as an opportunity.
Industry Support		
Industry Taskforce	Regional	Not being pursued currently but identified in this DMP as an opportunity going forward (however, as a Campbelltown only initiative and retitled as a Tourism Advisory Group)
Visitor Servicing		
Review of Visitor Information Services throughout Macarthur	Regional	Council undertook a review of staffing and hours at the VIC in 2016/17. Long term plan is to potentially consider co-locating the VIC. This DMP recognises the need to again review visitor services throughout the LGA.
Roving Ambassador Program	Regional	Yet to be activated. Identified in this DMP as an ongoing opportunity.
Free Wi-Fi at the VICs	Regional	Yet to be activated. Identified in this DMP as an opportunity.
Signage Program	Regional	Yet to be activated. Identified in this DMP as an opportunity.
Gateway Landscaping	Regional	Yet to be activated.
Visitor Data Base	Regional	This DMP provides a detailed profile of the LGA's visitor economy.



3. Campbelltown's Visitor Economy

3.1. Total visitation

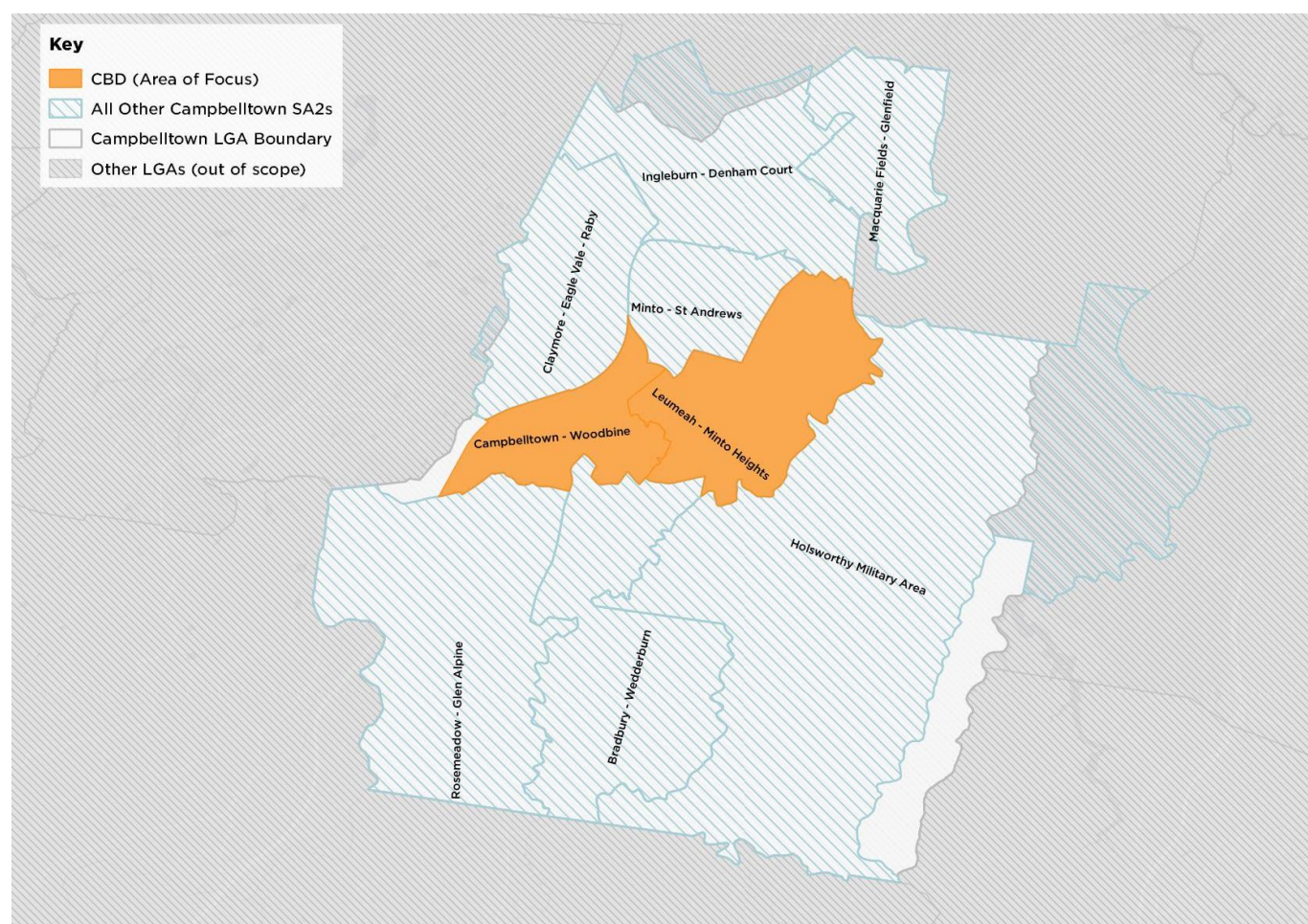
3.1.1. Methodology

Visitation data for Campbelltown has been gathered from the National and International Visitor Surveys (NVS and IVS). Data from the NVS and IVS is based on Statistical Area 2 (SA2) areas, which are then collated based on the SA2s which fall within each LGA. Figure 8 demonstrates:

- the SA2s which fall within Campbelltown LGA (noting that SA2 boundaries do not perfectly align with LGA boundaries⁷); and
- the SA2s which form the CBD area of Campbelltown (i.e. the area of primary focus for this DMP), highlighted in orange, and noting this is as geographically focused in/detailed as the NVS and IVS data allows.

Visitation has been derived based on three-year averages over the period 2010 to 2018 (March YE). Three-year averages have been used for robustness because of sample size challenges when data is being assessed at an LGA level⁸.

Figure 8: SA2s in Campbelltown LGA and DMP focus area



⁷ When an SA2 falls across two or more LGA boundaries, the SA2 is included in the LGA which has the largest part of the SA2 within its boundaries.

⁸ Compared to a state level which generally provides a more robust sample size.

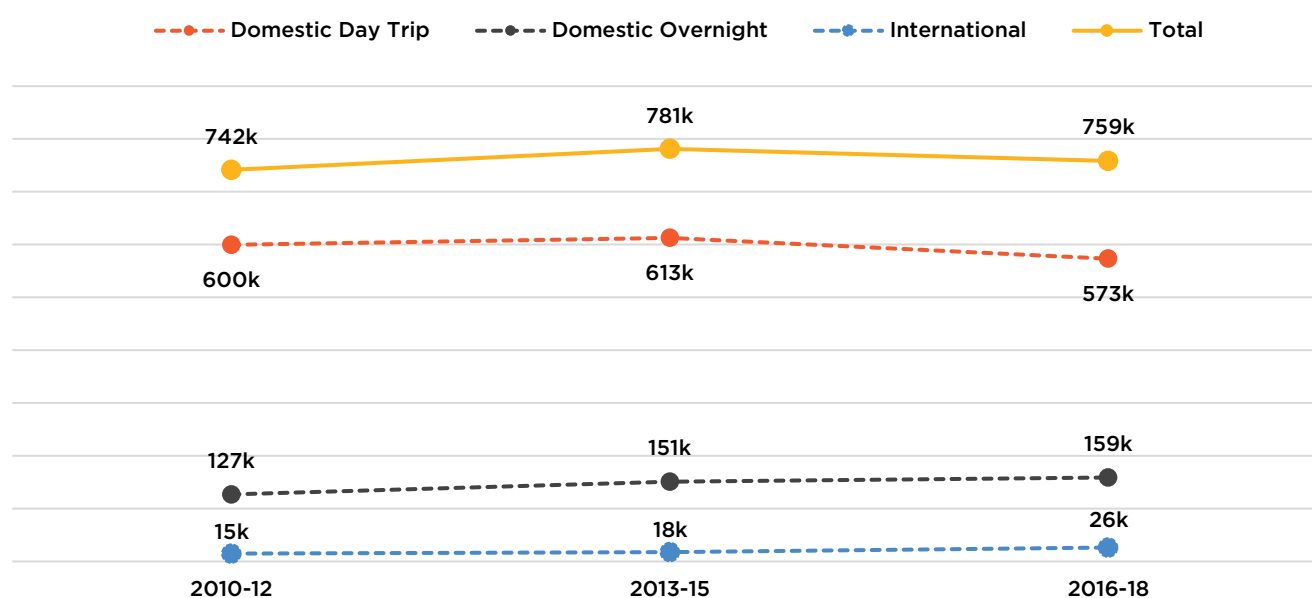
3.1.2. Total Campbelltown visitation

Figure 9 demonstrates that, over the three-year period 2016-2018, Campbelltown received 759k visitors. The vast majority of these visitors (76%) were domestic day trippers, followed by domestic overnight visitors (21%) and international visitors (3%).

Interestingly, while there was a slight drop in total visitors from 2015 to 2018⁹ (falling by 23k visitors), this is attributed to a decline in domestic day trip visitors (falling by 39k visitors); domestic overnight travel over the same period grew by 8k and international overnight by 9k.

While the importance of the day trip market is not discounted, overnight visitor markets (both domestic and international) generally contribute far more to a region's economy through increased spend on food and beverage, accommodation and transport (by way of example); it is a higher yielding market. This DMP, therefore, focuses on initiatives to continue to grow the overnight market to Campbelltown due to stronger economic outputs.

Figure 9: Total Campbelltown visitation¹⁰



⁹ Based on three-year averages over the period 2010-2018 (March YE data).

¹⁰ Based on three-year averages over the period 2010-2018 (March YE data). International Visitor Survey and National Visitor Survey, Tourism Research Australia. It is important to note that while the NVS had March YE 2018 data, the IVS currently has March YE data up to 2017. A three-year average has therefore been applied to estimate 2018 March YE data for international visitors.

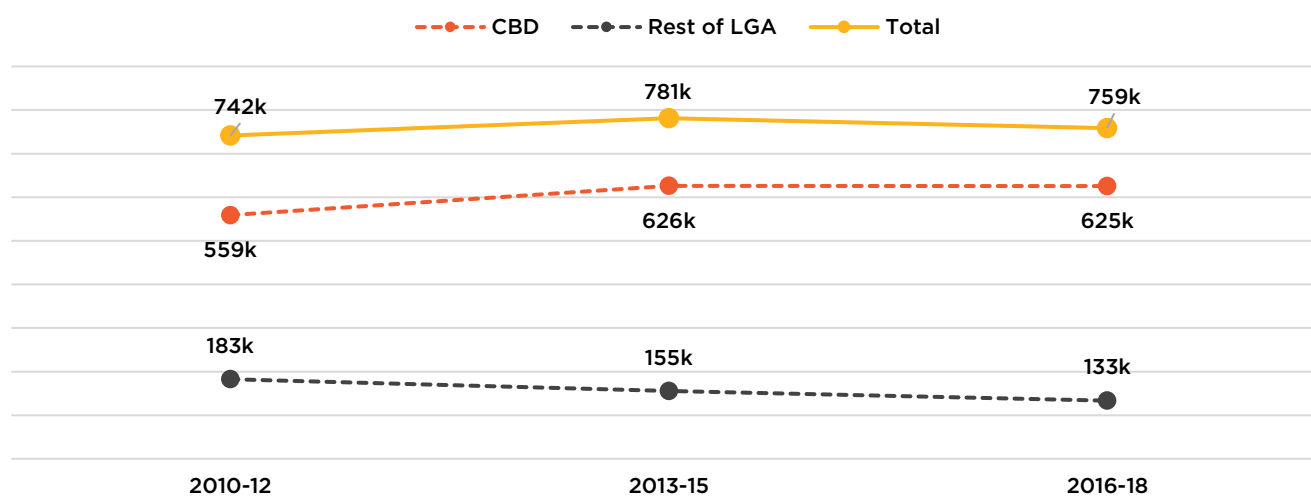
3.1.3. CBD visitation

Figure 10 demonstrates that in 2018 (March YE) the vast majority of visitation to Campbelltown LGA was to the CBD precinct, comprising 82% (625k visitors) of all visitation. The balance of visitation to the “rest of the LGA” (18% of visitation) is assumed to primarily comprise VFR visitors.

Importantly, while visitation to the “rest of the LGA” has declined by 27% (49k visitors) over the period assessed, visitation to the CBD has continued to grow, increasing by 12% (66k visitors).

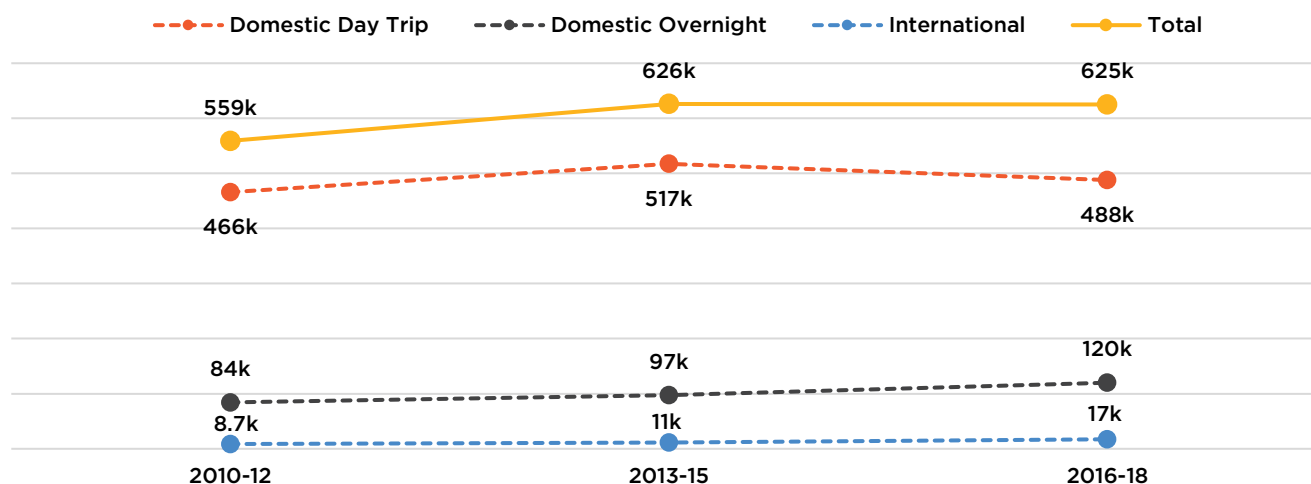
The visitation data demonstrates that the CBD is currently the major destination hub for visitors (as well as locals) in Campbelltown. Council’s plans to revitalise the CBD is likely to result in even stronger visitor numbers to this hub.

Figure 10: CBD & rest of LGA visitation¹¹



As with total visitation to Campbelltown, the majority of visitors to the Campbelltown CBD comprised domestic day trippers, comprising 78% of total visitation. This is followed by domestic overnight visitors (19%) and international visitors (3%).

Figure 11: CBD visitation by visitor type¹²



¹¹ Based on three-year averages over the period 2010-2018 (March YE data). International Visitor Survey and National Visitor Survey, Tourism Research Australia. It is important to note that while the NVS had March YE 2018 data, the IVS currently has March YE data up to 2017. A three-year average has therefore been applied to estimate 2018 March YE data for international visitors.

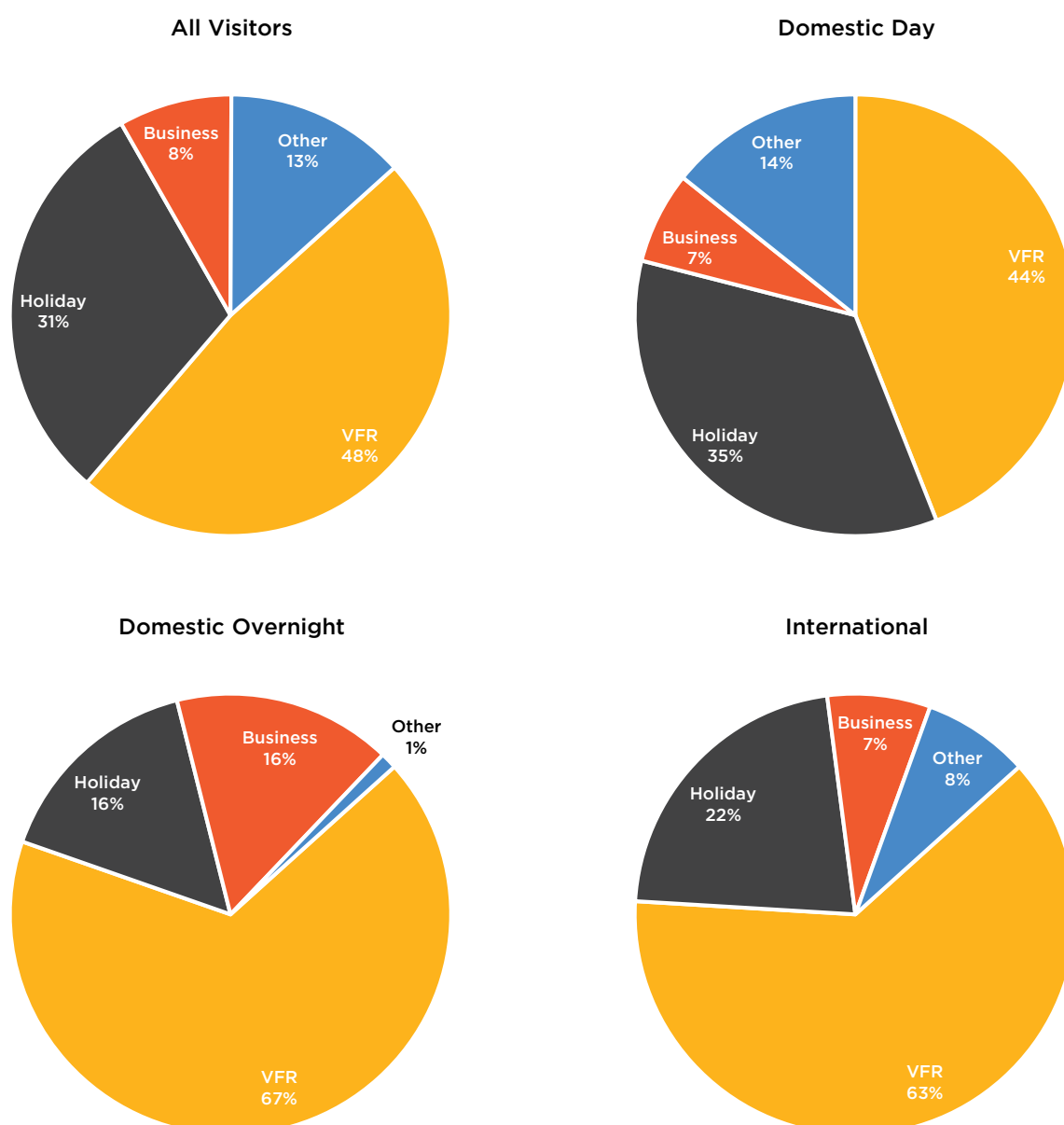
¹² Based on three-year averages over the period 2010-2018 (March YE data). International Visitor Survey and National Visitor Survey, Tourism Research Australia. It is important to note that while the NVS had March YE 2018 data, the IVS currently has March YE data up to 2017. A three-year average has therefore been applied to estimate 2018 March YE data for international visitors.

3.2. Motivation for visitation

Figure 12 provides the purpose of visit, by visitor type, to Campbelltown, as an average over the five-year period from 2014 to 2018. This indicates that currently, Campbelltown generates a large proportion of visitation from those visiting friends and relatives, comprising 48% of all visitation to the LGA.

The strength of the VFR market, particularly for domestic overnight visitors (67%), is important to recognise as the opportunity exists to introduce and market a variety of experiences in Campbelltown to locals who then, in turn, would potentially take their visiting friends and relatives to visit these attractions/experiences.

Figure 12: Purpose of visit to Campbelltown (five-year average over period 2014-18)^{13,14}



¹³ International Visitor Survey and National Visitor Survey, Tourism Research Australia. It is important to note that while the NVS had March YE 2018 data, the IVS currently has March YE data up to 2017. A three year average has therefore been applied to estimate 2018 March YE data for international visitors.

¹⁴ The "other" category includes: Transit, Employment, Education, Medical reasons, Personal appointment/business (excl health), Providing transport, Attend Funeral and No other reason.

3.3. Comparison with surrounding LGAs

Figure 13 - Figure 16 provides a comparison of visitation to Campbelltown as well as seven other LGAs within the greater Sydney region. The heatmapping demonstrates total visitation, domestic day trip, domestic overnight and international visitation based on a three-year average from 2016 to 2018 (March YE).

The comparison demonstrates:

- Out of the eight LGAs assessed, the Blue Mountains is the most well-known and mature tourist destination, receiving the highest level of visitation across all categories. Being located within close proximity to a major destination presents the possibility of leveraging off this strong visitor market if product synergies can be established and promoted.
- The Blue Mountains, in particular, has a strong international visitor market, primarily driven by tour buses which travel up to Echo Point for the day and deliver an estimated 650k day coach tourists each year.
- Penrith is also a strong destination, ranking second most visited by the domestic overnight and domestic day tripper market (and ranking second for overall visitation). Over the last four years (since 2014¹⁵), Penrith has aggressively positioned itself as the “Adventure Capital of NSW” with an aim to double visitor numbers by 2025. This has been built off a strong niche which the LGA has with adventure product¹⁶.
- Campbelltown ranks fourth in terms of domestic day trip visitation, fifth for domestic overnight and third for international visitation (which we suspect is driven by a VFR market).
- Overall, Campbelltown ranks as the fourth most visited LGA out of those assessed. Campbelltown is strategically well-positioned to the Sydney and Parramatta CBDs and within good proximity of Sydney Airport and the planned Western Sydney Airport.

¹⁵ <https://www.penrithcity.nsw.gov.au/News/New-Era-of-Tourism-for-Penrith---The-Adventure-Capital/>

¹⁶ Including (but not limited to): iFly (indoor skydiving); Jetpack Adventures; go karting and motor racing; paintball; whitewater rafting; Skyepeak adventures (outdoor aerial course) and escape rooms.

Figure 13: Visitation comparison – total visitation

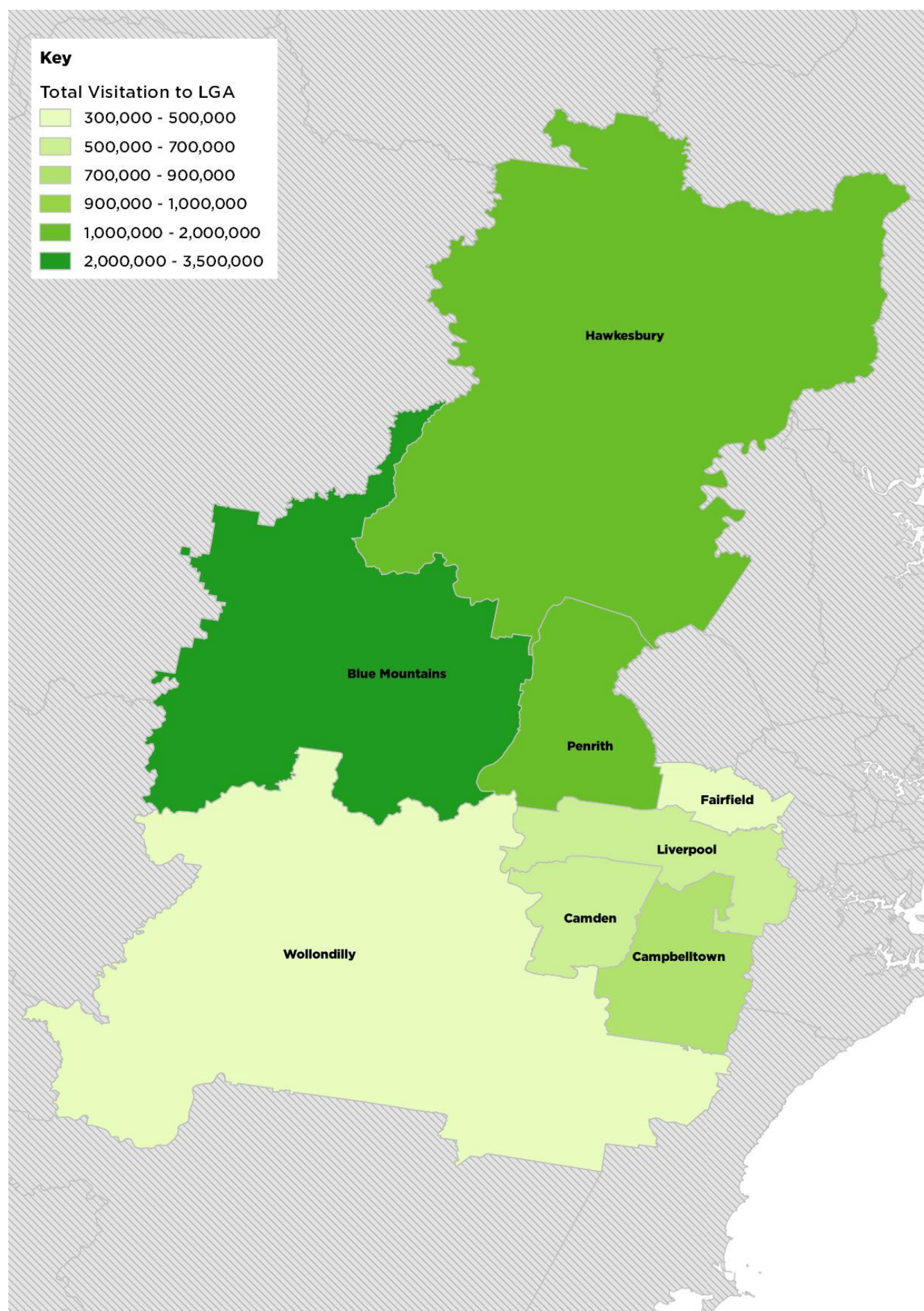


Figure 14: Visitation comparison – domestic overnight visitation

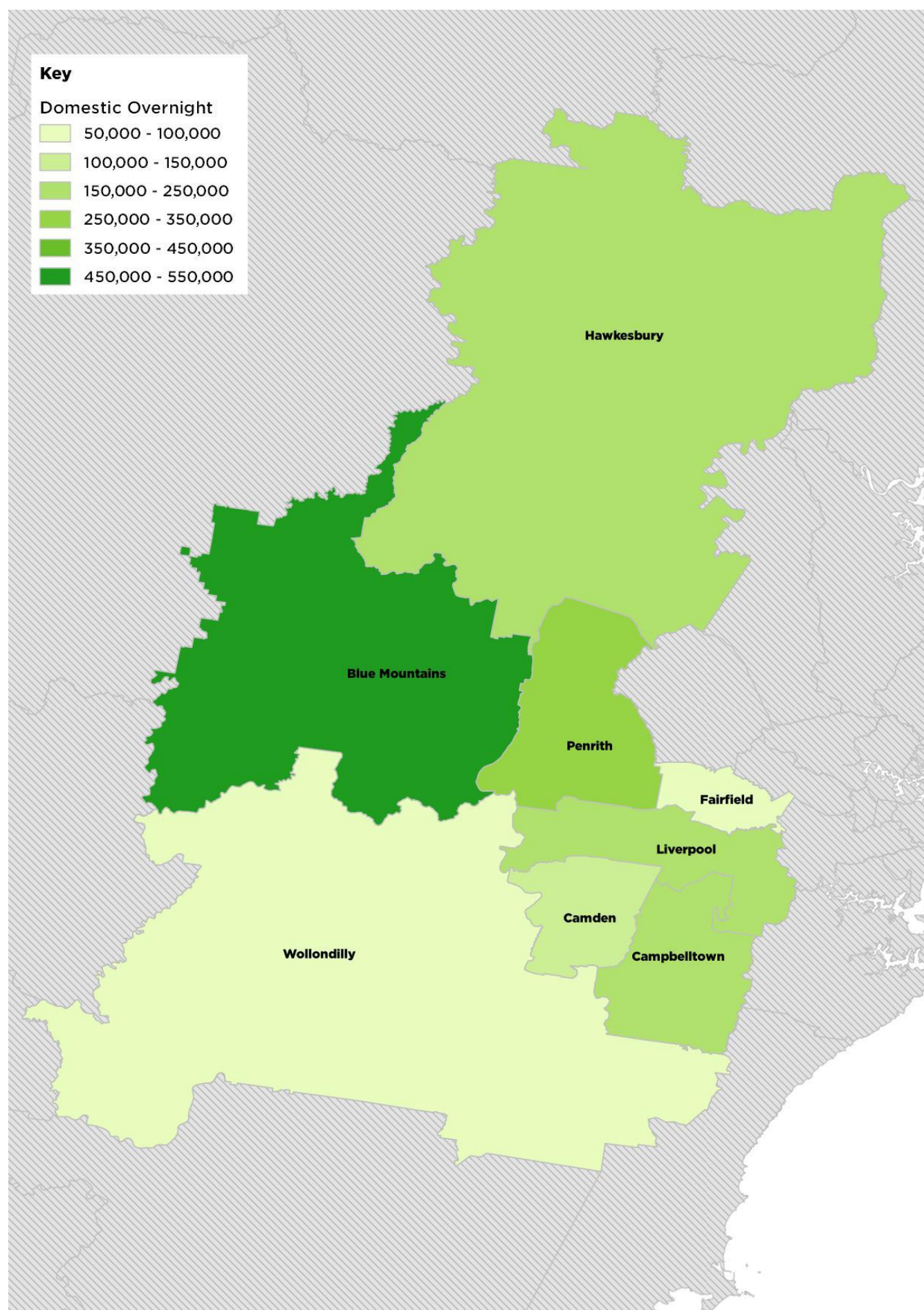


Figure 15: Visitation comparison – domestic day visitation

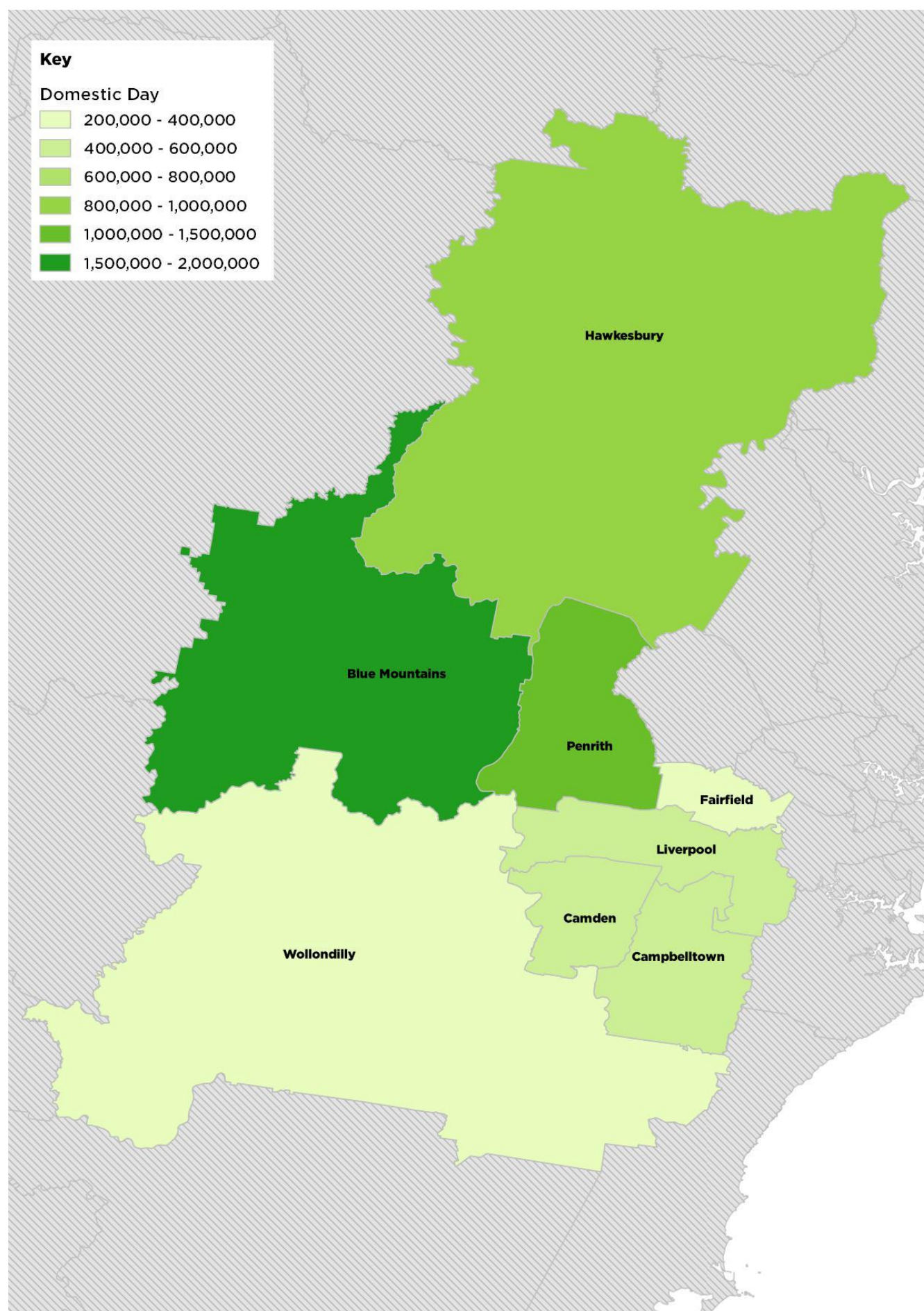
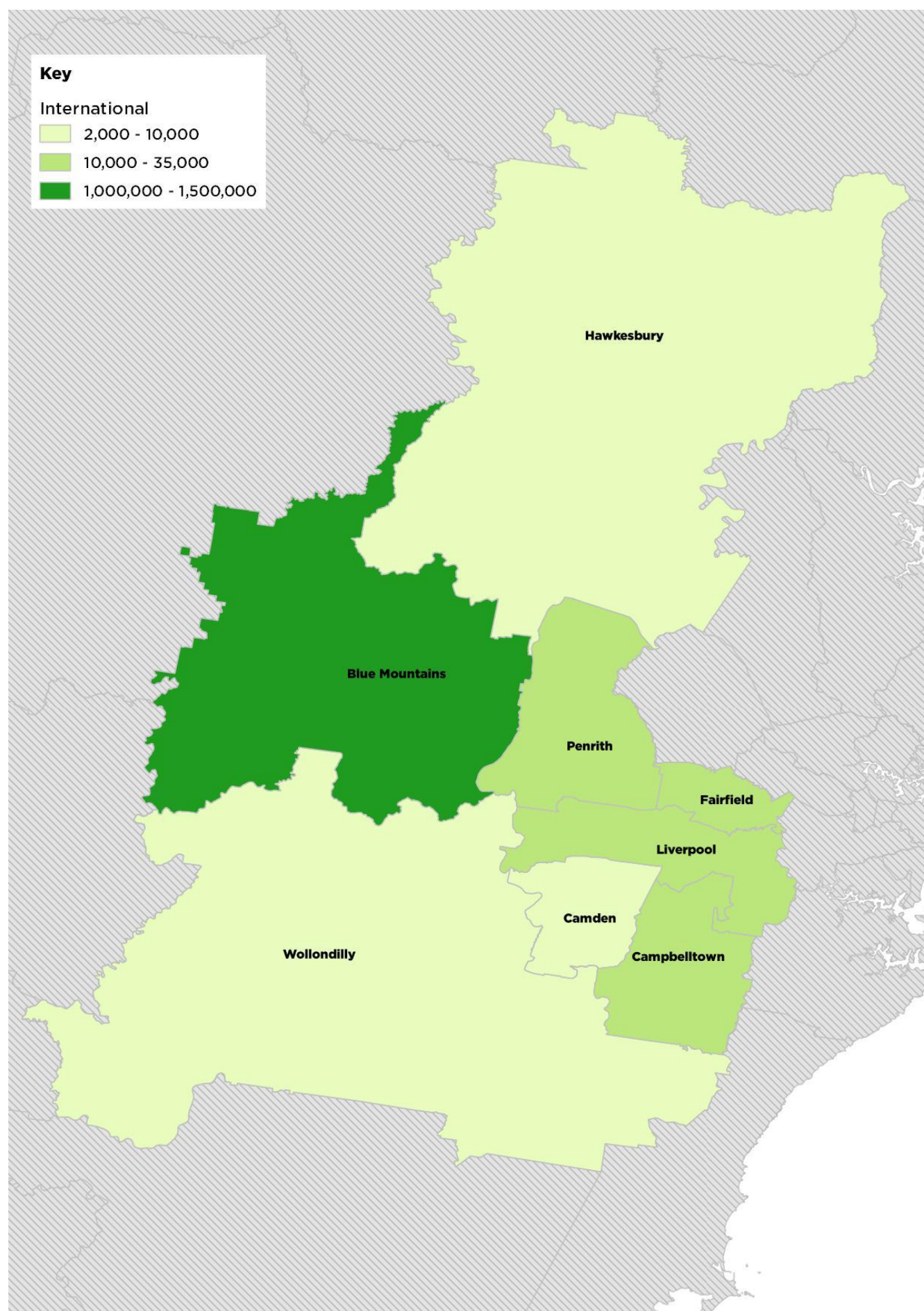


Figure 16: Visitation comparison – international visitation



3.4. The value of Campbelltown's visitor economy

3.4.1. Visitor Spend

Table 4 demonstrates that:

- visitors spent an estimated \$240.6m in Campbelltown;
- while domestic overnight visitors represent only 21% of total visitation to Campbelltown, they account for the largest proportion of spend (49%); and
- similarly, while international overnight visitors represented 3% of visitation, they generated 25% of spend - this demonstrates the higher yielding nature of the overnight (domestic and international) visitor markets.

The recommendations in this DMP deliberately focus on commissionable product (that is, paid for tourism product) which should assist in growing average visitor spend in Campbelltown rather than focusing purely on growing total visitor numbers; *yield-less visitor volume is a scenario to be avoided.*

Table 4: Visitor spend in Campbelltown (based on a three-year average from 2016-18)¹⁷

	Est. Spend p/visitor (\$)	Visitation (2016-18)	Visitation Split (%)	Total Spend (\$)	Total Spend Split (%)
Domestic Overnight	\$747	159k	21%	\$118.8m	49%
Domestic Day	\$106	573k	76%	\$60.6m	25%
International Overnight	\$2,317	26k	3%	\$61.1m	25%
Total	-	759k	100%	\$240.6m	100%

3.4.2. Employment and output

Table 5 on the following page provides a summary of employment and output generated through the visitor economy. It demonstrates that:

- 2,244 people are employed in the tourism sector in Campbelltown, representing 4.0% of total employment;
- of these, 75% are employed in full-time positions; and
- the sector generated just under \$620m in economic output (including direct and indirect sales and value-added), comprising 7.2% of total economic output in Campbelltown.

Although as a proportion of total employment and economic output the visitor economy appears to represent a small share, the potential for growth is high as tourism activations will increase employment in food and beverage, accommodation, entertainment services, retail, events and conferencing. It is dependent on new product being introduced.

¹⁷ Visitor data is based on the IVS and NVS. Spend per visitor data is based on data for the Sydney Region (which includes Campbelltown) as a breakdown on an LGA basis for LGAs within the Sydney Region is not distributed (<https://www.destinationnsw.com.au/wp-content/uploads/2018/06/travel-to-sydney-snapshot-march-2018.pdf>).

Table 5: Tourism employment and output in Campbelltown (2016/17)¹⁸¹⁹

	Campbelltown City	% of total industry	NSW %	Campbelltown City as a % of NSW
Employment (total)				
Direct	1,582	2.8%	4.8%	0.9%
Indirect	662	1.2%	1.7%	1.0%
Total	2,244	4.0%	6.6%	0.9%
Employment (FTE)				
Direct	1,059	4.5%	8.3%	0.8%
Indirect	634	2.7%	4.5%	0.9%
Total	1,693	7.2%	12.8%	0.8%
Output/Sales (\$m)				
Direct	\$215.5m	1.7%	2.8%	0.7%
Indirect	\$194.4m	1.6%	2.1%	0.9%
Total	\$409.9m	3.3%	4.9%	0.8%
Value added (\$m)				
Direct	\$117.3m	2.2%	3.4%	0.7%
Indirect	\$92.7m	1.7%	2.5%	0.8%
Total	\$209.9m	3.9%	5.9%	0.8%

¹⁸ 2016/17 is the most recent data provided through Economy ID - <https://economy.id.com.au/Campbelltown/tourism-value?BMID=20&Tourismtype=2>¹⁹ Stafford notes that Campbelltown has both Remplan and Economy ID packages which both outline tourism-related employment and output. Both packages demonstrate differing figures which we assume is because each package applies different tourism intensity ratios to each ANZSIC industry segment. For consistency, Stafford has applied Economy ID data as we have used the Profile ID and Forecast ID packages (part of the ID package which includes Economy ID) for population and demographic data in this DMP. Additionally, Economy ID provides a more detailed breakdown of tourism-related employment and output than Remplan.



4. Supply-Side Audit

A supply-side audit has been undertaken on both accommodation and tourism product within Campbelltown. It is important to note that while the audit provides a quantitative assessment of the number and type of product, it does not include a qualitative assessment (i.e. a review of the quality of product).

4.1. Product/experience audit

4.1.1. Audit summary

Table 6 provides a summary of the tourism assets and product for Campbelltown.²⁰ It demonstrates the following.

- In total, the audit identified 96 tourism-related attraction and services experiences.
- The majority of experiences (paid or free) are recreation (including sporting product), representing 31% of product identified. This is followed by entertainment (19%) and arts, culture and heritage product (15%).
- The majority of recreation and sporting product, as well as entertainment product, appears to primarily serve a local community, rather than being major tourism drawcards. This includes product such as cinemas, bowling alleys, aquatic facilities etc. which also exist in many other surrounding LGAs and which clearly serve a local community.
- Importantly, the majority of product identified is free (56%). While having free things for visitors to do is an important part of any visitor economy, there is a balance required. To grow visitor yield in Campbelltown requires introducing more commissionable tourism product which could be in the form of paid tours, admission fees, packaged product etc.

Table 6: Attractions and experiences audit for Campbelltown²¹

Category	Count	%
Free	54	56%
Recreation	15	16%
Natural Areas & Parks ²²	13	14%
Arts, Culture & Heritage	12	13%
Market	7	7%
Clubs	4	4%
Entertainment	2	2%
Tours	1	1%
Paid	42	44%
Entertainment	16	17%
Recreation	15	16%
Tours	8	8%
Arts, Culture & Heritage	2	2%
Food Experience ²³	1	1%
Total	96	100%

²⁰ It is important to note this is a top line audit completed via a desktop research exercise. It, therefore, may exclude those attractions which are not currently listed on major destination websites.

²¹ The full findings of the audit are in Supporting Documentation 1.

²² This category does not include all parks and reserves across the LGA (we note there are over 300 which Council owns and manages), but rather, covers major parks etc. which may act as drawcards and which are also included in Campbelltown's visitor experience guide.

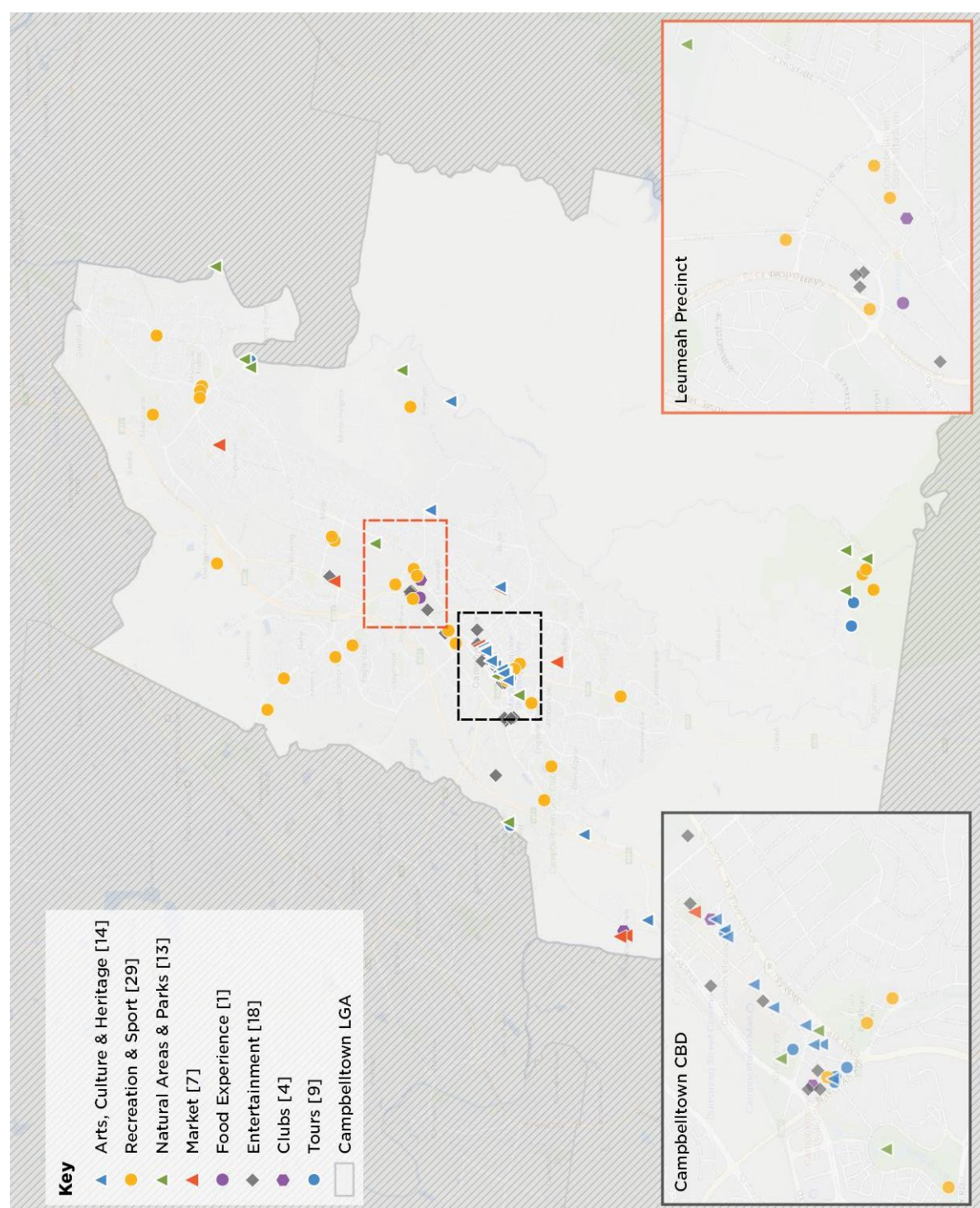
²³ This category does not comprise all F&B within Campbelltown, but rather, covers unique food experiences such as cooking schools, breweries, wineries etc.

4.1.2. Spatial summary

Figure 17 spatially maps the product offering in Campbelltown. It demonstrates that:

- product is primarily clustered around, or within close proximity to the Campbelltown CBD;
- there is limited tourism product which leverages off Campbelltown's two major natural attractions (the George's River and Dharawal National Park);
- the Australian Botanic Garden is situated in both Campbelltown and Camden LGAs, though the opportunity exists to activate the southern gateway to the Garden which is via Campbelltown LGA; and
- while 'recreation and sport' product is more evenly distributed across other parts of the LGA (when compared with other categories), this primarily comprises local sporting and recreational facilities, rather than tourism product (stadiums, sports hubs).

Figure 17: Product spatial audit

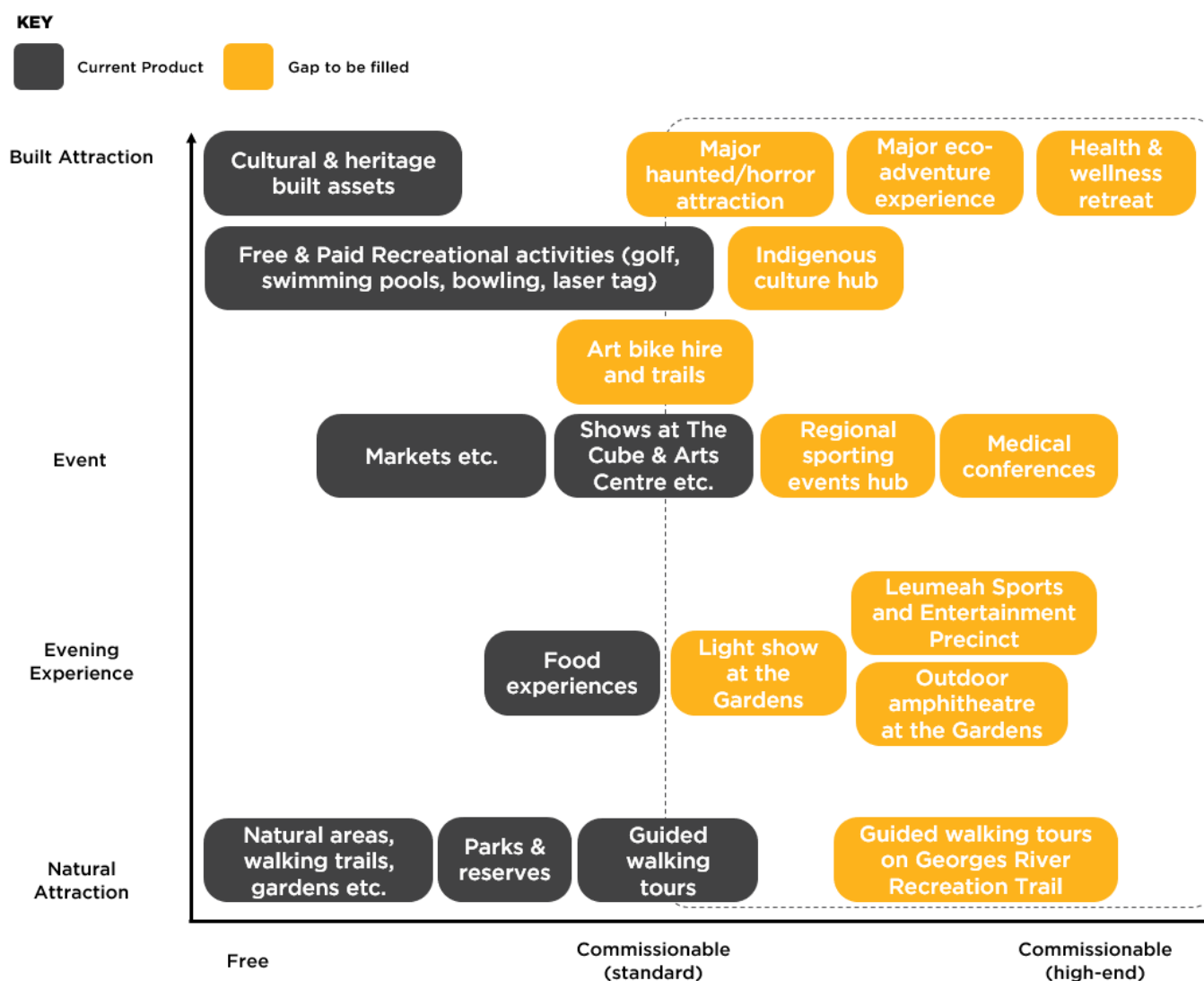


4.1.3. Gap analysis

Figure 18 provides a gap assessment of the attractions/experiences sector in Campbelltown. It demonstrates that:

- there is a large amount of free and self-guided product;
- free and paid recreational activities generally include those which are offered in many other surrounding LGAs – such as bowling, laser tag, swimming pools and golf etc. - so do not provide a unique point of difference for Campbelltown;
- there are limited evening-based experiences to encourage a longer length of visitor stay and to provide experiences which locals can enjoy rather than having to travel out of the LGA to undertake evening-based activities;
- there is limited product which currently leverages off the Australian Botanic Garden; and
- there is limited all-weather and family-friendly product (aside from passive walking and gallery/museum experiences).

Figure 18: Product gap assessment



4.2. Accommodation audit

4.2.1. Audit summary

Table 7 provides a summary of the accommodation audit for Campbelltown.²⁴ The top line audit demonstrates the following.

- There are nine accommodation properties in the LGA. This is evenly distributed between hotels, motels and student/group accommodation (3 per category).
- In total, there are 662 rooms²⁵ in Campbelltown. Hotels offer the largest supply of room numbers (307 or 46% of room stock).
- The 662 rooms include 204 beds in student/group accommodation which is generally only used for group bookings or for students rather than casual visitor bookings so from a marketing perspective, should potentially be removed as it skews the results.
- Campbelltown is fortunate to have three branded accommodation properties including Rydges, Quest and Ibis. The Rydges property is currently undergoing expansion and the 154 rooms indicated includes the additional 38 rooms which are currently under constructed.²⁶
- Campbelltown has no destination holiday park accommodation. The current caravan park within the LGA caters primarily for permanents only.

Table 7: Accommodation audit for Campbelltown (sorted by number of rooms)

Category & Property Name	Count of Properties	% of Properties	Count of Rooms	% of Rooms
Hotel	3	33%	307	46%
ibis budget Campbelltown	1	11%	72	11%
Quest Campbelltown	1	11%	81	12%
Rydges Campbelltown	1	11%	154 ²⁷	23%
Motel/Motor Inn	3	33%	151	23%
Campbelltown Colonial Motor Inn	1	11%	31	5%
Maclin Lodge Motel	1	11%	85	13%
The Hermitage Campbelltown	1	11%	35	5%
Student/Group Accommodation	3	33%	204	31%
Minto Bush Camp	1	11%	30 beds	5%
Wedderburn Christian Campsite	1	11%	144 beds	22%
WSU Village Campbelltown	1	11%	30 beds	5%
Total	9	100%	662	100%

²⁴ It is important to note this is a top line audit completed via a desktop research exercise. It, therefore, may exclude those properties which are not currently listed on major accommodation and destination websites.

²⁵ Note, for student/group accommodation, the number of beds has been included to account for the fact that groups usually share this style of accommodation.

²⁶ <http://taylorau.com.au/projects/rydges-Campbelltown-hotel-expansion/>

²⁷ Includes the 38 rooms currently under construction

4.2.2. Spatial summary

Figure 19 spatially maps the accommodation offering in Campbelltown. It demonstrates that all hotel and motel accommodation product is clustered around the Campbelltown CBD.

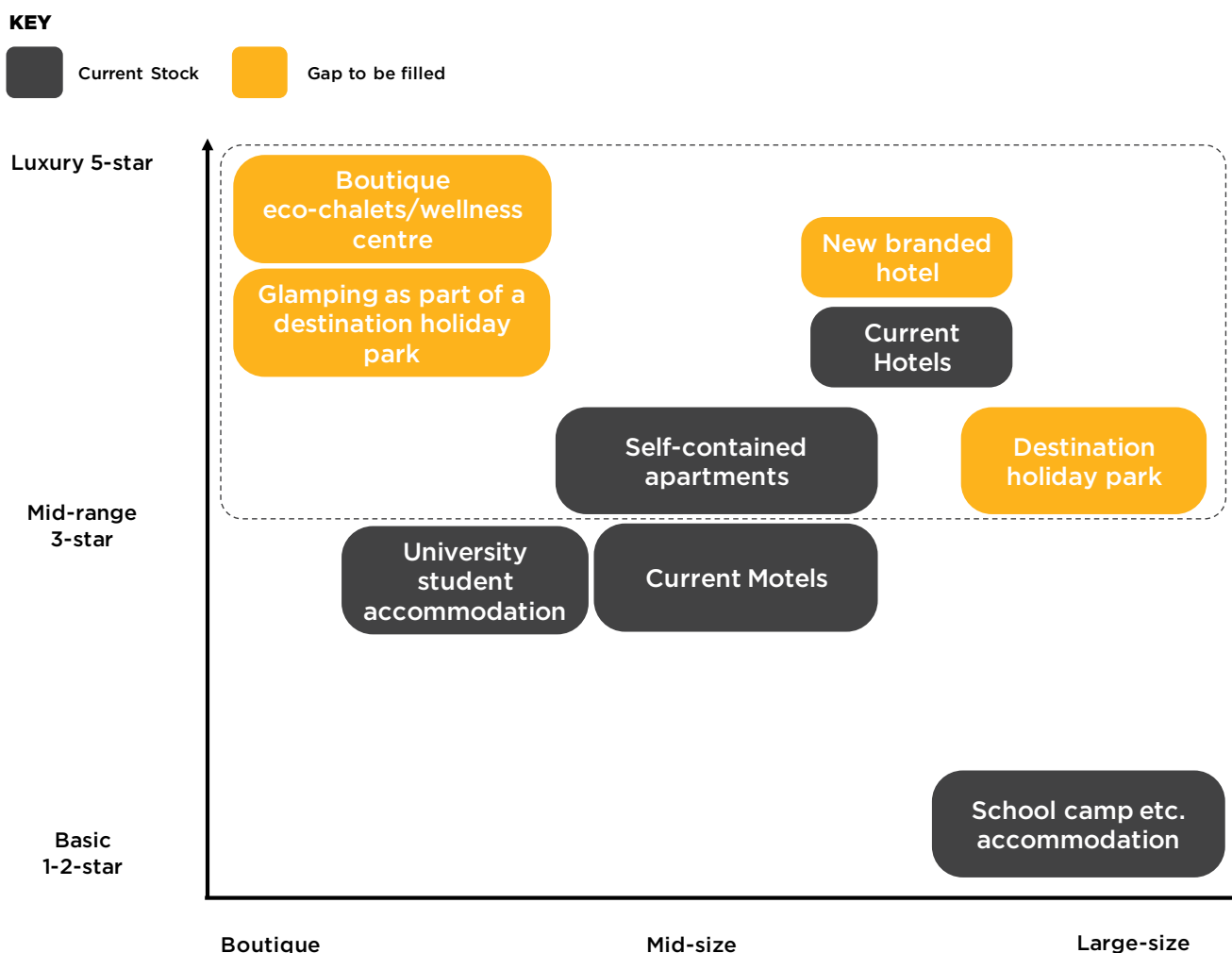
Figure 19: Accommodation spatial audit



4.2.3. Gap analysis

Figure 20 demonstrates that Campbelltown is fortunate to have a fairly good mix of accommodation across the quality/star rating categories including larger, branded properties. Feedback from industry, however, indicates that current stock, particularly the higher-quality branded properties, have strong occupancy rates which limit the potential to significantly grow the LGA's overnight visitor market. Opportunities exist to: introduce a high-quality branded destination holiday park; a new branded (120+ room hotel); as well as more boutique, luxury product such as a wellness centre with eco-accommodation to build the supply capacity.

Figure 20: Accommodation gap assessment





5. Barriers to Growth

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

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

Some of these barriers were identified in the previous Macarthur DMP completed by Stafford. They have been included again because they were highlighted by industry or identified by Stafford as challenges which still need to be addressed.

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

5.1. Product and supporting infrastructure barriers

5.1.1. Lack of signage (interpretive and wayfinding)

Campbelltown currently has a lack of interpretive and wayfinding signage. Directional signage, particularly within a CBD, is crucial to encourage visitors to explore places of interest, understand important heritage sites and to highlight walks that can be completed through the CBD to attractions (such as heritage, art trails and cultural walks).

The improved signposting of Campbelltown's natural and built attractions will encourage visitors and the community to make better use of these facilities for walking, cycling and picnicking etc.

There is also a lack of interpretive signage when entering Campbelltown and at attractions. What should be considered are attractive gateway signs on major access roads into Campbelltown, highlighting the key experiences and branding of the LGA. For most travellers on the Hume Highway, Campbelltown would only be perceived as a residential dormitory suburb of greater Sydney; that is, the current experiences and facilities would be generally unknown.

5.1.2. Lack of major destination events calendar

While Campbelltown has a diverse community event portfolio, event operators appear to work in isolation and are often unaware when other events – which may be similar to their events – are being held. While the LGA's current destination website²⁸ does have an events calendar, it is unclear which events are major destination events (i.e. those events that draw a market from outside Campbelltown and its immediate surrounds) and which are primarily local community events.

²⁸ <http://www.macarthur.com.au/whats-on>

5.1.3. Lack of tourism investment

There has been a lack of investment in the tourism industry, particularly into attraction/experience-based product, from commercial developers and operators over some time. Operators also commented on the inability to upgrade existing tourism product because of a lack of capital as well as zoning/planning restrictions at times.

There is benefit in Council developing a tourism investment memorandum to indicate the type of tourism development to be supported in principle as well as the preferred locations for tourism development. Investors are looking for certainty in where they can develop and what is more likely to be supported by councils.

Separately, the issue of restrictive planning zones is an issue for potential tourism developers and investors, as interest already exists to build mixed-use high-rise development within railway station precincts and where higher development and greater density is encouraged by State Government.

5.1.4. Limited commissionable tourism product

Part of an ongoing challenge for Campbelltown in positioning itself as a visitor destination is the limited amount of commissionable tourism product available, packaged and actively promoted. Much of Campbelltown's tourism promotion focus is centred on free and natural experiences such as historic and nature-based walking and viewing experiences.

While having free experiences is an important part of a vibrant visitor economy, a balance with commissionable (paid) experiences is required to ensure higher yielding visitation is being encouraged.

5.1.5. Limited diversity of accommodation offer

While Campbelltown is fortunate to have three branded accommodation properties, it currently offers a traditional style of accommodation (i.e. hotels and motels). There is limited: self-contained room stock; boutique-style accommodation; as well as destination holiday parks.

Although the LGA does have one caravan park²⁹, this is focused on a permanent resident market, rather than the visitor market. With limited coastal sites available for destination holiday parks around NSW, and as many RV and caravan parks have closed due to the ongoing pressure for land development, including in surrounding LGAs, there may be potential to create a high quality and branded destination holiday park within Campbelltown.

5.1.6. Limited evening activities/night time economy

Campbelltown has a lack of evening activities for visitors and locals. This makes it challenging to: convince the day tripper market to convert their trip into an overnight visit; and to convince local residents to bring their travelling friends and relatives to visit the CBD during the evening. Stakeholder feedback indicates that residents currently travel out of the LGA for evening experiences.

²⁹ Denham Court Caravan Park

5.1.7. Limited higher-quality dining options

Whilst the Macarthur region does have a variety of cafes and ethnic cuisine to choose from, stakeholder feedback and analysis indicates a need to introduce greater diversity and higher quality restaurant and bar experiences. It is, however, also acknowledged that a higher quality food scene has been organically developing in line with the LGA's growing population and changing demographics. The need, however, exists to consider more "dining out" experiences rather than fast food outlets.

5.1.8. Limited room stock

Although Campbelltown has 458 commercial accommodation rooms (excluding student and camp-style accommodation)³⁰, feedback indicates that many of these properties achieve very high occupancy rates. While Rydges is currently midway through its expansion, with an additional 38 rooms to be added, research³¹ indicates that there is a need for more quality room stock.

5.1.9. Limited visibility of indigenous significance of Campbelltown

Campbelltown purportedly has the second largest urban Aboriginal population in NSW. There is, however, limited visibility of this as well as a lack of opportunities for Aboriginal people in Campbelltown to meet as well as to create and showcase art and craft. The Aboriginal community would benefit from a meeting place, a hub to undertake a variety of activities, which could also include being a base to run cultural tours from.

5.1.10. No signature destination event

The current event program for Campbelltown, while comprehensive, is focused on community events rather than destination events. Destination events are those which draw visitation from areas outside Campbelltown and its immediate surrounds.

5.2. Marketing and destination awareness barriers

5.2.1. Digital-savviness of operators

Although there are some operators in the LGA who have an up-to-date digital presence, there are some who lack the tools for developing this. There is a need to ensure that all tourism operators in Campbelltown are listed on the ATDW which is free for NSW-based operators. The ATDW is Australia's national tourism database and distribution platform. It currently represents over 40,000 small and medium-sized tourism products and destinations. Its ultimate function is to support the Australian tourism operators with digital marketing to help extend their exposure and attract more business online. Through a single listing, an operator's details will then appear on *Australia.com* and over 50 other websites such as *about-australia.com.au* and *planbooktravel.com.au*.

5.2.2. Limited host community awareness of the growth potential of the visitor economy

While the visitor economy is not Campbelltown's largest industry, it does play a key role in its economy, employing over 1,300 people (accounting for 4.4% of jobs in the LGA) and generating just under \$373m in economic output (3% of total economic output).³²

Additionally, what these statistics do not demonstrate is that the visitor economy is not just confined to one traditional economic sector, but rather, comprises many sectors (such as transport, education, accommodation,

³⁰ As per the accommodation audit completed for this DMP (see Section 4.2)

³¹ Completed as part of the Campbelltown Accommodation Feasibility Study

³² <https://economy.id.com.au/campbelltown/tourism-value>

training, food and beverage etc.). Growing the visitor economy, therefore, can generate broad-ranging benefits across a range of sectors.

There is a need for Campbelltown's residents (the host community) to better understand that a diverse economy will play a key role in its future success and sustainability, particularly when Western Sydney Airport is operational. While manufacturing and construction etc. will likely always be important sectors for the LGA, the visitor economy provides many opportunities to diversify Campbelltown's economy and many of these opportunities have strong synergy and complementarity.

Importantly, Campbelltown is operating in a highly competitive metro environment. If it is too slow to take up tourism opportunities, there is a real risk that other metro hubs such as Liverpool and Parramatta will overtake Campbelltown in various areas of the visitor economy.

5.2.3. Limited product packaging

There is limited product packaging available on destination-based websites³³ for Campbelltown and existing operators comment that finding suitable product to package is challenging. As additional new, marketable product is introduced, there is a need to develop packages which visitors can book, rather than providing suggested itineraries. Packages could include accommodation, transport, guided walks/cycling, food and beverage etc.

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

5.2.4. Perception of Campbelltown as a day trip destination

With 76% of visitors to Campbelltown being day trippers, there is a perception amongst visitors, tour operators, wholesalers and tourism intermediaries generally that Campbelltown is primarily a day market only. Overnight visitors currently will stay in the Sydney CBD and travel out to the LGA 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 level of accessibility to Campbelltown; and the perception that Campbelltown is not really a destination in its own right yet.

5.2.5. Strong competition from destinations such as Sydney and surrounding areas

Campbelltown's proximity to major destinations and brands such as Sydney and the Blue Mountains is a 'double-edged sword': while it can benefit from the tourism "trickle down" effect, being so close to these high-profile and highly marketed destinations can result in Campbelltown struggling to market and position itself as a distinct destination in its own right.

These major destinations are traditional tourism destinations. The opportunity for Campbelltown is to establish a very clear point of difference by potentially focusing on non-traditional areas of tourism such as medical tourism, health tourism, sports tourism, business tourism and legal tourism etc.

³³ Currently, the destination website is <http://www.macarthur.com.au/>

5.2.6. The tyranny of distance

While the proximity to the Sydney CBD and Sydney Airport provide an important local market and important gateway to Campbelltown, they also provide one of the greatest challenges.

The closeness of Campbelltown to the Sydney CBD is possibly seen by some markets (including locals) as merely an extension of Sydney rather than a destination in its own right. By comparison, the Blue Mountains and the Southern Highlands offer sufficient distance from Sydney to give the feeling that they are separate destinations and also benefit from different geographic landscapes and climate.

5.2.7. Updating the destination guide

The current destination guide for Campbelltown³⁴ includes a large number of operators throughout the LGA as well as some in surrounding LGAs³⁵. There is a need to develop the guide in an easy-to-update format so that those operators who are no longer operating are able to be removed³⁶ or when details change (such as website addresses etc.) they are able to be easily modified.

5.3. Planning and activation barriers

5.3.1. Activating reimagining Campbelltown

Re-imagining Campbelltown CBD is considered by a number of stakeholders as highly aspirational but with limited focus on activation of development, although Council has indicated that the master plan development for reimagining is the next stage and that will happen over the next 18 months. It is particularly important that activation occurs in a timely fashion to illustrate to developers and investors that implementation/activation is being strongly driven.

There is an opportunity to improve visitation options for Queen Street and a strong desire for a justice precinct to encourage more white-collar higher spend workers into the Campbelltown CBD.

5.3.2. The approval process for events

Feedback from event promoters highlighted that the DA process is seen as too cumbersome and too hard for event promoters. There is a need for an events toolkit which can:

- simplify the event application process;
- help event promoters (including offering greater certainty on event approval processes);
- demonstrate that Council is “open” for events; and
- identify event ready parks and reserves with pre-approved uses (noting that the majority of available open space is currently occupied by sport, and given the frequency of use for sport, this leaves few spaces with an opportunity to accommodate events).

5.3.3. Balancing housing and tourism needs

Tourism growth in Campbelltown is likely to continue to be challenged in trying to achieve a balance with State Government targets for new residential land releases. This also is factored in by State Government targets on employment growth. While not contrary to the needs of the tourism sector, it is certainly actively encouraging other industry sectors where the employment ratios are thought to be higher.

³⁴ Campbelltown Experience Guide

³⁵ Such as the Macarthur Centre for Sustainable Living (situated in Camden LGA) and various products situated in Appin (situated in Wollondilly Shire)

³⁶ For example, the Mountain Bike Trail at the Australian Botanic Garden is closed.

What may need to be considered is creating dedicated tourism and associated retail precincts which can act as nodes for tourism activity and which can help protect the character of town centres so the recreational and heritage values are retained.

The introduction of more major housing estates without sufficient open space areas and wider vegetated buffer zones will likely limit tourism potential in a variety of locations within or near urban centres in Campbelltown. It is important that tourism development is not pushed out into peripheral areas, making it harder to access etc.

Tourism facilities often link to local recreational facilities and are vital to encourage more locals to stay and enjoy their own local amenities, rather than travelling to the Sydney CBD for example, to experience some tourism activities.

5.3.4. Challenges in activating waterways and natural areas

The inability to activate commercial opportunities on waterways and natural areas is noted as a challenge not only in Campbelltown but other major tourism destinations in NSW (such as the Blue Mountains) and Victoria (such as the Great Ocean Road).

Local and state government planning approval processes are noted as unduly challenging and too time-consuming and costly for private interests to pursue.

The NSW National Parks and Wildlife Service (NPWS) have particular concerns about further activation of Dharawal National Park and its ability to absorb greater visitor numbers because of the sensitive nature of the National Park from a fauna and Aboriginal cultural perspective.

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

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

This issue has previously been raised with the Greater Sydney Commission as there are significant barriers to getting tourism development activated in Sydney generally, due to the restrictive nature of planning regulations and the lack of thought as to what tourism development actually needs within planning zones.

5.3.6. Event precinct site limitations

The parks within Campbelltown are classified as "Alcohol Free Zones³⁷". These parks, which often are identified as the preferred location for events, cannot host wine and food events (only the food component can occur)³⁸. There is a desire to bring in more outdoor events within the LGA but the current policy is seen as too limiting.

5.3.7. Oversupply of retail space

Feedback from industry and Council indicates that the retail market in Campbelltown is currently saturated because of the capacity of the two major shopping centres: Macarthur Square and Campbelltown Mall. The drivers of activation for the CBD are likely to be focused on areas other than retail and will need to be tenancy-led.

³⁷ <https://www.campbelltown.nsw.gov.au/Yourneighbourhood/NeighbourhoodIssuesRestrictionsandInfo/AlcoholFreeZones>

³⁸ Without a special license being which is apparently difficult to obtain.

5.3.8. Queen Street activation

Feedback from Charter Hall, who owns the Campbelltown Mall shopping complex in Queen Street, indicates there are public safety and related issues which detract from people's desire to want to travel to Queen Street. A major issue is a lack of vibrancy within the Campbelltown CBD and a need for far more attractive urbanscape and better safety provisions.

The limited activation presents the following risks/challenges:

- there is a real risk of losing anchor tenants because of the lack of business and pedestrian traffic;
- there is a need for more grade A quality office space, but this is not yet seen as a priority of Council to activate; and
- there are safety perception issues³⁹ in Queen Street and a very limited night time economy⁴⁰ which is thought to be partly attributed to this.

5.4. Governance and industry collaboration barriers

5.4.1. Campbelltown is not included in a Destination Network

In 2016, DNSW announced a major reform of its regional tourism model resulting in the Destination Network model. While some LGAs in greater Sydney were included in Destination Networks (such as Penrith and the Hawkesbury), many others – including Campbelltown – were left out of a Network. As a result, applying for State Government funding for tourism-related projects is more challenging.

Additionally, being included as a Sydney and Surrounds area challenges the ability of Campbelltown to position itself as a destination in its own right, given the broad diversity of experiences available in the vast area covered by Sydney and Surrounds and particularly within the Sydney CBD.

The continued move by State Government to focus on Parramatta as the second CBD (as part of the Greater Sydney Commission planning) of Sydney also challenges Campbelltown's ability to gain profile.

Campbelltown needs to continue to collaborate with surrounding LGAs, similar to the existing collaboration with other Western Sydney LGAs⁴¹ as part of the City Deal application. The eight LGAs in this network each offer complementary – rather than competing – product so the opportunity exists to profile and leverage off this existing partnership.

5.4.2. Lack of industry cohesion

Campbelltown is a diverse and rapidly growing LGA. Despite best efforts, the tourism industry is fragmented, and limited collaboration appears to occur. Without a formal regional tourism structure (or Destination Network) or a local tourism organisation (LTO) for Campbelltown, there is a need for Council initially to play a greater coordination role to bring together the tourism industry, and to assist in activating initiatives identified in this DMP.

³⁹ Though it is understood that crime statistics do not support this perception.

⁴⁰ It is noted that a Night Time Economy Strategy is currently being developed to identify mechanisms to activate Campbelltown's night time economy.

⁴¹ Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith and Wollondilly.

5.4.3. Large number of small operators

Campbelltown has very few medium to large-scale commercial tourism operators⁴². While the boutique nature of many operators in Campbelltown may offer a more personalised experience for visitors, there is a balance required as larger-scale operators tend to bring with them larger marketing budgets which not only market their product but also promote Campbelltown. Aside from some accommodation product and the Australian Botanic Garden, Campbelltown currently has limited export-ready tourism-specific product which can be marketed domestically and internationally.

⁴² Aside from accommodation properties and the Australian Botanic Garden.



6. A Vision for Campbelltown

To guide the continued development of Campbelltown as a destination and to strengthen the visitor economy, it is important that a destination vision is created which industry and all stakeholders buy into and support. The destination vision proposed is outlined in Figure 21 below, along with six goals which sit under this vision. The opportunities outlined in Section 7 are categorised under these goals. These goals also align with Campbelltown's Community Strategic Plan and this alignment has been demonstrated.

Figure 21: The DMP vision and activation themes

OUR DESTINATION VISION

By 2025, Campbelltown will double visitor spend through significantly growing overnight visitation, introducing a strong destination event program, and actively encouraging tourism investment into new products.

GOAL 1



Activate our CBD precinct

Ensuring our CBD is a vibrant destination for locals and visitors to enjoy during the day and evening.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).

GOAL 2



Expand & diversify our accommodation & product mix

To continue to attract visitors to our area, we need to introduce new and interesting things to do and places to stay.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 3



Leverage off our strengths & niches

In an increasingly competitive environment, we need to leverage off our strengths and niches (medical, health, sport, legal, arts and culture etc.), rather than competing for market share.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 2 (A respected and protected natural environment), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).

GOAL 4



Grow our destination events program

Events are an important part of our visitor economy. We want to ensure we have a diverse and coordinated calendar of events, including signature destination events.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 5



Stronger destination profiling of our area

To be competitive, we need to align with trends and new technology for marketing our area as a desirable place to visit, live, work and invest.

CSP Alignment: Outcome 1 (A vibrant, liveable city) and Outcome 3 (A thriving, attractive city).

GOAL 6



Achieve stronger support & coordination for tourism

It is important we work together (Council and industry) to achieve stronger coordination, partnerships and to activate new investment.

CSP Alignment: Outcome 1 (A vibrant, liveable city), Outcome 3 (A thriving, attractive city) and Outcome 4 (A successful city).



7. Recommendations for Activation

To activate the vision for Campbelltown and achieve the various goals listed in Section 6 requires the activation of various opportunities. The following section outlines these opportunities, which have been listed under the following activations areas: product and infrastructure development; accommodation; events; destination marketing; place activation; and governance and industry collaboration.

Some opportunities listed were identified in the 2016 Macarthur DMP but are yet to be activated for a variety of reasons. They have been updated and included in this DMP to reflect that they are still opportunities worth pursuing.

7.1. Product and infrastructure development

7.1.1. Art bike trails

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓			

Campbelltown, with its significant history, its highly-regarded Arts Centre as well as its large creative community, is noted as a cultural and arts hub for the broader region. To provide greater connectivity between its cultural facilities and to bring art etc. out into the streets of Campbelltown, the potential exists to create a series of art bike trails. The starting point or end point for these trails could be the CAC.

By way of example, Launceston and Hobart offer ARTBIKES which is a bike borrowing service which takes participants on an easy access tour to the city's cultural hubs including galleries and museums (Figure 22).

As part of the Re-imagining Campbelltown CBD Masterplan, the potential may exist to improve the “bike-friendly” nature of the CBD through introducing a series of bike trails.

Figure 22: ARTBIKES



7.1.2. Australian Botanic Garden Opportunities

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment		✓	✓	✓	✓	

The Australian Botanic Garden at Mount Annan covers 416 ha and is the largest botanic garden in Australia. The recent NSW budget allocated \$60m to develop a Centre of Innovation in Plant Sciences (a mega-herbarium facility) at the Australian Botanic Garden Mount Annan and a refurbishment of the existing National Herbarium building at the Royal Botanic Garden Sydney (see Figure 23). The new Centre will house a collection worth \$200m, including specimens gathered by botanists Joseph Banks and Daniel Solander during their voyage on HMS Endeavour to the Pacific 248 years ago, and is expected to create up to 350 jobs.⁴³

Figure 23: Proposed herbarium at the Australian Botanic Garden



While the Garden is only partly situated in Campbelltown LGA (approximately two-thirds of the Garden is in Camden LGA), the opportunity exists to work with the Garden to activate a number of opportunities, many of which either:

- primarily fall within the Campbelltown LGA; or
- will have significant flow-on benefits for Campbelltown's visitor economy.

These are outlined in the subsections below. Some of these opportunities were included in the Macarthur DMP, and, based on discussions with the Garden, we understand they remain opportunities.

7.1.2.1. Southern access to the Garden

Currently, entry to the Garden is via either Narellan Road or Mount Annan Drive entrances. With the significant residential development planned in Campbelltown LGA and adjacent to the southern part of the Garden, the opportunity may exist to create a southern entrance to the Garden.

7.1.2.2. Large Public Event Site

The Australian Botanic Garden currently provides a large public gathering event concert lawn, called the Lakeside Lawn, which is located in the centre of the Garden (on the Camden side). This could be further enhanced with targeted capital investment that enhances and protects the natural amphitheatre qualities of the space. The space

⁴³ <https://www.camdenadvertiser.com.au/story/5447747/60-million-herbarium-coming-to-botanic-garden/>

is a sufficient distance from surrounding area to minimise disturbance to local residents. Both Camden and Campbelltown Councils can support this activation through their event calendars and marketing activities.

If the Garden is unable to accommodate the large public event site, feedback from Council indicates the potential to possibly integrate the amphitheatre within the Leumeah Sport and Entertainment Precinct.

7.1.2.3. Major Eco-Adventure Activity

The Garden is keen to explore new, commercial activities which can be undertaken on the site and which complement the eco nature of the Gardens. The Campbelltown part of the Garden is steeper and may lend itself to various active/adventure experiences. While the Garden has historically had a significant mountain biking facility situated on site, we understand this has been closed in June 2017 because of a major weed issue, which was being spread by mountain bikers.

The opportunity exists to consider alternative or expanded uses for this site, which could potentially include:

- a luge track leveraging off the steep and hilly nature of the site;
- an aerial adventure course;
- a zipline experience; or
- a number of other eco-adventure experiences.

A feasibility assessment/business case should be undertaken to determine:

- the optimal eco-adventure activity model for the site;
- the cost of installation and development;
- potential markets the experience is likely to attract;
- ongoing operating costs as well as potential revenue streams; and
- a 10-year cost benefit assessment to demonstrate the viability of the experience.

7.1.2.4. Light show in the Garden

The success of Vivid, as well as illuminARTe (held in Picton), demonstrate the pent-up demand for family-friendly experiences which can be undertaken in the evening and which are not centred around F&B or traditional cultural experiences.

The opportunity exists to develop a light show in the Garden to showcase not only the significance of the Garden from a national perspective but also the broader history of the Macarthur region. The light show could potentially be operated on a pop-up, seasonal or permanent basis.

Figure 24 demonstrates four light show experiences held within gardens. Some of these examples are major experiences (The Eden Project and Gardens by the Bay) while others are smaller-scale, such as the Light Garden at Centennial Park which was a pop-up initiative⁴⁴). What this demonstrates is a strong desire by visitor markets to experience these unique environments not only during the day but during night time periods.

⁴⁴ Which was anticipated to attract a total of approximately 2,500 people over four nights, but which instead generated 10,000 visitors over the four-night period it was held (2,500 visitors per night)

With the development of the Centre of Innovation in Plant Sciences on site, the Garden is going to receive greater profile. A light show could leverage off this profile and would assist in attracting a larger number of visitors to the Garden (currently, 80% of visitation to the Garden is by locals).

The opportunity exists to investigate introducing a pop-up F&B at the same time as the sound and light show which would assist in generating a longer length of stay.

Figure 24: Evening garden-based light show experiences



Gardens by the Bay, Singapore



The Enchanted Forest, Scotland



The Light Garden, Centennial Park Sydney



The Eden Project, UK

7.1.3. George's River Recreation Trail

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment			✓			

Recreational walking has the highest participation rate (42.6%) of any sport and physical activity in Australia⁴⁵. Council has a desire to leverage off the LGA's natural assets, including the George's River, through the development of walking and cycling trails.

The proposed 'signature' walk for the LGA could be the Georges River Recreational Trail. In 2017, Council developed a Feasibility Study for this Trail, extending 62km from Glenfield to Wedderburn. The proposed Trail includes a combination of existing trails (primarily fire trails) as well as the construction of small parts of new trail. The estimated cost for the trail is between \$2m (lower estimate) to \$3.6m (higher estimate) which includes upgrading of existing trails, construction of new trails, crossing infrastructure as well as trail signage.

While the construction of the Trail would be a fantastic public good project, it is important to note that it would primarily be a local asset, rather than a tourism drawcard. While it would be used by some visitor markets, particularly those visiting friends and relatives, its primary function would be as a community recreational asset.

There is significant competition in the tourism sector for walks/trails, with many areas around greater Sydney having extensive and diverse track systems, particularly around the Blue Mountains, Ku-ring-gai, the Hawkesbury, and Wollondilly.

To activate the Trail for tourism would require significant investment, such as:

- overnight accommodation, such as glamping, to allow for a 3-day 2-night guided walking experience;
- on-water activations such as kayak/canoe launch points, which could also allow for a guided kayak tour to be operated;
- introduction of parking at appropriate locations along the Trail; and
- more extensive interpretive and wayfinding signage (the initial costs provided in the Feasibility Study appear to be low and would warrant re-assessment) to not only provide directions but also to highlight and showcase sites of significance.

7.1.4. Haunted attraction

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓	✓	✓	

Campbelltown, which was founded in 1820, is steeped in history. There are many interesting stories about the city, including the legend of Fisher's Ghost, one of Australia's most famous ghost stories. The location of the sighting of Fisher's ghost is "believed to be the intersection of what are now Queen and Dumaresq Streets in Campbelltown"⁴⁶.

⁴⁵ Based on AusPlay Data (provided by Council in Review of Bushwalking Tracks Report 170209_).

⁴⁶ Frederick Fisher and the legend of Fisher's Ghost - Your guide to Campbelltown's most infamous resident, Campbelltown City Council

The opportunity exists to leverage off the area's heritage stories through an attraction (pop-up, seasonal or permanent) and/or and events program which could be centred on the concept of "Macarthur Horrors" and which could build on the existing Festival of Fisher's Ghost, which we note is currently primarily a community event.

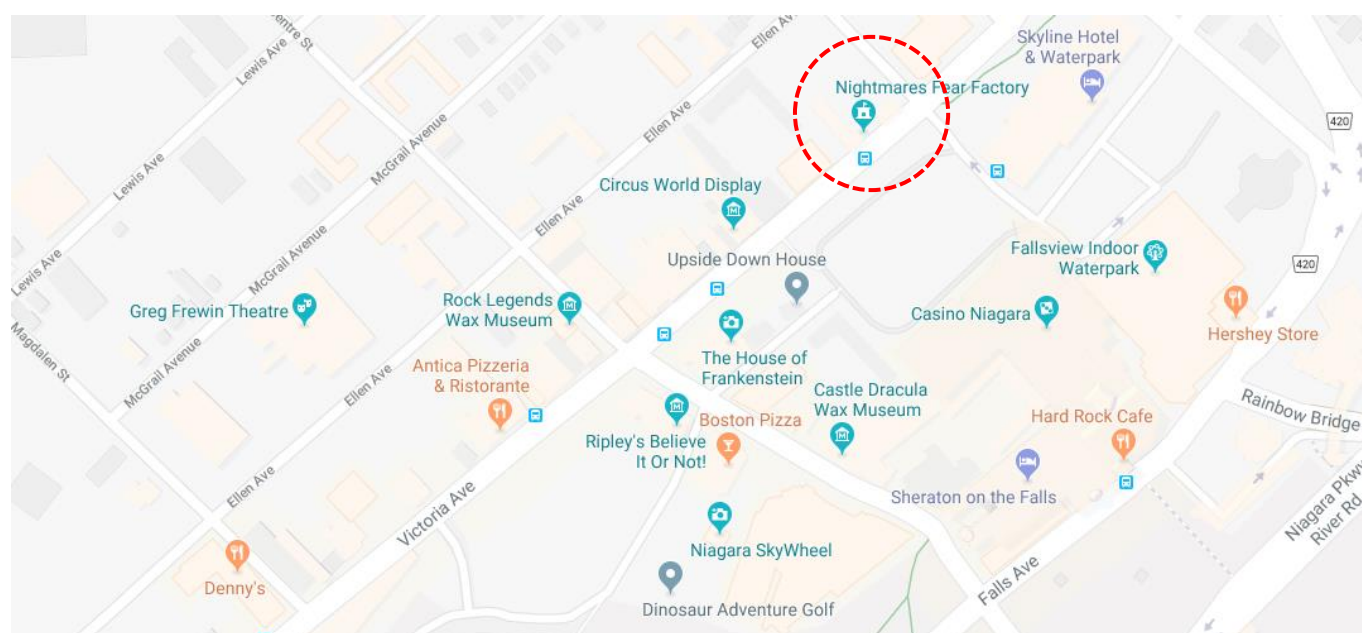
The concept could involve:

- identifying companies interested in creating a themed haunted experience in similar fashion possibly to www.spookers.com and possibly using redundant older buildings or other facilities (with its strong performing arts sector, the potential may exist to encourage those active in theatre productions etc. to consider partnering on the development of a themed horror experience);
- creating a horror food-themed festival with an associated horror film festival and through social media; and
- a 2 to 4-week series of horror-based events and experiences, possibly tying in with the Festival of Fisher's Ghost, commencing with Halloween and concluding over the month of November each year.

The opportunity for a permanent horror-themed attraction was identified in the Macarthur DMP. We understand Council was keen to activate this opportunity, however, it has been unable to identify a suitable site for such an attraction. To activate this opportunity, therefore, there is a need to market the opportunity to private landowners as we understand the operator of a major horror-themed attraction in Auckland NZ is still keen to find a suitable location in greater Sydney.

This major attraction could be situated at Leumeah, given the desire by Council to activate it as an Entertainment and Sporting Precinct. Other successful major haunted attractions globally are situated within similar precincts, such as the Nightmares Fear Factory in Canada, which is situated in a major entertainment precinct which includes attractions such as the Niagara Skywheel, Castle Dracula Wax Museum, an indoor waterpark, the Upside Down House as well as a variety of accommodation and F&B providers (see Figure 25).

Figure 25: Niagara Falls entertainment precinct



7.1.5. Indigenous Cultural Hub and Product Development

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment			✓		✓	

Campbelltown purportedly has the second largest urban population of Aboriginal people in NSW. Discussions with members of the LGA's Aboriginal community highlight that they are keen to preserve and showcase their culture and also to generate local employment opportunities.

The opportunity exists to explore the development of a community cultural hub which would allow Aboriginal people to practice their culture (arts, craft, language, performing arts), to gather and to showcase and display this to the local community as well as to visitors. Feedback indicates that because there is no current place for the Aboriginal community to meet, and cultural awareness within their own community is diminishing. A cultural hub would enable them to better educate their younger community members on their own culture as well.

The hub could also act as an anchor for other Aboriginal cultural experiences which could be developed such as an interpretive trail on the Georges River; an Aboriginal medicinal plant trail (which could link in with the proposed Centre of Innovation in Plant Sciences at the Australian Botanic Gardens); and guided tours/experiences at Dharawal National Park.

The development of the hub could be staged, which could include:

- Stage 1: a meeting hub which also has studio areas for art programs and the creation, display and selling of art;
- Stage 2: the development of a facility to allow for teaching and to better inform and entertain visitors, which could include: a keeping space (a place to store objects of significance); spaces for storytelling and to highlight fauna and flora and as a base for trails to go from; a training space to teach languages; and meeting rooms.
- Stage 3: development of guided cultural tours as both walking and driving tours to sites of interest including within the surrounding national parks.

A feasibility study is required to determine:

- the various elements which could make up the cultural hub (and in what stage), including commercial and non-commercial elements;
- the capital cost for the hub as well as ongoing operational costs;
- the estimated utilisation of the hub as well as visitation;
- which site offers the preferred location for the hub; and
- who could potentially lead the project's development as well as manage the day-to-day operation of the hub⁴⁷.

With respect to the development of Aboriginal cultural tourism product, the hub can act as the catalyst to allow various tourism concepts (tours, art and craft products, performances etc.) to be market tested and piloted to help reduce risk to the local Aboriginal community.

As part of product development options, there is also the opportunity to work closely with the Campbelltown Arts Centre who have a strong relationship with the local Aboriginal community and who already are involved in various

⁴⁷ There is a desire by those consulted for Council to kick start the project and then to pass this over to the Aboriginal community when ready to avoid burnout. Stakeholders consulted highlighted that having the appropriate expertise to manage the facility is needed.

Indigenous art based activations. Building on this relationship will be important in moving forward and creating various indigenous tourism arts-based products and experiences.

7.1.6. Interpretive and directional signage

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓					✓

The lack of signage (interpretive and directional), and the difficulty in obtaining signage, was noted by many as a challenge for Campbelltown. This includes gateway entry signage to create a sense of arrival into Campbelltown as well as signage to guide visitors to points of interest throughout the LGA.

There is a need for a signage strategy to be developed to:

- ensure a consistent approach to signage is applied throughout Campbelltown and which can, in turn, support circuits and other trails across Campbelltown; and
- educate operators on the process of applying for signage and the requirements that need to be achieved to have signage on main roads etc.

The Georges River Recreation Trail and the Campbelltown Arts Centre could be catalyst projects for applying directional and interpretive signage as there is currently a disconnect between the city and these attractions.

7.1.7. Investment memorandum

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment						✓

To encourage investment in Campbelltown's visitor economy, there is a need to apply a more proactive approach to stimulate investment. Reimagining Campbelltown supports the need for this and demonstrates that Council is committed to "improving certainty for investors with clear policies, expectations and design guidelines for new developments"⁴⁸.

To achieve this, an investment memorandum should be developed which can be provided to investors and developers to highlight "shovel ready" projects, and which should include the following.

- An overview of Campbelltown as a tourism destination including its main attractions.
- Historic visitation numbers to the LGA, broken down by market segment.
- Projected visitation numbers to the LGA.
- An audit of product currently available within Campbelltown.
- A summary of the type of product and development Campbelltown is looking to encourage, including the quality Campbelltown is wanting to encourage.
- A list of potential sites which are appropriately zoned for tourism development so delays in activation can be avoided.
- A list of potential tourism projects which Council wishes to encourage, but which they are not guaranteeing.

⁴⁸ Page 32, Reimagining Campbelltown Vision

Additionally, it is important that appropriate zoning for locations suitable for tourism/event infrastructure and development should be incorporated into the next phase of the Re-imagining Campbelltown CBD project.

7.1.8. Medical and wellness tourism

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓			

Campbelltown has been identified by State Government as a priority economic development area for South West Sydney, offering Greater Sydney's newest health and medical hub, with the potential to offer up to 31,500 jobs by 2036⁴⁹. The Stage 2 expansion of Campbelltown Hospital – costing \$632m – is the catalyst for this growth⁵⁰ and will assist in positioning Campbelltown as a major specialist centre for paediatrics and gastrointestinal disorders as well as Chinese and maternal medicine. This complements, rather than competes with, the focus of Liverpool Hospital which has a specialty focus on cancer and trauma.

Council's vision for the medical/health sector in Campbelltown, articulated through the HEP Strategy, is “to provide world-leading education and specialist community-based care in areas of paediatrics, Aboriginal health and gastro motility through new science-based research and discovery”⁵¹.

The potential exists to leverage off the strong growth anticipated in this sector and position Campbelltown as a destination for medical tourism, including health and wellness. To achieve this, the following opportunities exist.

- Encouraging the development of a conference facility which can cater for approximately 400 patrons and is situated within the hospital precinct.
- Introducing a branded, higher-quality accommodation property within and close to the hospital precinct to cater for visiting doctors, surgeons and lecturers etc. This could potentially be co-located with the conference facility.
- Promotion of Campbelltown's natural attractions and experiences to the large number of white-collar workers who may relocate to the LGA and who will expect quality recreational facilities.
- Developing a medical tourism strategy which could assist in attracting international people coming in for elective surgery where they can have the operation and recuperate in Campbelltown.
- Linking in with the proposed Centre of Innovation in Plant Sciences to provide an internationally significant research hub and a further visitor experience.
- Liaising with Campbelltown's indigenous community to potentially provide bush medicine tours in the LGA.
- Expansion into areas of medical tourism aligned with health and recovery so Campbelltown becomes positioned as a major centre for not only medical procedures but as a hub for recovery programs to support both patients and their families. This could also link in surrounding areas such as Wollondilly for more remote rest and recuperation sites and facilities.
- Further promoting Campbelltown's natural and open spaces and ensuring well-designed and planned open spaces continue to be considered going forward.

⁴⁹ Western City District Plan, Greater Sydney Commission

⁵⁰ State Government has committed \$632m for Stage 2 of the Campbelltown Hospital Redevelopment which includes mental health services and paediatric services (stage 1 was completed in 2016, costing \$134m).

⁵¹ Health and Education Precinct Vision and Strategy, Campbelltown City Council

7.1.9. National park experiences

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment			✓			

Dharawal National Park is considered a highly sensitive site, with populations of significant flora and fauna as well as sites of Aboriginal significance. While NPWS do not appear to be keen to encourage a significant uplift in visitation to the National Park, the opportunity does exist to continue to promote the existing guided tours which NPWS run as well as the walking and cycling track infrastructure which NPWS maintain.

7.1.10. Zoning for tourism

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment						✓

Too often, LEPs and DCPs outline what cannot be done in an area, rather than highlighting permissible uses. Investors look for certainty. Most planning instruments and related policies and strategies often fail to offer sufficient direction to encourage tourism investment to occur and tourism as an activity, is too often an afterthought in planning regulations.

If Council is keen to grow Campbelltown's visitor economy and encourage new and expanded tourism investment there is a need to consider the following.

- Specify within current planning instruments (LEP and DCP) where tourism development will be considered a preferred land use.
- To separately indicate within planning instruments where tourism development is an acceptable land use, if not preferred.
- To provide a preamble in planning instruments and strategic economic development and planning documents of what Council specifically wishes to see and will encourage, by way of tourism product so that greater clarity and certainty is provided to developers and investors.
- For areas where a night time economy is desired such as Queen Street and Leumeah sports and entertainment precinct, to provide greater specificity for what Council wishes to encourage within these precincts, including longer retail operating hours, greater building height flexibility, the range of food and beverage outlets etc.

Throughout greater Sydney, the inability of planning instruments to offer greater certainty and clarity for tourism development (events, pop-ups, permanent facilities etc.) has led to a general reluctance on the part of many tourism investors and development companies to want to consider tourism opportunities. Campbelltown needs to buck this trend and ideally offer an administrative and approval process which provides the certainty which investors and developers are looking for.

7.2. Accommodation

7.2.1. Destination holiday park

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment		✓			✓	

NSW, and Greater Sydney in particular, currently has an undersupply of destination holiday parks⁵². The primary issue is the lack of available and appropriately zoned land to allow for these to be established.

Campbelltown currently does not have any destination holiday parks, nor does it have any traditional tourist caravan parks⁵³. Feedback from the visitor information centre indicates that visitors frequently ask about caravan parks and because the LGA does not have one, visitors are sent to areas outside the LGA.

Destination holiday parks have the potential to drive far stronger visitation to Campbelltown, noting that users of such facilities include a wide range of visitors such as: traditional holidaymakers; attendees of major events (Sydney Royal Easter Show for both participants and visitors by way of example) and festival attendees; visitors wanting to travel with pets; business and conference attendees using cabins and chalets especially; school groups and those on education programs; those visiting friends and relatives; and those coming for niche areas of interest (medical tourism, sporting tourism etc.).

Figure 26 shows images of some of the higher-quality/signature destination holiday parks. These parks tend to: be operated by major operators (including Discovery Parks, NRMA, Big 4 and Ingenia, by way of example); offer a mix of facilities to guests such as: high-quality aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. as well as a range of accommodation options from high-quality eco-cabins to RV and camping sites; and often attract a family market who use the parks as a base for day excursions to surrounding regions.

Figure 26: Destination holiday park examples



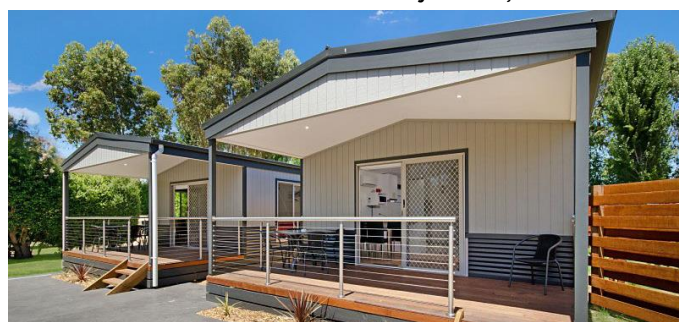
Deniliquin Holiday Park, NSW



Cairns Coconut BIG 4 Holiday Resort, NSW



Tathra Beachside Holiday Park, NSW



Port Fairy Holiday Park, VIC

⁵² Based on feedback from major destination holiday park operators as well as the Caravan and Camping Industry Association

⁵³ The current caravan park in Campbelltown is focused on permanent residents rather than a tourist market.

The introduction of a higher-quality destination holiday park in Campbelltown would capitalise on the significant growth in the destination holiday park sector from:

- a demand-side perspective, as more visitors are looking for family-friendly, destination-style accommodation; and
- a supply-side perspective as major branded operators are looking to establish new destination holiday parks for their portfolios.

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

- land area of 8 ha. or greater (able to be leased ideally for a minimum of 40 years + or purchased);
- capacity for 200+ powered sites, and 25-30 cabins/chalets;
- a focus on visitors rather than permanent residents;
- a family-friendly focus to attract the family market and to convert day trips into overnight stays;
- best practice design of facilities;
- amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kids' playground, daily children's activities, a café and a convenience store; and
- easy access to major roads and highways.

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

In addition to developing a destination holiday park, with the LGA's strategic location within greater Sydney and close to major freeways, the potential exists to investigate introducing an RV and caravan service centre and storage facility as part of a cluster. This could include: a mechanical servicing facility for RVs and caravans; a rental centre for those looking to hire an RV or caravan; and a storage facility providing RV and caravan owners with a safe place to store their RVs/caravans and have them serviced as required.

7.2.2. Health and wellness retreat

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment		✓	✓			

With Campbelltown's development as a major health and medical hub, the opportunity exists to develop a high-quality health and wellness retreat for those recuperating from illness or surgery and also for those looking for a retreat to focus on their health and wellbeing.

The retreat would need to ideally be situated in an area which is less developed, and which leverages off the natural environment which Campbelltown has in select areas.

Figure 27 provides examples of major health and wellness spas in northern NSW and Queensland which often rank in the top 10 best health retreats in Australia⁵⁴. The development of a similar quality and style of facility would provide Campbelltown with a unique point of difference as there is currently no such facility in greater Sydney.

Figure 27: Best practice major health and wellness spas⁵⁵



7.2.3. New branded accommodation property

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓	✓		✓	✓	✓

As indicated in Section 5.1.8, the majority of commercial accommodation providers in Campbelltown operate at high occupancy rates. The high occupancy rates have also meant that some operators have adopted a reactive rather than proactive approach to collective marketing and packaging.

A feasibility study completed in 2016 outlined adequate demand for a new, 120+ room higher-quality 4-4.5 star property. The feasibility identified a priority site for the development being the Library site (adjacent to the HJ Daley Library) and situated within the Civic, Cultural and Heritage Urban Core (as per the HEP Prospectus).

With the desire of Council to activate the Leumeah Sports and Entertainment Precinct, the potential exists to consider this site as well, noting that other major landowners within the Leumeah precinct have also expressed interest in offering a variety of commercial accommodation options (serviced apartments, fully serviced hotels etc.).

⁵⁴ <http://travelinsider.qantas.com.au/experiences/stay-fit-and-relax/10-luxe-wellness-retreats-in-australia>

⁵⁵ Golden Door, Hunter Valley; Gaia Retreat & Spa, Byron Bay; Gwinganna Lifestyle Retreat, Gold Coast

For such development to be encouraged, Council needs to:

- confirm its desire for specific sites to be activated for commercial accommodation especially;
- consider flexible height limits on sites to actively encourage commercial accommodation development with or without mixed-use development components;
- determine if a fast track planning approval process is possible to illustrate Councils commitment to activating new high-quality commercial accommodation on a timely basis; and
- create an investment memorandum to help market Campbelltown as an attractive venue for various forms of tourism development, including larger scale hotel facilities.

What needs to be constantly remembered is that other major metro hubs in Western Sydney also desire to encourage similar scaled tourism investment. The market is, therefore, actively looking to see which Councils are prepared to take a more proactive and supportive approach to encouraging these major projects.

7.3. Events

7.3.1. Civic events space with pop-up programming

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓			✓		

As outlined in Re-imagining Campbelltown CBD⁵⁶, there is a need for a new events/civic space for both informal and formal gatherings and events. To ensure the events space is well-utilised and activated will require continued programming of the space. This could be achieved by introducing pop-up eateries, shops as well as cultural facilities. Figure 28 demonstrates a recent example of a successful activation of an outdoor civic events and public space in Wodonga. The space, which is a disused railway square, is activated through the following.

- Permanent food and beverage providers (situated in discussed railway buildings).
- Temporary shipping containers which provide a mix of unique food and beverage experiences (including a gelateria) as well as retail (including a florist).
- Regular markets and events which are held in the space.
- Wodonga's major food and wine event is held in the space.
- An indoor events/function space which is available for hire.
- Clever lighting of the space to encourage night time usage.

This space in Wodonga works particularly well, also noting that Wodonga has a strong edgy arts scene, not unlike Campbelltown.

Planning for this civic events space should be incorporated into the CBD Masterplan as part of phase 2 of the Re-imagining Campbelltown CBD project.

⁵⁶ Page 31

Figure 28: Pop-up examples which have activated spaces



7.3.2. Destination event strategy

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment				✓		✓

Events are considered a mechanism to “feel more connected to other people, the community, and the world”.⁵⁷ Although Campbelltown has a vibrant calendar of events, there is only a small portion of these that yield high economic value and attract visitors from outside of the LGA. Most are seen as important community rather than visitor-focused destination events. There is also no existing events strategy which Council personnel can utilise to ensure Campbelltown’s event program is built on in a coordinated way.

It is recommended that Council develop an Events Strategy for Campbelltown to identify:

- current major/key events to evaluate actual running costs including costs incurred by various Council departments not directly involved, community and visitor patronage, economic and social impacts of these events etc.;
- current gaps within the existing events calendar and to determine existing key events that could be used to enhance visitation to the LGA;
- opportunities to develop a signature destination event for Campbelltown which is focused on encouraging visitation from those outside Campbelltown;
- learning/workshop experiences associated with events and festivals to offer broader community benefits where ever possible;
- prioritising existing community events and festivals and determining those which offer the best social and related benefits;
- assess potential sites for holding larger scale events;
- determining those events and festivals which can operate on a cost neutral basis or better for Council specifically; and

⁵⁷ Eventbrite Research Shows Australians Believe Events Inspire Positive Change, 6th September 2017, Ausleisure

- identifying how to build capacity for event organisers including identifying skill gaps and recommendations for targeted training on topics such as traffic management plans etc.

An Event Strategy for Campbelltown would provide a strategic framework for identified signature or key events, ensuring that these events further boost the economic, cultural and social fabric of Campbelltown.

7.3.3. Event toolkit and Event Gateway

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment				✓		✓

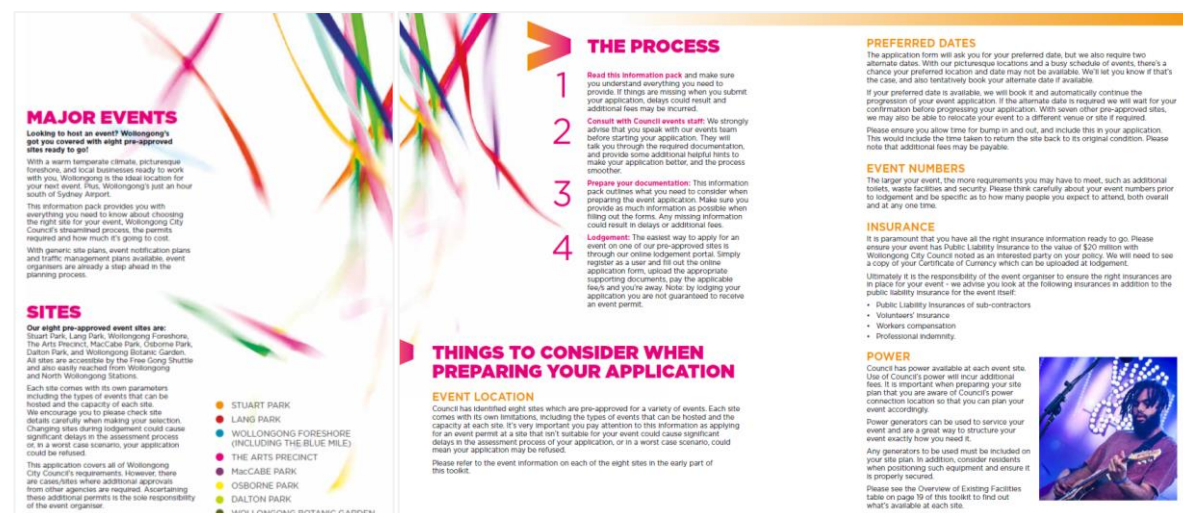
To grow the events sector in Campbelltown requires actively seeking out events and promoting to event organisers that the LGA is “open” for events. The opportunity exists to create a regional events toolkit which can be provided to event organisers which:

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

Figure 29 provides some sample pages from the Wollongong City Council Events Toolkit which is a best practice example of a proactive events promotion tool.

The opportunity also exists to introduce an ‘event portal/gateway’ at Council for initial event enquiries. This will enable prospective event organisers to be supported through the entire process if the event is considered to have potential and also to receive assistance in promoting the event.

Figure 29: Wollongong Events Toolkit (sample pages only)⁵⁸



⁵⁸ Available at: <http://www.wollongong.nsw.gov.au/city/events/toolkit/Documents/Events%20Toolkit.PDF>

7.3.4. Queen Street Music festival

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓	✓		

Campbelltown has a strong music and performing arts culture. In line with the LGA's forecast population growth, participation in this sector is expected to continue to grow. This sector, and particularly the live music sector, is finding it difficult to showcase their talent because of limited venues within the LGA and broader region to perform.

The opportunity exists to consider developing a music festival, possibly centred on a specific Queen Street Music Festival and temporarily closing off Queen Street for this. The festival could possibly be focused on the rock music genre, which might not only feature major national/international acts but could also feature a number of high-quality regional acts.

In addition to Queen Street, there are a variety of other locations throughout the LGA which could be considered for satellite music events such as Leumeah and the Australian Botanic Garden (we note there is an outdoor area which can cater for up to 10,000 attendees).

7.3.5. Regional sporting events hub

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment			✓	✓		

Campbelltown is well placed to position itself as a hub for major regional sporting events, including school-based events, niche sporting events as well as adventure-based recreation events. This is supported by:

- the large number of high-quality sporting facilities and precincts already available in the LGA;
- Council's desire to redevelop Campbelltown Stadium and its surrounding precinct as a major entertainment and sporting precinct;
- the Macarthur South West A-League soccer team bid; and
- the Campbelltown Sports and Health Centre of Excellence which is currently being developed at WSU.

Leveraging off Campbelltown's noted strengths as well as successful major events which have been held in Campbelltown, the potential may exist to focus on:

- netball, tennis, soccer and football;
- table tennis and badminton;
- e-sports which is noted as a growing segment;
- athletics and cross country running;
- orienteering; and
- events able to use permissible waterways for kayaking and canoeing.

While Campbelltown currently has a number of sporting facilities, they are dispersed across the LGA, rather than being clustered. There is a need to develop marketing collateral which:

- demonstrates the many facilities which the LGA does have and how these can be collectively utilised to cater for larger sporting events;
- highlights the high-quality accommodation which is available in the LGA; and

- outlines major related events which have been held in and continue to be held in Campbelltown.

Importantly, because Campbelltown is close to areas with major sporting facilities and which can cater for international and national events, it should look to focus in on the tier down, including major regional sporting events.

7.4. Destination marketing

7.4.1. ATDW awareness program

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

NSW operators receive a free listing on the ATDW, however, not all operators in the LGA appear to be listed on the database. There is a need to educate operators on the significant value and reach which is generated through having an ATDW listing, including that through a single listing, an operator's details will then appear on Australia.com and over 50 other websites such as about-australia.com.au and planbooktravel.com.au.

7.4.2. Community pride campaign

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

There is a need to introduce a community pride campaign which encourages the host community (local residents) to be advocates for Campbelltown and which helps reverse the negative stereotypes about the LGA (and Western Sydney in general) which is portrayed by the media, at times.

7.4.3. Destination brand for Campbelltown

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

Campbelltown is part of the Macarthur region (which includes Camden and Campbelltown LGAs) and much of the LGA's positioning has historically been associated with this branding. While the brand may resonate for residents within the greater Macarthur region, it does not appear to have achieved a strong profile as a destination brand.

We understand Council is midway through developing a city branding and identity strategy. It is important that, as part of this, a destination brand (which could sit under the city brand) is also considered. A destination brand differs from a city brand as this is focused on promoting the LGA as a place to visit, rather than to live and work in.

Importantly, any destination brand which is created needs to be developed in consultation with industry to ensure the identity is accepted and utilised by not only tourism operators and the industry generally, but other sectors of the economy and community.

7.4.4. Destination website for Campbelltown

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

Campbelltown's destination website is currently the shared website with Camden which promotes the collective Macarthur region (www.macarthur.com.au/). There is a need to develop a new and enhanced destination website focused specifically on Campbelltown LGA.

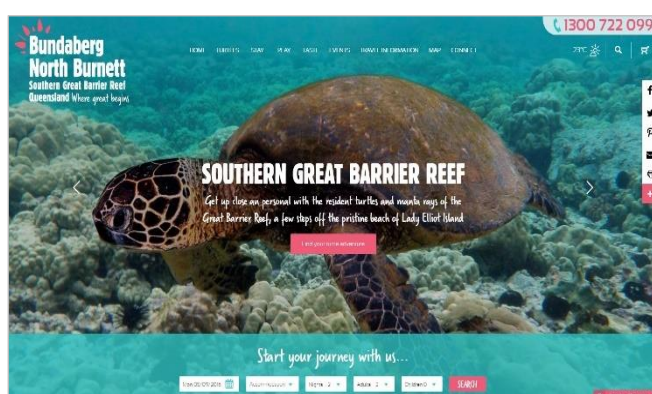
It is understood that Council is currently in the process of developing this new destination website. It is important that the new website/user interface is carefully designed to reflect and showcase: unique experiences in Campbelltown; the nature-based experiences, walking tracks, cycling tracks and lookouts; the range of operators and commercial experiences on offer; major events and festivals; and packages and itineraries which visitors can undertake.

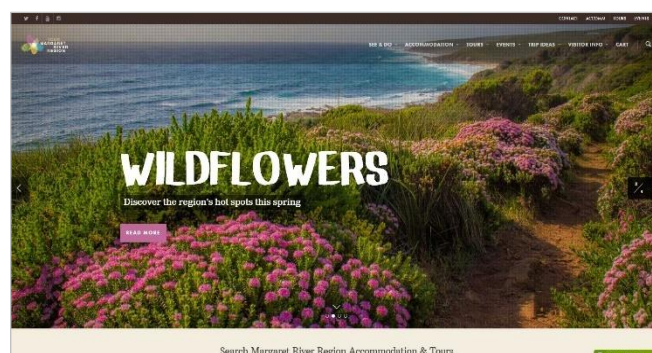
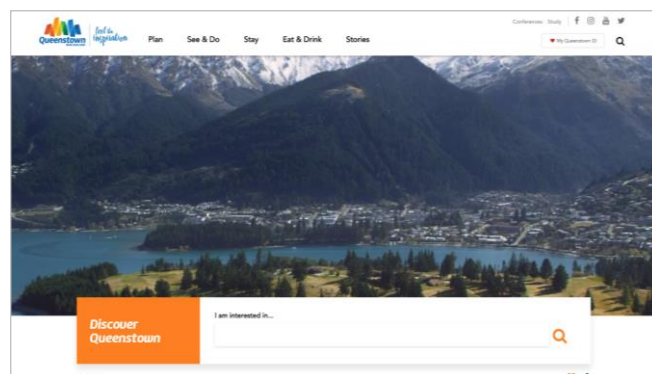
The website needs to be unashamedly tourism-based. While we recognise other local operators may want to be listed on the website, a criteria should be established to ensure a tourism focus is achieved. One of the major criterion being that operators must be listed on the ATDW to be listed on the Campbelltown destination website.

The destination website also needs to be designed and developed by destination website specialists. Figure 30 provides examples of best practice destination websites as examples only. While some of these websites are for much larger tourism destinations, they demonstrate what is possible and each has elements of best practice destination website design which provide valuable learning points for Campbelltown.

As part of the website's functionality, there is a need to investigate whether e-commerce functions (such as online booking) should be included. While having e-commerce functions can provide a range of benefits, it also may add complexity to managing the website and will require a larger budget for developing and maintaining the website.

Figure 30: Examples of Best Practice Destination Websites User Interfaces





7.4.5. Packaging of product

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

Operators within the tourism sector should be encouraged to package product available within and outside the LGA. The visitor market is competitive and sophisticated. Visitors will want to be able to undertake a range of experiences easily when travelling. Navigating the destination should be easy and rewarding. Potential product packages could include the following (by way of example).

- Accommodation + dining + unique experience, such as a guided tour of Dharawal National Park or an eco-adventure experience (see Section 7.1.2.3).
- Accommodation + dining + shopping + event participation, such as a show at the Cube or Arts Centre.
- Accommodation + dining + gallery tour + bike hire.

Importantly, product packaging needs to actively encourage night time events and experiences, to generate more overnight stays in Campbelltown and higher visitor spend.

7.4.6. Visitor economy community awareness campaign

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

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

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

A local visitor economy awareness campaign should be developed to demonstrate:

- how the visitor dollar disperses through the local economy (the direct and indirect impact of visitor spend);
- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc;
- how extended trading hours (even seasonally) can benefit the community;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many loaves of bread, cups of coffee and litres of fuel etc. are purchased by visitors on any given day); and
- why Council/ratepayer funding is required to maximise returns to Campbelltown's community via economic, social and infrastructure benefits.

7.4.7. Visitor information services strategy

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

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

Key findings from specific research⁵⁹ into visitor information services, and visitor information centres (VICs) specifically, highlights that:

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

⁵⁹ Conducted by Stafford over the last 20 years

National-based research recently released by Tourism and Events Queensland (Queensland's state tourism body) demonstrates that nationally, only 4.4% of visitors in Australia actually use a VIC on their trip.⁶⁰ Top line information demonstrates that Campbelltown's VIC currently captures 0.7% of all visitors to the LGA.⁶¹

The vexed question, therefore, is how is Campbelltown servicing the other 99.3% of visitors who are visiting each year?

Given that visitors do not recognise local government boundaries, a regional review of visitor information services and the VIC should be undertaken which takes into account current research and analyses future trends to ensure Campbelltown is achieving the best ROI for visitor information services. There are many new models (see Figure 31) being implemented in Australia and further afield which move away from the traditional "bricks and mortar" visitor information services to providing:

- mobile visitor information services throughout mobile kiosks (vans and trailers etc.) which can be relocated to where the visitors primarily are (such as for events or market days);
- roving ambassador programs which position well-experienced locals throughout a CBD or at major events to provide information as well as a personal and face-to-face interaction;
- automated information containers which open up during set hours and provide large multi-user touch screens;
- high-quality digital information platforms which provide cohesive and up-to-date information about a destination, including booking and packaging capabilities; and
- co-locating visitor information services with other facilities such as art galleries, museums and libraries.

Figure 31: Pop-up and Digital VICs⁶²



⁶⁰ Queensland Visitor Information Centres, Snapshot of the year ending September 2017, Tourism and Events Queensland

⁶¹ Total estimated VIC visitors in 2016/17 was 5,105. Total estimated visitation to Campbelltown in 2018 (3-year average to March 2018) was 759k. This equates to an approximate penetration of 0.7%.

⁶² Copenhagen Information Touch Wall, Denmark; ⁶² Copenhagen Information Touch Wall, Denmark; Anglesey Mobile Tourist Information Centre, UK (pictured at cruise port); Arlington Mobile Tourist Centre, USA; Canberra and Region Visitors Centre Pop-up, ACT; and Seattle Space Needle Digital Experience and Information, USA.



7.5. Place activation

7.5.1. Activating the Campbelltown Arts Centre

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓	✓		

The Campbelltown Arts Centre (CAC) is recognised as a leading arts facility in the Western Sydney area. Each year, the CAC attracts 135k visitors for a variety of performances and events, with 30% of these (41k) being from outside the Campbelltown LGA.

While the CAC has a strong reputation, its distance from the Campbelltown CBD – a 10-minute walk⁶³ – has created some challenges in achieving stronger activation and utilisation of the facility.

Opportunities which could be investigated to further activate the CAC include the following.

- Supporting the expansion of the Campbelltown Arts Centre. The CAC has a \$55m expansion plan currently sitting with State Government which includes (amongst other elements) expanding the theatre from 180 seats to 320. This expansion plan should continue to be supported to grow the potential of the CAC.
- Art bike trails starting from/or ending up at the CAC (see Section 7.1.1).
- Increasing the scale of events and exhibition at CAC.
- Establishing an art market, hosted at CAC.
- Attract major exhibitions to CAC (in a similar fashion to those which Bendigo Arts Gallery attracts).
- Leveraging off Campbelltown's strong creative community by having public performance outside the CAC as well as along Queen Street and other key areas.
- Creating a series of outdoor sculpture trails or art trails with the CAC as the destination hub for these.
- Offering a range of nighttime activations which encourage a broader family market to spend time in and around the CAC and which may include artisan markets, smaller scale events and festivals.

⁶³ Based on Google Maps

7.5.2. Activating Queen Street

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓			✓		

While there is a strong desire by Council, industry and community to activate Campbelltown's main street, Queen Street, it is recognised that achieving this will take time and significant investment. To achieve this will require a careful and planned approach. It is recommended that an Urban Renewal Plan be developed to guide Queen Street's activation.

In the meantime, a number of smaller-scale initiatives could be investigated including:

- pop-up shops in currently vacant shops;
- pop-up containers in open space areas along Queens Street;
- events, particularly focused on evening events;
- rooftop activations (if possible) such as pop-up rooftop bars and outdoor cinemas;
- lighting up Queen Street with different forms of lights;
- opportunities for outdoor dining experiences;
- bringing arts and culture, particularly from Campbelltown Arts Centre, into Queen Street through displays, sculptures and live performances; and
- working with major retailers to identify solutions to perceived safety issues.

Figure 32 demonstrates some best practice examples of how similar activations have been achieved elsewhere.

Figure 32: Examples of street activation initiatives



Public Programming in Britomart, Auckland, NZ



Lighting activations in Britomart, Auckland, NZ



Urban farm events space activation, Italy



Street art activation in Águeda, Portugal

Event activation in Bristol Street, UK



Parklet (Pocket Park) Activation, Los Angeles

7.5.3. Leumeah Sports and Entertainment Precinct

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓	✓	✓	✓	✓	✓

Campbelltown Sports Stadium is situated in Leumeah, part of the CBD precinct area of focus in this DMP. While there has long been a desire to upgrade the Stadium to offer a larger professional sporting facility, it is recognised that this cannot be undertaken in isolation; the surrounding precinct needs to be activated concurrently.

Leumeah is, therefore, being positioned as potentially offering a major entertainment and sporting precinct for the broader south west region. Facilities within the precinct could include:

- upgrades to Campbelltown Stadium including:
 - improved spectator seating areas including covered seating;
 - increase seating capacity;
 - upgrades and expansion of hospitality areas;
 - additional change rooms and operational areas;
 - enhanced and addition food and beverage outlets;
 - additional spectator amenities; and
 - improved player and media areas.
- restaurants, tourism attractions/experiences;
- boutique breweries;
- cinemas;
- residential apartments;
- indoor sports;
- hotel accommodation;
- conference centre/convention area;
- markets;
- and other recreational experiences such as a bowling alley and dance studios as well as other activations.

In order to activate the precinct, consideration needs to be given to reassessing the building height permitted along the rail corridor and align this more closely to other major rail corridors in Sydney which State Government has determined are able to handle greater height potential. This also requires greater flexibility in planning controls for

the precinct to encourage private investment into commercial accommodation and other tourism development options.

It is important to note that there is a need to ensure the residential component of Leumeah is also developed to act as a population anchor and increase the vibrancy of the precinct.

7.5.4. Multi-jurisdictional justice precinct on Queen Street

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment	✓		✓			

Although planning documents released by the Greater Sydney Commission focus on health and education, there is limited focus on justice infrastructure and how legal needs will be addressed as residential growth continues to occur in the south west.⁶⁴

Feedback received indicates that court facilities in Campbelltown – which service a much broader area (including Liverpool and Cabramatta) – are often at capacity, with more district court listings at Campbelltown Court than in Parramatta (by way of example). Campbelltown, Camden and Picton courts are apparently “overflowing with matters and are unable to keep up with increased demand”.⁶⁵ There is also currently no Family Circuit Court in the region, with residents and court users having to travel to Parramatta, Wollongong or Sydney to resolve family disputes which adds significant stress and cost to families.

There is a desire by the Macarthur Law Society as well as the Law Society of NSW to develop a new multi-jurisdiction justice precinct within Campbelltown⁶⁶. This could be made up of federal, local and family courts and could leverage off existing legal facilities in Queen Street and its surrounds including Legal Aid, the Department of Public Prosecutions and the Macarthur Community Legal Centre.

While the development of a justice precinct may not be considered a traditional tourism driver, when considering the more holistic visitor economy, the precinct could provide a variety of opportunities for economic growth through higher visitor spend patterns. As outlined previously, a visitor is defined as anyone who travels more than 25km (one way) to a destination for leisure (holiday and VFR), business, education, employment and other purposes. A justice precinct, particularly a multi-jurisdiction one, would attract a niche sector of tourism termed legal tourism.

Feedback from the Macarthur Law Society indicates that local courts can have up to 400 people (lawyers, barristers, victims, perpetrators, family support networks and other staff etc.) visit on any given day. The flow on effects to a CBD, in terms of spend on food and beverage, retail, accommodation and parking as well as for CBD vibrancy are significant. The development of a justice precinct could, therefore, present a valuable opportunity for Council to activate Queen Street.

The development of a family court in the LGA would also:

- act as a catalyst for encouraging a barristers chamber to establish in Campbelltown; and

⁶⁴ <https://www.macarthuradvertiser.com.au/story/4654671/wheres-the-justice-in-planning/>

⁶⁵ <https://www.lawsociety.com.au/advocacy-and-resources/news-and-media/crime-and-courts-overflowing-in-Macarthur>

⁶⁶ Based on discussions with Macarthur Law Society

- act as a mechanism to help address the limited number of white-collar workers in Queen Street and Campbelltown CBD generally.

The justice precinct would ideally need to comprise (but may not be limited to):

- an expanded children's court;
- a family court facility;
- space for a variety of State Government agencies involved in social support;
- space for client briefings, meetings and juror waiting rooms;
- modern technology including Wi-Fi access throughout the precinct; and
- higher quality office accommodation to support the expansion of legal practices and provide space for new ones wishing to have a presence in Campbelltown.

A feasibility study should be undertaken to: demonstrate the gap; determine the requirements of the justice precinct; and the associated capital costs so this can be packaged up and presented to the applicable State and Federal Government agencies for consideration.

7.6. Governance and industry collaboration

7.6.1. Advisory group for tourism (TAG)

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment					✓	✓

Currently, there is no local tourism organisation (LTO) which operators within Campbelltown. Rather than set up another formal committee, a Tourism Advisory Group (TAG) could be established which consists of a really focused group of industry operators and relevant Council staff which can provide Council with feedback, when required, and also to drive specific initiatives of this DMP.

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

The composition of the TAG could include the following stakeholders:

- a Council staff member(s);
- an accommodation sector representative;
- a cultural sector (but who has a tourism-focus) representative;
- an attraction/experience operator;
- an events sector representative;
- a representative of the art gallery/museum sector;
- a cultural tourism Indigenous representative;
- a representative from the Chamber of Commerce; 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 or for digital marketing).

Other points to consider for the TAG include the following.

- Importantly, the Chair of the TAG should be a representative from industry.
- Each non-Council member should have a maximum serving term of 2 – 3 years to ensure continuity is achieved and other tourism industry stakeholders are given the chance to be on the TAG.
- The TAG should meet 4-6 times per year and be focused on monitoring and advising the initiatives outlined in this DMP.
- Council should provide a secretariat and facilitate all TAG meetings.
- To ensure the TAG is communicating with the tourism industry generally, there is a need for regular updates via Campbelltown's destination website.

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

7.6.2. Business development programs and upskilling

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment						✓

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

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

- programs focused on social media and how to correctly utilise the various social media tools available (including what tool is best for specific types of marketing);
- assistance in storytelling and experience development;
- help in clustering and bundling experiences to make itineraries interesting and appealing;
- visibility and assistance in helping to stand out;
- networking with other businesses to understand what is in the area;
- help in participating in additional programs to develop product offering;
- understanding how to value-add to existing product;
- providing the opportunity to network along the value chain to develop relationships with other suppliers.
- training on getting listed on the ATDW to ensure their product is listed on the appropriate state government tourism websites;
- customer service upskilling; and
- programs on understanding the difference between start-up, market ready, accredited and export-ready tourism product (Figure 33).

Figure 33: Market readiness stages



7.6.3. Industry networking sessions

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Goal Alignment						✓

Currently, there is limited collaboration amongst industry operators within the tourism sector. The opportunity exists to set up quarterly industry networking events where:

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

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



CAMP

BELL

TOWN

ARTS

CENTRE

8. Catalyst Projects

8.1. The catalyst projects

The priority catalyst projects (Table 8)⁶⁷ are provided to help create a strong focus and prioritisation of tasks. They are also noted as projects which can act as the catalyst to help stimulate other projects to be activated as well. These game changer projects are noted as the following.

- A larger, branded accommodation property offering 120+ rooms situated within the CBD precinct.
- Continuing to develop Leumeah as a sports and entertainment precinct:
 - offering a range of activities to activate the precinct even when sporting events are not held;
 - to increase national/international visitation and events; and
 - to provide overnight stay opportunities within the precinct.
- A multi-jurisdictional justice precinct to capitalise on a significant gap and the flow-on economic benefits able to be generated from this niche tourism market.
- A high-quality destination holiday park leveraging off Campbelltown's strategic position in South West Sydney and on major transport corridors.
- A major eco-adventure experience in the Australian Botanic Garden such as a luge experience, an aerial experience (which could incorporate a number of zip lines) or a number of other experiences.
- An investment memorandum to profile these catalyst opportunities (as well as other potential opportunities) to potential investors so the investment and development community nationwide is better informed of what Campbelltown has to offer.

These projects are referred to as “game changers” because of their potential to have a major impact on Campbelltown's visitor economy through: increased visitor yield, growing the visitor average length of stay, shifting visitation from day trips to overnight and the generation of new investment into Campbelltown.

Table 8: The priority projects and alignment with DMP goals

	GOAL 1 CBD Activation	GOAL 2 Diversify Offer	GOAL 3 Leverage Niches	GOAL 4 Grow Events	GOAL 5 Marketing	GOAL 6 Governance
Leumeah Sports and Entertainment Precinct	✓	✓	✓	✓	✓	✓
New branded accommodation property	✓	✓		✓	✓	✓
Multi-jurisdictional justice precinct on Queen Street	✓		✓			
High-quality destination holiday park		✓			✓	
Major eco-adventure activity		✓	✓	✓	✓	
Investment memorandum						✓

⁶⁷ These were selected after presentation and discussions with Councillors, council personnel, industry operators and independent assessment by the consultant team.

8.2. Visitor forecasts

The implementation of the catalyst project initiatives (as well as a number of smaller-scale opportunities noted in this DMP) is likely to drive greater visitation to Campbelltown, greater visitor spend, as well as a shift in the types of visitors coming to the LGA (i.e. increased overnight visitation). Figure 34 provides forecasts to Campbelltown based on a status quo scenario (that is, a do-nothing scenario) and a high growth scenario (that is, a scenario in which the catalyst projects are implemented).

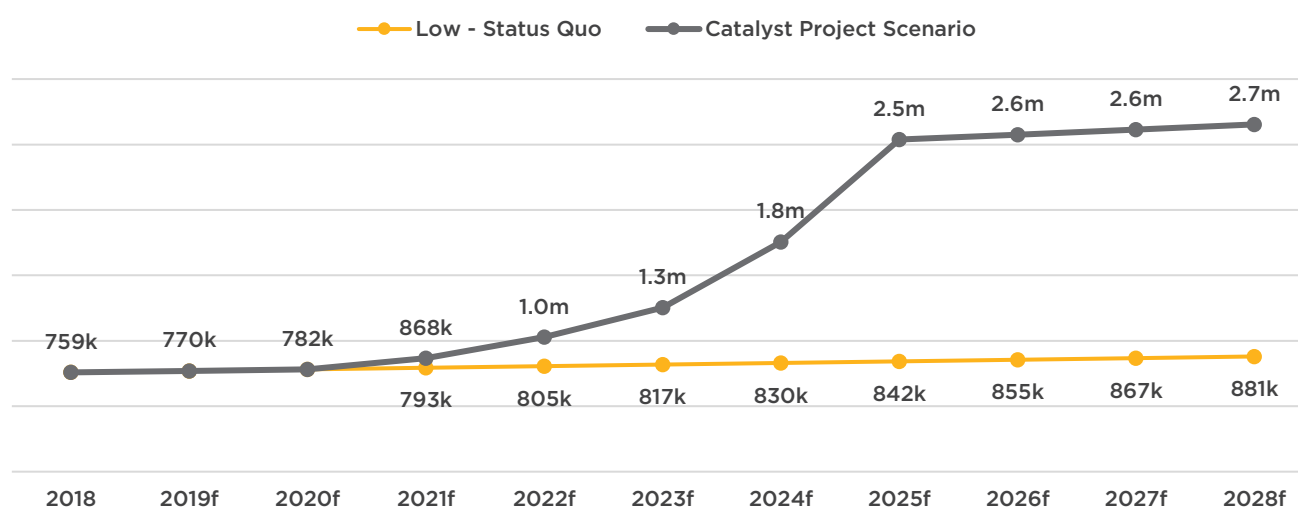
Under the low growth scenario, visitation is anticipated to grow by 16% (122k visitors) over a 10-year period assessed. This level of growth reflects natural growth in visitation to Campbelltown with minimal new product development or new marketing initiatives.

Under the high growth scenario, visitation is anticipated to grow by 250% (or 1.9m visitors), increasing from 759k in 2018, to 2.7m by 2028. This high growth scenario assumes the introduction of a destination holiday park in 2021, the activation of the Leumeah Sports and Entertainment Precinct in 2022, a new branded hotel in 2023, the major eco-adventure experience in 2024 and the justice precinct by 2025.

Of these 2.7m visitors in 2028 under the high growth scenario, 33% (881k) are estimated to be “status quo” visitors (i.e. those who would have visited Campbelltown regardless of the catalyst projects being implemented). The remaining 67% (1.8m visitors) are forecast to visit specifically because of the introduction of the catalyst experiences.

The projects included as catalyst projects generate a significant uplift in visitation to Campbelltown because they have the ability to cater for large numbers of visitors. The destination holiday park and the new hotel are both assumed to be larger properties (120+ rooms for the hotel and 225 total holiday park sites) and the major eco-adventure experience has a high throughput being able to cater for 2,000+ people per day. The justice precinct and Leumeah Sports and Entertainment Precinct are also anticipated to be a major generator of visitors to the CBD precinct.

Figure 34: Visitation forecasts (2018 – 2028)⁶⁸



⁶⁸ Based on historic visitation trends and Stafford estimates for uplift based on the implementation of the catalyst projects.

Figure 35 illustrates estimated visitor forecasts to the CBD precinct only over the period 2018-2028. This demonstrates the significance of the CBD as a major destination within Campbelltown. Under the low growth scenario, visitation to the CBD is forecast at 726k visitors by 2028. The high growth scenario, which sees the adoption of the catalyst projects staged over various years, sees 1.5m more visitors visiting Campbelltown CBD.

Figure 35: Visitation forecasts to the CBD precinct (2018 - 2028)⁶⁹

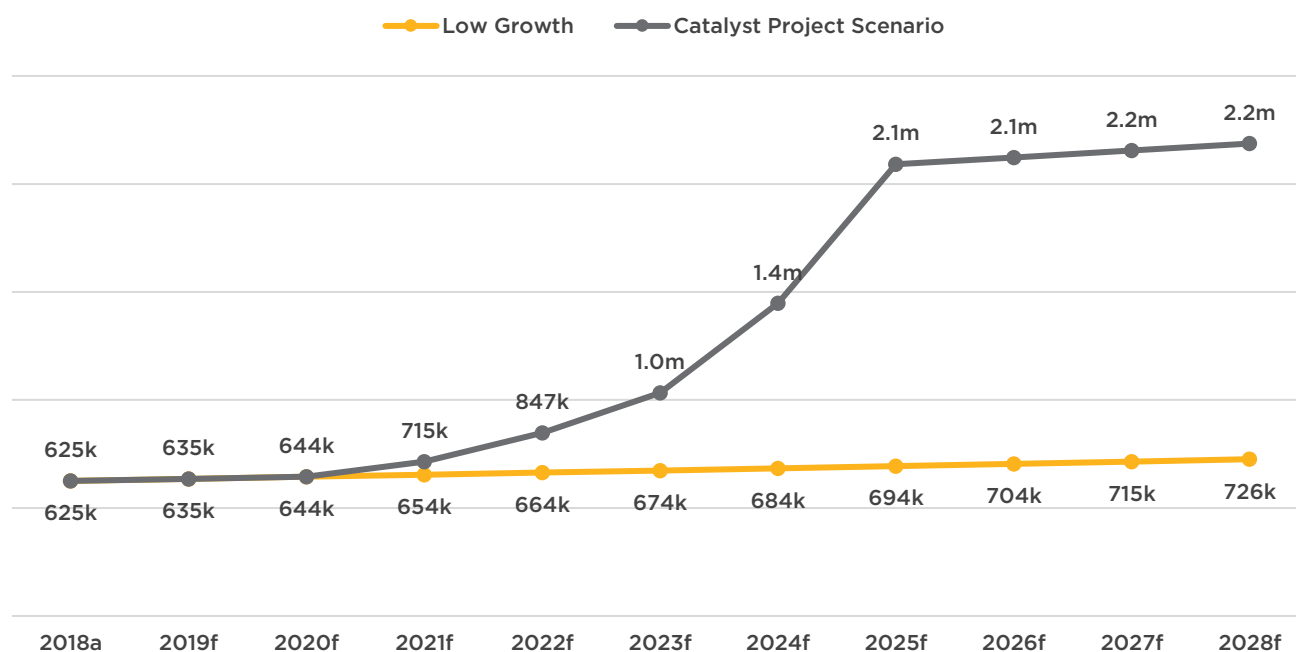


Table 9 on the following page provides a detailed breakdown of visitation to Campbelltown LGA by market type. It demonstrates that while under the status quo (low) scenario the types of visitors coming to Campbelltown is anticipated to remain constant (i.e. the day trip market will continue to dominate the visitor mix at approximately 76% of visitation), the high growth scenario sees an uplift in overnight visitation. This uplift sees domestic overnight visitation increasing from comprising 21% of total visitation to 28% by 2023.

⁶⁹ Based on historic visitation trends and Stafford estimates for uplift based on the implementation of the catalyst projects.

Table 9: Visitor type forecasts (2018-2027)⁷⁰

	2018	2019f	2020f	2021f	2022f	2023f	2024f	2025f	2026f	2027f	2028f
Low - Status Quo											
International %	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
Domestic O/night %	21%	21%	21%	21%	21%	21%	21%	21%	21%	21%	21%
Domestic Day %	76%	76%	76%	76%	76%	76%	76%	76%	76%	76%	76%
Total Visitors	759k	770k	782k	793k	805k	817k	830k	842k	855k	867k	881k
International	26k	26.8k	27.2k	27.6k	28.0k	28.4k	28.8k	29.3k	29.7k	30.2k	30.6k
Domestic O/night	159k	161k	164k	166k	169k	171k	174k	176k	179k	182k	185k
Domestic Day	573k	582k	591k	600k	609k	618k	627k	636k	646k	656k	665k

High Growth				*	**	***	****	*****			
International %	3%	3%	3%	3%	3%	4%	4%	4%	4%	4%	4%
Domestic O/night %	21%	21%	21%	25%	25%	28%	28%	28%	28%	28%	28%
Domestic Day %	76%	76%	76%	72%	72%	69%	68%	68%	68%	68%	68%
Total Visitors	759k	770k	782k	868k	1.0m	1.3m	1.8m	2.5m	2.6m	2.6m	2.7m
International	26k	27k	27k	30k	36k	44k	70k	101k	103k	105k	106k
Domestic O/night	159k	161k	164k	217k	257k	351k	492k	710k	721k	732k	743k
Domestic Day	573k	582k	591k	621k	735k	859k	1.2m	1.7m	1.8m	1.8m	1.8m

* 2021: Holiday Park

** 2022: Leumeah Sports & Entertainment Precinct

*** 2023: New branded hotel property (120+ rooms)

**** 2024: Eco-adventure experience

***** 2025: Justice precinct

It is important to note that the ability to generate stronger levels of both day and overnight visitation is predicated on introducing new tourism-related products and experiences. If these products are not pursued on a timely basis, there is a risk that other areas within Western Sydney pick up and run with them.

There is, therefore, a need for Council to proactively champion the product opportunities, especially the game changers, if a far stronger visitor economy is desired, along with associated benefits through greater local employment and broader investment to benefit the local community.

⁷⁰ Based on historic visitation trends and Stafford estimates for uplift based on the implementation of the catalyst projects.



9. Implementation Plan

This section provides the implementation plan to assist Council and industry in delivering the various initiatives identified in this DMP. Importantly, it highlights specific actions, the various tasks required, the primary organisation responsible, an indicative time frame, an estimate only of the budget required (where possible) and a series of key performance indicators.

The timeframe included covers:

- Short term: 2019 – 2020 (calendar years);
- Medium term: 2021 – 2022 (calendar years); and
- Long term: 2023 and beyond.

It is important to note that the budget estimates are purely indicative to assist Council in allocating a level of resource to deliver the specific action identified and, where required, to determine if funding support from the NSW State Government is required.

Table 10: Action Plan (The Catalyst Projects)

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Activating the Australian Botanic Garden – Major eco-adventure experience	<ul style="list-style-type: none"> Complete feasibility assessment on the potential for a major eco-adventure experience in the region, including site assessment, preferred models, demand assessment, and financial modelling If proven viable, develop an investment prospectus for the attraction to showcase the region and the attractions potential If proven viable, undertake discussions with experienced operators to ascertain interest If the model is not viable, commission assessment into other major attractions which could be developed (preferably eco or nature-based) 	Australian Botanic Garden and Council	Short-longer term	\$25k for a feasibility study	<ul style="list-style-type: none"> Feasibility commissioned and completed by 2019 Investment prospectus developed by 2020 Potential operators to be identified by 2020 Discussions with operators to take place by 2021 If viable and operator interest exists, development to take place by 2023
Destination holiday park	<ul style="list-style-type: none"> Undertake site assessment for potential locations Commission specialist to undertake feasibility on destination holiday park (using site assessment information) If feasibility demonstrates viability, develop an investment prospectus and liaise with potential operators to determine interest. 	Council	Short-medium term	\$15k for feasibility assessment	<ul style="list-style-type: none"> Site assessment commissioned and completed by March 2019 Feasibility undertaken by late 2020 If viable, investment prospectus developed by 2020 Investment prospectus distributed to potential operators by 2021 Development of holiday park to commence by mid-late 2023 if proven viable
Investment memorandum	<ul style="list-style-type: none"> Commission a specialist to create a succinct quality document which highlights the various investment opportunities in this DMP and to use this to market tourism development potential for Campbelltown Facilitate a tourism development investment forum in the LGA to further profile and support new investment Ensure that appropriate zoning for locations suitable for tourism/event infrastructure and development should be incorporated into the next phase of the Re-imagining Campbelltown CBD project. 	Council	Short term-ongoing	\$25k for the investment prospectus	<ul style="list-style-type: none"> Investment prospectus is finalised by 2019 Investment prospectus is published and provided online by late 2019 Tourism development investment forum held by early 2020 Tourism investment interest and actual investment into the region continues to grow Zoning for tourism/event infrastructure and development are incorporated into the next phase of the Re-imagining Campbelltown CBD project
Leumeah Sports and Entertainment Precinct	<ul style="list-style-type: none"> Undertake an assessment of permissible building heights along the rail corridor at Leumeah Continue to work with major players to develop the precinct as a major entertainment and sporting precinct Continue to support expansion of Campbelltown Stadium as a major facility for South West Sydney 	Council and major landowners	Short term-ongoing	TBD as part of the Re-Imagining Campbelltown CBD Masterplan	<ul style="list-style-type: none"> Undertake assessment by late 2019 Continue to showcase the project to government agencies and apply for grant funding applications where possible Continue to lobby State Government for positioning of Campbelltown Stadium as part of NSW's Stadium Strategy going forward

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
	<ul style="list-style-type: none"> Identify potential grant programs which could be applied to for activating the opportunities 				
Multi-jurisdictional justice precinct on Queen Street	<ul style="list-style-type: none"> Commission specialist to undertake a feasibility study on the need for the justice precinct and why Campbelltown is the ideal location for this 	Council and Macarthur Law Society	Short term-ongoing	\$25k for feasibility	<ul style="list-style-type: none"> Specialist commissioned by mid-2019 Feasibility study completed by late 2019
New branded accommodation property	<ul style="list-style-type: none"> Identify if a fast track planning approval process is possible to avoid unnecessary delays Ensure this opportunity is profiled in the tourism investment memorandum, with reference to specific sites which can be activated for commercial accommodation Liaise with major accommodation operators/developers to ascertain interest 	Council	Short-medium term	n/a	<ul style="list-style-type: none"> Assess fast-track planning potential by 2019 Incorporate opportunity into investment memorandum Initiate discussions with accommodation operators/developers by 2020

Table 11: Activation Area: Product and infrastructure development

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Art bike trails	<ul style="list-style-type: none"> Complete assessment looking at the establishment of art bike trails linking with CAC and other sites of significance Identify potential grant programs which could support the implementation 	Council and CAC	Medium term	n/a	<ul style="list-style-type: none"> Assessment is completed by 2020
Activating the Australian Botanic Garden: southern access to the Garden, large public event site, light show and southern access to the Garden	<ul style="list-style-type: none"> Work with the Australian Botanic Garden to assess their interest in and the feasibility of each of the opportunities identified Identify potential grant programs which could be applied to for activating the opportunities 	Council and Australian Botanic Garden	Short-Medium term	\$20k for feasibility	<ul style="list-style-type: none"> Discussions held with the Australian Botanic Garden by 2019 Feasibility of opportunities assessed by 2020 Continue to showcase the project to government agencies and apply for grant funding applications where possible
George's River Recreation Trail	<ul style="list-style-type: none"> Undertake assessment to identify mechanisms for enhancing the proposed trail to activate it for tourism and the investment required for this Identify potential grant programs which could support the implementation 	Council	Short-medium term	n/a	<ul style="list-style-type: none"> Assessment undertaken by 2020 Council to continue to showcase the project to government agencies and apply for grant funding applications where possible
Haunted attraction	<ul style="list-style-type: none"> Complete updated site assessment (public and private) for such an attraction Identify if a fast track planning approval process is possible Liaise with potential operators, such as Spookers, once sites have been identified etc. 	Council and potential haunted attraction operators	Short-medium term	n/a	<ul style="list-style-type: none"> Complete updated site assessment by 2019 Assess fast-track planning potential by 2019 Identify potential operators by 2019/20 Initiate discussions with potential operators by 2020

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Indigenous cultural hub and product development	<ul style="list-style-type: none"> Commission specialist to work with Council and Campbelltown's Indigenous community to investigate the feasibility of an Indigenous cultural tourism hub Look to leverage off existing indigenous art based activity including via the Campbelltown Art Centres existing programs 	Council in partnership with Campbelltown's Indigenous community	Medium-long term	\$25k for feasibility	<ul style="list-style-type: none"> Complete feasibility study by 2020 If feasible, investigate grant programs which could be accessed for the project by 2020/21 Look to leverage further off the indigenous arts-based Indigenous programs run through the Campbelltown Art Centre, commencing 2019/2020
Interpretive and directional signage	<ul style="list-style-type: none"> Commission a signage specialist to complete an audit and develop a regional signage strategy to: consolidate tourism-related signage, improve interpretation signage (where needed) and to identify mechanisms/the process to increase directional signage (aligning to NSW State Government guidelines) Identify potential grant sources which could be applied to fund implementation of the signage strategy Develop a signage guide, instructing operators how they can apply for signage, the criteria they need to fulfil and the assistance programs available Identify potential grant programs which could be applied to for activating the opportunities 	Council	Medium term - ongoing	\$20k for strategy Approximately \$500 p/smaller reskinned sign, \$1500 p/larger reskinned sign and \$3k p/new sign (implementation)	<ul style="list-style-type: none"> Commission and complete study by 2021 Seek matching funding commitment by 2021 Once funding has been secured, rollout signage program The guide is developed and distributed by 2021 The guide is updated - when appropriate - to adhere to changes in rules/regulations
Medical and wellness tourism	<ul style="list-style-type: none"> Develop a medical tourism strategy which investigates strategies to position Campbelltown as a medical tourism destination and activations required to achieve this (such as new accommodation, conferencing facilities etc.) 	Council (with input from Campbelltown's health/medical institutions)	Medium term	\$20k for strategy	<ul style="list-style-type: none"> Complete strategy by 2021 Implement initiatives by 2022
National park experiences	<ul style="list-style-type: none"> Continue to profile guided tours of Dharawal National Park (offered by NPWS) 	Council and NPWS	Ongoing	n/a	<ul style="list-style-type: none"> Continue to profile experiences through Campbelltown's new destination website
Zoning for tourism	<ul style="list-style-type: none"> Work with Council's planning team to ascertain whether it can be specified in current LEP and DCPs where tourism development is a preferred land use, as opposed to a possible land use Work with Council's planning team to provide greater specificity for how Council wants to activate its night time economy and specifically along Queen Street and in Leumeah sports and entertainment precinct 	Council	Short term-ongoing	n/a	<ul style="list-style-type: none"> Undertake discussions with Council's planning team by 2019 Assess potential to update the LEP and DCP to reflect specific types of tourism to be encouraged and areas where it should be located, as a preference, by 2020

Table 12: Activation Area: Accommodation

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Health and wellness retreat	<ul style="list-style-type: none"> Work with local property specialists to identify potential sites for a health and wellness spa Liaise with local landowners on the level of interest to sell or lease land (if no appropriate Council-owned/managed sites are able to be identified) Work with development companies and investors with experience in higher end eco-lodges, to link landowners and investors 	Council and landowners	Medium-long term	\$15k for feasibility	<ul style="list-style-type: none"> Identify potential sites (Council owned and private) by 2021 Liaise with landowners by 2021 If viable, aim to have a development application in front of Council by 2022 Development to commence by 2023

Table 13: Activation Area: Events

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Civic events space with pop-up programming	<ul style="list-style-type: none"> Investigate potential preferred locations for the civic events space and options for activation (permanent and temporary) Ensure planning for the civic events space is incorporated into the CBD Masterplan as part of phase 2 of the Re-imagining Campbelltown CBD project Identify potential grant programs which could be applied to for activating the opportunity 	Council	Medium-longer term	n/a	<ul style="list-style-type: none"> The preferred site for the civic events space is identified by 2019 Activation opportunities are identified by 2019 Planning for this civic space is incorporated into the next phase of the Re-imagining Campbelltown CBD project
Destination event strategy	<ul style="list-style-type: none"> Commission a specialist to create a Destination Events Strategy to assess current events, gaps and the potential for creating a new (or growing an existing) signature destination event for Campbelltown 	Council	Short-medium term	\$15k for strategy	<ul style="list-style-type: none"> The strategy is completed by late 2019
Event toolkit and event gateway	<ul style="list-style-type: none"> Create an events toolkit for Campbelltown (look to apply elements of the successful Wollongong City Council event toolkit) Create event gateway process to support prospective event organisers from planning to promotion stage of their event 	Council	Short term	\$5k-\$10k for toolkit development and marketing	<ul style="list-style-type: none"> Events toolkit is created by late 2019 Ensure that toolkit is accessible online through Council's and the new destination website Ensure that a standard format is applied to all event applications, so Council can easily assess any request for funding Event gateway is established and operational by late 2019
Queen Street Music festival	<ul style="list-style-type: none"> Work with Campbelltown's music and creative community to investigate the potential for Queen Street Music Festival and potential themes (as well as other locations which could be considered for satellite events) 	Council (working with Campbelltown's music community)	Medium term	n/a	<ul style="list-style-type: none"> Hold workshops with Campbelltown's music/creative community by 2020 Music festival potential identified by 2020/21 If the concept is feasible, develop potential event program/strategy by 2021
Regional sporting events hub	<ul style="list-style-type: none"> Create a sporting event toolkit to demonstrate the facilities available in the region 	Council	Medium term	\$5k-\$10k for toolkit	<ul style="list-style-type: none"> Sporting event toolkit developed by 2019

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
	<ul style="list-style-type: none"> Continue to promote the region as a sporting event destination to host major state and national, senior and junior sporting events, leveraging off the sporting event toolkit and continue to update toolkit as upgrades to facilities and new accommodation product etc. comes online Run visiting journalist programs to showcase the region as a sporting destination Work with accommodation and food and beverage operators to develop packages 			development and marketing	<ul style="list-style-type: none"> Awareness of the region as a sporting destination increases and the number of sporting events held grows Number of media releases/articles about the region increases Operators begin to target sporting events and work together to create packages

Table 14: Activation Area: Destination Marketing

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
ATDW awareness program	<ul style="list-style-type: none"> Work with DNSW to produce a list of all ATDW-listed operators in the region Use accommodation and product audit in this DMP and determine who is/is not listed on the ATDW Develop a short sell document which demonstrates to industry operators the benefits of being listed on the ATDW and the strong ROI able to be generated Invite ATDW representatives and/or State tourism representatives to come to speak about the benefits of the ATDW 	Council and industry	Ongoing	\$5k for marketing and assistance	<ul style="list-style-type: none"> The list is developed by 2020 (and updated on an ongoing basis) Audit completed by 2020 and reviewed on a quarterly basis Sell document developed by 2021 Document distributed (via social media, Campbelltown's new destination website and in print) by 2021 ATDW listed product for the region increases The workshop is held by 2021 and occurs annually every year thereafter
Community pride campaign	<ul style="list-style-type: none"> Create a community pride campaign that encourages the host community to be strong advocates for Campbelltown 	Council and community	Short-medium term	\$10k for marketing	<ul style="list-style-type: none"> Identify potential advocates who could lead the campaign such as sports people, entrepreneurs, chefs, musicians etc. by 2019 Develop and roll out community pride campaign by 2020
Destination brand for Campbelltown	<ul style="list-style-type: none"> Ensure destination branding for Campbelltown is considered as part of the City Branding work Council is currently completing 	Council	Short term	n/a	<ul style="list-style-type: none"> Work with the current city branding developers to ensure destination branding is considered
Destination website for Campbelltown	<ul style="list-style-type: none"> Continue to develop the updated destination website for Campbelltown and ensure content is kept updated Promote the new destination website as Campbelltown's primary website for all tourism-related information about Campbelltown 	Council and industry	Ongoing	\$2k for workshops p/a	<ul style="list-style-type: none"> Have an official launch function for the destination website and invite industry to garner stronger buy-in Ensure content is kept updated on an ongoing basis Host bi-annual workshops (post website launch) with industry to outline how they can be listed on the new website

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Packaging of product	<ul style="list-style-type: none"> Host industry networking session to gauge interest in operators working together to develop bookable product packages for the region Once one bookable package is identified, continue to work with operators to have product potentially listed on Campbelltown's new destination website and other appropriate collateral Measure success (booking rate) of the bookable package and look to introduce other packages 	Council and industry	Ongoing	\$2.5k for marketing	<ul style="list-style-type: none"> Industry networking session is held by 2021 Interest in product package is demonstrated The first bookable package is coordinated and developed by 2021 The bookable package is listed on Campbelltown's new destination website The package is booked by visitors to the region As new packages are rolled out, the number of packages booked grows
Visitor economy community awareness campaign	<ul style="list-style-type: none"> Engage an appropriate firm to develop the metrics to explain how the visitor dollar filters through the local economy so all members of the community better understand the benefits and opportunities. Work with the Chamber of Commerce to promote the benefits of the visitor 	Council and Chamber of Commerce	Ongoing	\$20k for the creation of awareness campaign	<ul style="list-style-type: none"> The campaign is rolled out by 2020 Distribute community awareness campaign to Chambers and initiative discussions by 2020 The campaign is updated on an annual basis Community awareness of the importance of the visitor economy grows
Visitor information services strategy	<ul style="list-style-type: none"> Commission specialist to undertake a review of visitor information services for Campbelltown 	Council	Short-medium term	\$15k for strategy	<ul style="list-style-type: none"> The review is completed by 2020 Begin to implement findings once Plan is finalised Councils ROI into visitor servicing increases

Table 15: Activation Area: Place activation

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Activating the Campbelltown Arts Centre	<ul style="list-style-type: none"> Continue to advocate for CAC's expansion plan Investigate additional opportunities listed in this DMP to activate the CAC 	Council and CAC	Ongoing	n/a	<ul style="list-style-type: none"> Funding is received for the CAC's expansion plan Opportunities for further activation are assessed by 2020
Activating Queen Street	<ul style="list-style-type: none"> Investigate shorter-term and smaller-scale initiatives listed in this DMP to activate Queen Street Commission the development of an Urban Renewal Plan for Queen Street to identify longer-term revitalisation opportunities for Queen Street. This should take into account major projects currently being completed by Council including Re-imagining Campbelltown CBD and the HEP. 	Council	Short-long term	n/a	<ul style="list-style-type: none"> Investigate smaller-scale initiatives to activate Queen Street by 2019/2020 Commission an Urban Renewal Plan for Queen Street by 2021

Table 16: Activation Area 4: Governance and industry collaboration

Action	Tasks	Responsibility	Timeframe	Budget Estimate	KPIs
Advisory group for tourism (TAG)	<ul style="list-style-type: none"> Establish an informal tourism body to deliver a consolidated view of industry requirements and to support Council to implement initiatives identified in this DMP 	Council and industry	Short term	\$4k per year (includes costs for 4-5 meetings per year)	<ul style="list-style-type: none"> Develop Terms of Reference for the TAG and invite tourism industry operators to apply to be on the TAG Develop a Memorandum of Understanding for the TAG to follow, and to encourage industry to create an appropriate group by 2019 Provide initial administrative support to ensure it establishes and operates effectively by 2019
Business development programs and upskilling	<ul style="list-style-type: none"> Actively promote and encourage industry to participate in professional development events/courses being held by DNSW as well as other relevant tourism training bodies 	Council and industry	Short term-ongoing	\$5k for marketing and assistance	<ul style="list-style-type: none"> Work with industry operators to determine the specific skills (website development, digital marketing, being export ready, getting listed on the ATDW etc.) they need support with by 2019 Liaise with DNSW/other appropriate training organisations to identify training programs which could be leveraged by 2019.
Industry networking sessions	<ul style="list-style-type: none"> Host 3-4 industry networking events per annum 	Council and industry	Short term-ongoing	\$5k p/a for sponsorships and networking information events	<ul style="list-style-type: none"> Determine a regular series of 3-4 networking events per annum for Campbelltown operators and those supporting organisations by 2019. Encourage industry to coordinate a series of industry networking events with the support of Council on an ongoing basis by 2019. Assess the success of industry networking activity by 2020. Encourage any enhancements to improve the active involvement of industry members on an ongoing basis.



10. Supporting Documentation

Supporting Documentation 1: Product Audit Findings

Table 17: Full product audit findings

Category	Name	Predominantly free or paid?
Arts, Culture & Heritage	Campbelltown Heritage Precinct	Free
Arts, Culture & Heritage	Soldiers Settlement Museum	Free
Arts, Culture & Heritage	Dredges Cottage	Free
Arts, Culture & Heritage	HMAS Sydney Memorial	Free
Arts, Culture & Heritage	Freres Crossing Reserve	Free
Arts, Culture & Heritage	Wat Pa Buddharingsee	Free
Arts, Culture & Heritage	Glenalvon House	Free
Arts, Culture & Heritage	Campbelltown Arts Centre	Free
Arts, Culture & Heritage	Campbelltown Art & Crafts Society	Free
Arts, Culture & Heritage	Campbelltown & Airds Historical Society Inc.	Free
Arts, Culture & Heritage	Japanese Gardens and Teahouse	Free
Arts, Culture & Heritage	Quondong Cottage Historic Property	Free
Arts, Culture & Heritage	The Campbelltown Steam & Machinery Museum	Paid
Arts, Culture & Heritage	Menangle House Historic Property	Paid
Clubs	Club Menangle	Free
Clubs	Campbelltown Catholic Club	Free
Clubs	Western Suburbs League Club Leumeah	Free
Clubs	Campbelltown RSL	Free
Entertainment	Campbelltown Visitor Information Centre	Free
Entertainment	Macarthur Square Shopping Centre	Free
Entertainment	Kingpin Bowling Macarthur Square	Paid
Entertainment	Campbelltown Town Hall Theatre	Paid
Entertainment	Dumaresq Street Cinema	Paid
Entertainment	Event Cinemas Campbelltown	Paid
Entertainment	The CUBE Entertainment Centre	Paid
Entertainment	Bicycle Education and Road Safety Centre	Paid
Entertainment	Campbelltown City Bowling Club	Paid
Entertainment	Kids Kingdom	Paid
Entertainment	Mega Mini Golf	Paid
Entertainment	Lollipop's Playland & Cafe	Paid
Entertainment	Monkey Mania Campbelltown	Paid
Entertainment	Oz Funland	Paid
Entertainment	Campbelltown Rotary Observatory	Paid
Entertainment	Fastlane Karting Sydney	Paid
Entertainment	Eat Shop Love Markets	Paid
Entertainment	Archer Combat Sports	Paid
Food Experience	The Beer Shed	Paid
Market	Aussie Night Markets - Menangle	Free
Market	Waminda Craft Markets	Free
Market	Boot Hill Markets	Free

Category	Name	Predominantly free or paid?
Market	Macarthur Night Markets	Free
Market	Ingleburn Market	Free
Market	Bradbury Market on the Parkway	Free
Market	Menangle Markets	Free
Natural Areas & Parks	O'Hares Creek lookout and track	Free
Natural Areas & Parks	Freres Crossing Reserve	Free
Natural Areas & Parks	Keith Longhurst Reserve	Free
Natural Areas & Parks	Simmo's Beach	Free
Natural Areas & Parks	Dharawal National Park	Free
Natural Areas & Parks	Koshigaya Park	Free
Natural Areas & Parks	Sculpture Garden	Free
Natural Areas & Parks	Jingga Pool	Free
Natural Areas & Parks	Ingleburn Reserve	Free
Natural Areas & Parks	Marsden Park Park Central	Free
Natural Areas & Parks	Ingleburn Weir	Free
Natural Areas & Parks	The Australian Botanic Garden	Free
Natural Areas & Parks	Pembroke Park	Free
Recreation	Campbelltown Liverpool Districts Pistol Club	Paid
Recreation	Campbelltown Indoor Soccer Arena	Free
Recreation	Macquarie Fields Fitness & Indoor Sports Centre	Paid
Recreation	Scenic NSW Horse Riding Centre	Paid
Recreation	The Gordon Fetterplace Aquatic Centre	Paid
Recreation	Campbelltown Skate Park	Free
Recreation	Korrupt Indoor Skatepark & Pro-Scooter Store	Paid
Recreation	St Helens Park Skate Park	Free
Recreation	Macquarie Fields Skate Park	Free
Recreation	Campbelltown Golf Club	Paid
Recreation	Eschol Park Sports Complex	Free
Recreation	Campbelltown Athletics Centre	Paid
Recreation	Campbelltown Sports Stadium	Paid
Recreation	Macquarie Fields Leisure Centre	Paid
Recreation	Macquarie Road Reserve Bike and Triathlon Track	Free
Recreation	Macquarie Links International Golf Club	Paid
Recreation	Minto Indoor Sports Centre (NSW Basketball)	Free
Recreation	National Indoor Sports - Campbelltown	Paid
Recreation	Macarthur Grange Country Club Golf Course	Paid
Recreation	10B Mountain Bike Cycle Trail	Free
Recreation	10T Management Trail (walking)	Free
Recreation	Sugarloaf Horse Centre	Paid
Recreation	Jingga Walking Track	Free
Recreation	Balloon Aloft	Paid
Recreation	Battlefun Laser Skirmish	Paid
Recreation	Eagle Vale Central	Free
Recreation	Apex Park Cycleway	Free
Recreation	Coronation Park Cycleway	Free
Recreation	Park Central Cycleway	Free
Recreation	Raby Sports Complex	Free
Tours	Campbelltown Heritage Tours	Paid

Category	Name	Predominantly free or paid?
Tours	Made in Macarthur Boutique Food and Wine Tours	Paid
Tours	Nature Stories Photography Trail Guided Tour	Paid
Tours	c Tours	Free
Tours	Australian Botanic Garden Tours	Paid
Tours	Campbelltown Historical Ghost Tours	Paid
Tours	Australian Photography Tours	Paid
Tours	Dharawal Guided Indigenous Tours	Paid
Tours	Sydney Investigative Ghost Tours	Paid

