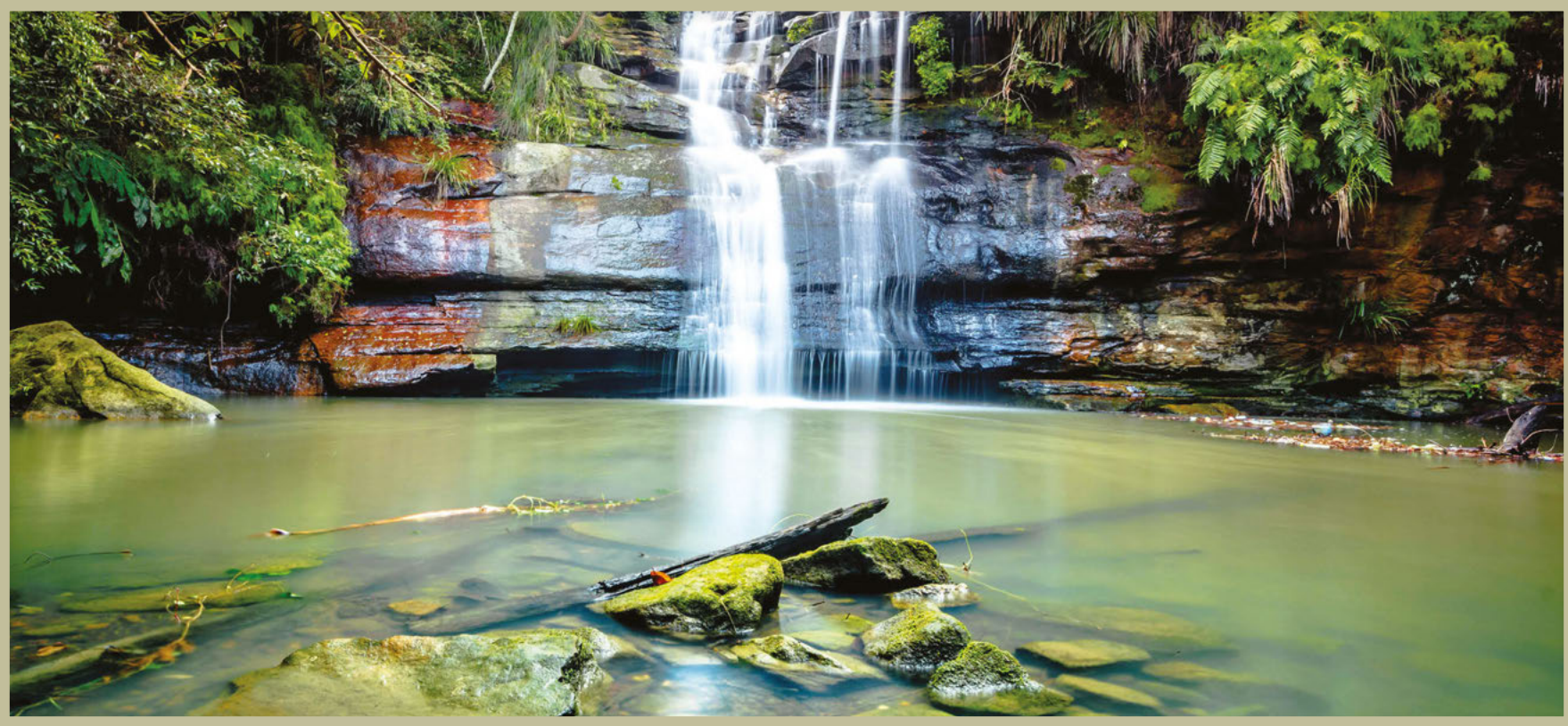


Ku-ring-gai Destination Management Plan 2017 to 2020

23 June 2017



Prepared by Dr Meredith Wray & Stephen Bargwanna



Disclaimer

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any specific recommendations should be analysed and appropriate due diligence undertaken prior to making any investment decisions.

In the course of our preparation of the Ku-ring-gai Destination Management Plan 2017 to 2020, recommendations have been made on the basis of assumptions, methodology and information provided by many sources. The authors accept no responsibility or liability for any errors, omissions or resultant consequences including any loss or damage arising from reliance on the information contained in this report.





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The consultants wish to thank the Ku-ring-gai Council and staff, and members of a Steering Committee that was established to guide and inform the development of the Plan.

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KU-RING-GAI COUNCIL DMP STEERING COMMITTEE

- Councillor Jennifer Anderson – Mayor
- Janice Bevan – Director, Community
- Mark Taylor – Manger, Community and Recreation Services
- Patrick Corrigan – Coordinator St Ives Precinct
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ACRONYMS

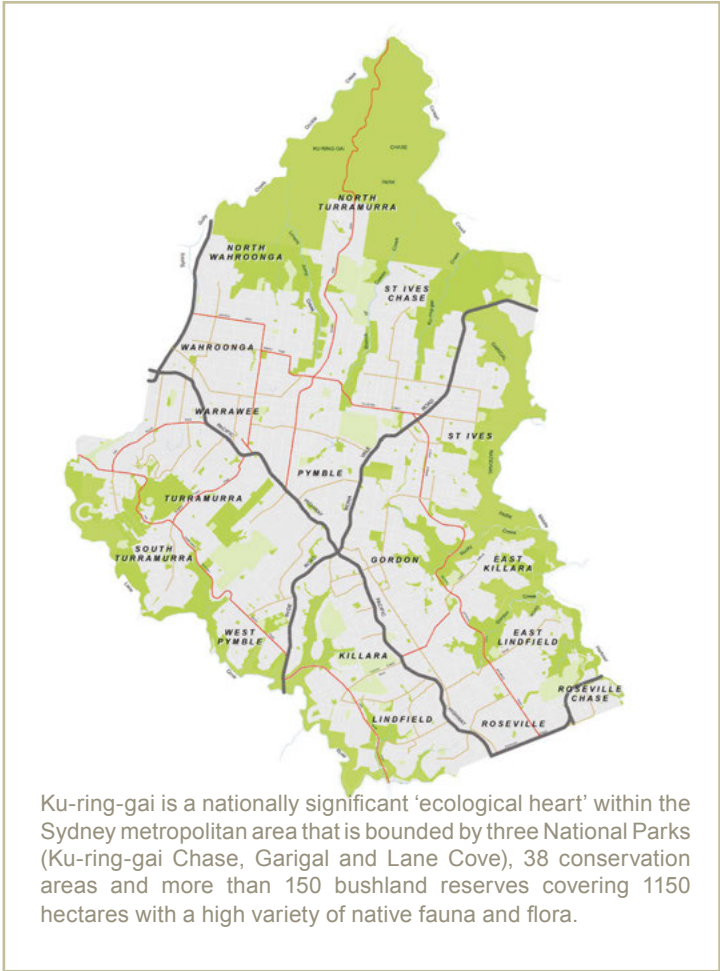
AHO	Aboriginal Heritage Office
DMP	Destination Management Plan
KDMP	Ku-ring-gai Destination Management Plan
DNSW	Destination New South Wales
LGA	Local Government Area
NPWS	National Parks & Wildlife Service
RMS	Roads and Marine Services
VFR	Visiting Friends and Relatives





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Executive Summary

This Plan has been developed to provide strategic direction for Council to plan for the sustainable management, development and marketing of tourism in Ku-ring-gai over the next four-years to 2020. In developing this Plan careful consideration has been given to ensure that the development and promotion of tourism celebrates and protects Ku-ring-gai's distinctive natural and built environments whilst providing benefits for the local community.

Importantly, the Plan identifies key catalyst opportunities that have the potential for Ku-ring-gai to gain competitive advantage in the Sydney tourism market place.

The following summarises key outcomes of the strategic tourism planning process:

1. WHY SHOULD KU-RING-GAI COUNCIL HAVE A TOURISM DESTINATION MANAGEMENT PLAN?

- Council has policy commitments to diversify the local economy to include tourism
- Tourism is recognised a leading growth sector for Australian and Sydney economies
- Tourism provides an opportunity to grow local employment and generate substantial investment for infrastructure and facilities for use of residents and visitors
- Ku-ring-gai has major nature based and heritage assets that are under utilised and under capitalised, and not achieving their value to local residents and the economy.

2. RESULTS OF RESEARCH AND CONSULTATION SHOW:

- Ku-ring-gai does not currently have a recognised tourism profile in Sydney region
- Ku-ring-gai currently receives only 344,000 visitors or 1% of the Sydney visitor market (estimated at 33.8 million visitors)
- Ku-ring-gai is in a highly strategic and competitive location to major destinations and accommodation of the Sydney CBD, harbour and beaches
- Primary experiences opportunities identified are nature based and Aboriginal tourism; festivals and events
- Secondary opportunities identified are heritage and culture, recreation and leisure, and hospitality and retail.
- Opportunities to include strategies to further, harness Council's expertise in the delivery of innovative festivals and events across the LGA, and to better package and promote heritage, cultural and recreational experiences to attract visitors.

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3. RE-DEVELOP THE ST IVES PRECINCT TO ACHIEVE A 'WOW FACTOR' TO ATTRACT VISITORS, BENEFIT RESIDENTS AND HELP GROW THE LOCAL VISITOR ECONOMY.

- Position the St Ives Precinct as a new distinctive tourism and events destination in the Sydney region benefiting local residents with enhanced cultural and recreational assets and job opportunities
- Develop the St Ives Precinct as a distinctive destination in Sydney for nature based and Aboriginal cultural tourism experiences
- Establish the St Ives Precinct as a unique trekking hub and gateway for adjoining National Park trails and Hawkesbury River to Sydney Harbour linkages to achieve similar iconic status as the Three Capes Track In Tasmania
- Develop events infrastructure and supporting facilities to position the St Ives Precinct as centre for international standard performances similar to those staged at the Hope Estate in the Hunter Valley for music, cinema and performing arts
- Rebrand the St Ives Precinct to reflect its competitive advantage and world class potential (e.g. Centennial Parklands and Western Sydney Parklands)
- Commission a revised MasterPlan to balance existing recreational and community activities with a new tourism focus under a Trust governance model used elsewhere
- Achieve the Precinct's full potential as a 7 day a week/four seasons integrated mixed use destination for international and domestic visitors.

4. STRATEGIC PRIORITIES

1. Structure Tourism and Events Management resources within Council to strategically lead and implement the actions of the Ku-ring-gai DMP 2017 to 2020.
2. Continue to develop and re-position the St Ives Precinct as a contemporary and distinctive tourism destination in Sydney.
3. Establish Ku-ring-gai as a key destination for year-round festivals and events in Sydney.
4. Further develop Ku-ring-gai's architectural heritage, cultural and recreational experiences and attract quality hospitality and retail operators to the area.
5. Support the sustainable development of new accommodation infrastructure to stimulate overnight visitor stays in Ku-ring-gai.
6. Promote Ku-ring-gai and its experiences as an attractive and appealing tourism destination in Sydney.

5. NEXT STEPS

- Develop strategic alliances with key partners like Destination NSW and NPWS
- Prepare a revised Master Plan for St Ives Precinct
- Establish a case for traffic lights at Showgrounds for RMS and NSW Tourism Minister
- Reconsider proposed Council infrastructure for the St Ives Precinct in view of new directions.

1.0 Introduction

The Sydney of City Tourism Action Plan 2030¹ emphasises the importance of the tourism sector as a priority area of focus for the City of Sydney due to its important contribution to job creation and economic growth. The potential of tourism to contribute to the economic diversification of Ku-ring-gai has been considered by Ku-ring-gai Council since 2009, but to date planning for tourism has not featured in policy. Council's Delivery Program 2013 to 2017 and Operational Plan 2016 to 2017, however, determined the need for tourism business to be strengthened and expanded, to work with partners to develop a tourism and visitation strategy for Ku-ring-gai, and to develop strategies and actions that support increasing overnight stays.

This Plan has been developed to provide strategic direction for Council to plan for the sustainable management, development and marketing of tourism in Ku-ring-gai over the next four-years to 2020. In developing this Plan careful consideration has been given to ensure that the development and promotion of tourism celebrates and protects Ku-ring-gai's distinctive natural and built environments whilst providing benefits for the local community.

Importantly, the Plan identifies key catalyst opportunities that have the potential for Ku-ring-gai to gain competitive advantage in the Sydney tourism market place. This includes strategies to further develop the St Ives Precinct as a distinctive destination in Sydney for events, unique trekking, nature based and Aboriginal tourism experiences, harness Council's expertise in the delivery of innovative festivals and events across the LGA, and to better package and promote heritage, cultural and recreational experiences to attract visitors.

A key challenge for Ku-ring-gai is that it doesn't currently have a recognised tourism product in the Sydney region for domestic or international overnight and daytrip visitors. For the year ending June 2016 it was estimated that there were 344,000 visitors to the Ku-ring-gai LGA, representing only one percent of Sydney's 33.8 million visitors². Other challenges include limited visitor accommodation and a need to attract quality and contemporary tourism and hospitality operations. The Sydney tourism marketplace is also fiercely competitive. Residents and visitors to Sydney are in close proximity to other attractive and well-known attractions including Sydney Harbour, the Sydney CBD, beaches, the Blue Mountains, surrounding regions (e.g. Central Coast, South Coast) and other Sydney LGAs seeking to grow tourism.

The development of a Destination Management Plan (DMP) for Ku-ring-gai is therefore timely and well conceived to demonstrate to the NSW Government Ku-ring-gai's commitment and drive to grow its local visitor economy and to leverage public and private sector investment for key initiatives.

Aim

The aim of the Ku-ring-gai Destination Management Plan 2017 to 2020 is to strengthen the local visitor economy by increasing domestic and international overnight and daytrip visitation to Ku-ring-gai and encouraging visitor dispersal across the year and the LGA. This will be achieved by Council investing in strategic planning and development of the St Ives Precinct as an important centre for events, nature based and Aboriginal tourism in Sydney, and harnessing strategic partnerships with key public and private sector stakeholders to attract and leverage new investment for infrastructure and innovative tourism product and experience development.

2.0 Enhancing Ku-ring-gai's tourism potential

Successful tourism product and experience development requires considering a number of features often in combination including clustering, critical mass, accessibility, uniqueness and of course the WOW factor. Moreover, a destination that offers a diverse range of visitor and brand-aligned experiences is in a better competitive position than one that has a limited mix of visitor activities. Best practice destinations recognise that there is a need to provide a diversity of appropriate tourism products and activities to complement their core visitor attractions including a range of accommodation types to suit different visitor markets, vibrant events and festivals, nature based experiences, recreational and leisure activities, quality food and beverage experiences, and cultural and heritage experiences. They also support and encourage entrepreneurs to establish quality and innovative experiences³.

Ku-ring-gai has significant opportunities to capitalise on its strategic location in Sydney, and to further develop and enhance its tourism offerings related to its abundant natural environment, Aboriginal and European Heritage, expertise in delivering innovative festivals and events, and contemporary recreational facilities.

It is therefore recommended that Ku-ring-gai focuses on the development of tourism experiences and supporting infrastructure and facilities that can drive increased tourism visitation expenditure to the area and stimulate public and private sector investment to grow the local visitor economy. Ku-ring-gai's products and experiences have been categorised into primary and secondary experiences to reflect these objectives.



Primary Experiences (St Ives Precinct)

- Festivals and events
- Nature based and Aboriginal tourism

Secondary Experiences

- Architectural heritage and culture
- Recreational and leisure activities
- Hospitality and retail

These opportunities are discussed in more detail in Section 5.0.

How to achieve a WOW factor to attract visitors to Ku-ring-gai.

The main opportunities to grow Ku-ring-gai's Visitor Economy relate to potential of the St Ives Precinct as a tourism destination for events, unique trekking, nature based and Aboriginal tourism experiences. Other opportunities that could be further developed and promoted, but are not considered key drivers of visitation growth relate to Ku-ring-gai's rich architectural and cultural heritage and quality recreational facilities. It will also be important to encourage the development of quality and contemporary hospitality operations and to consider how Ku-ring-gai can increase its visitor accommodation capacity.

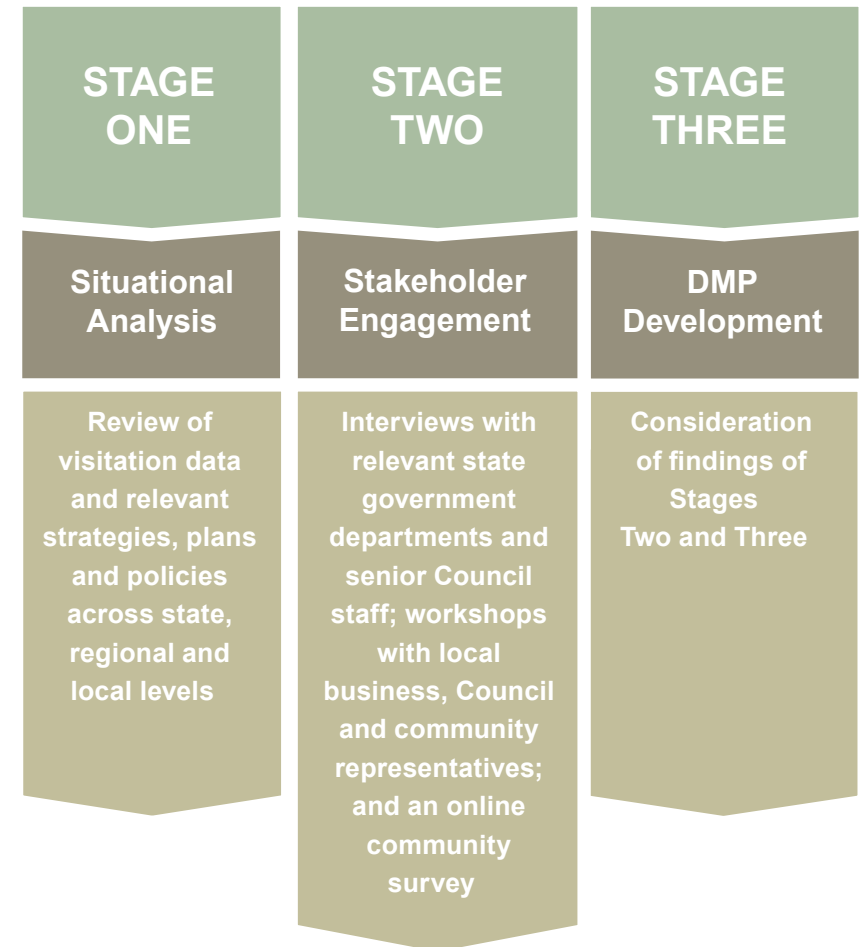
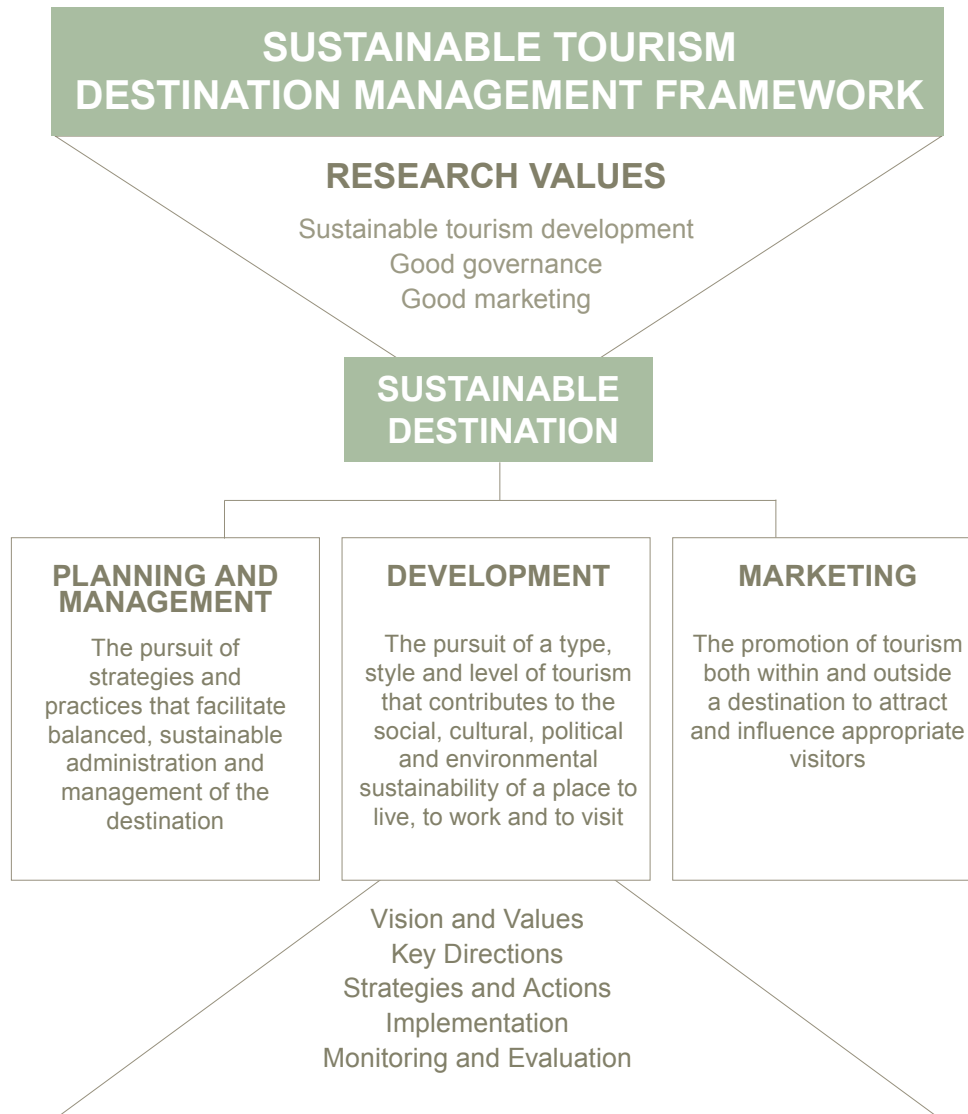
3.0 Sustainable Tourism Planning Approach

The Plan has been designed as a living strategic document that has been developed to:

- Position Ku-ring-gai as a contemporary and distinctive tourism destination in Sydney
- Respond to important issues and opportunities that were identified in the situational analysis and stakeholder engagement processes that were undertaken to inform the development of this Plan
- Recognise the role of Ku-ring-gai Council to lead and drive a sustainable approach to tourism growth and development and as custodian and manager of key supporting infrastructure and facilities
- Establish a shared vision for the future of tourism across the Ku-ring-gai LGA with government, business and community stakeholders
- Integrate recognised best practice strategies for the sustainable development, management and marketing of Ku-ring-gai as a destination
- Identify the roles and responsibilities of tourism stakeholders in the implementation of the plan to 2020
- Determine important implementation priorities over the next four years
- Integrate with the Ku-ring-gai Community 2030 strategic plans and other relevant, strategic Council documents
- Integrate with the existing St Ives Precinct Plan of Management and the Crowns Lands Act
- Encourage a productive, and integrated working relationship between industry and government stakeholders, guided by appropriate structures and governance
- Provide the tools to produce sustainable tourism that differentiates Ku-ring-gai from its competitors in the Sydney tourism marketplace that meets community and visitor expectations
- Ensure that tourism is recognised as a new source of economic development by government and the private sector
- Enhance and grow the range and quality of tourism product and experiences related to nature based and Aboriginal tourism, festivals and events, heritage and recreation
- Attract investment to support Ku-ring-gai's positioning and ensure the LGA is 'funding and shovel ready'
- Adapt to changing conditions, issues and opportunities as they arise
- Incorporate an annual monitoring and evaluation process.



The strategic approach used to develop this Plan is depicted below.



Adapted from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, SCU

4.0 Vision and Values

The Ku-ring-gai Community 2030 vision developed through consultation with local communities was used as a foundation to guide discussion with Destination Workshop participants for the development of important values to underpin a vision for tourism for Ku-ring-gai to 2020.

TOURISM VALUES

Sustainability

Ensure a sustainable approach to the development of tourism to create a viable visitor economy whilst protecting our natural and built environments and providing benefits to our local community

Experiences

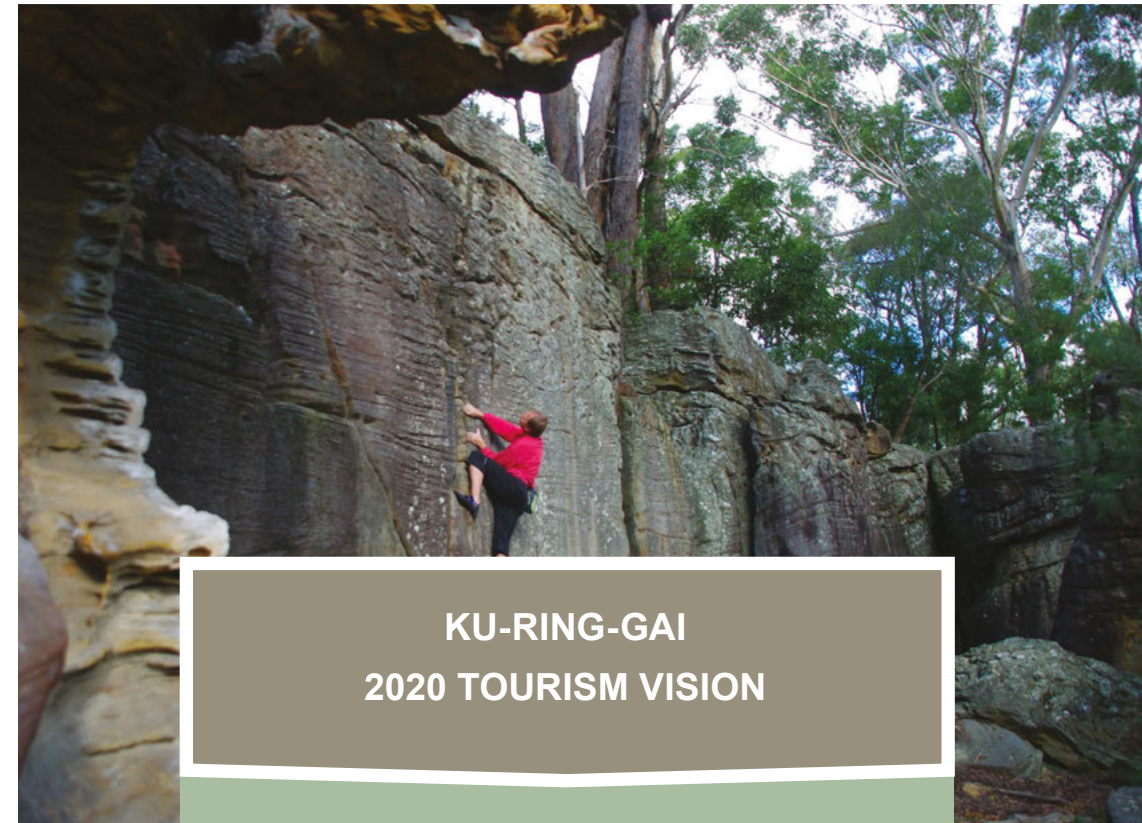
Develop and share our stories about our distinctive experiences with visitors related to our abundant natural environment, Aboriginal and European heritage, recreational facilities and expertise in events

Connectivity

Connect our local attractions and experiences to create an easily accessible, inclusive and desirable destination for visitors which is well connected to our neighbours (Greater Sydney, Northern Suburbs, North Shore)

Partnerships

Establish strategic partnerships with key public and private sector tourism stakeholders to demonstrate our commitment and professionalism in developing Ku-ring-gai as an important destination within the Sydney tourism marketplace



KU-RING-GAI 2020 TOURISM VISION

To position Ku-ring-gai as a distinctive, viable and highly accessible tourism destination through the sustainable development of innovative events and distinctive experiences related to our abundant natural environment, rich Aboriginal and European culture and heritage, and quality recreation facilities for the benefit of our residents and visitors.

5.0 Key Priorities to 2020

Priorities for the next four years focus on establishing a sound destination management framework to lead and implement the actions of this Plan as well as considerable work to develop tourism and events infrastructure and promote experiences to help grow the local visitor economy.

Priorities and associated actions in this Plan have been organised under the themes of destination, management, development and marketing and have been assigned departmental responsibility within Council and a priority time frame:

HIGH	within the first year
MEDIUM	within one to two years
LOW	within the next four years

Six strategic priorities and associated actions have been established to guide Council's role in leading and initiating growth of the local visitor economy. See diagram Strategic Priorities.

The following pages explain priorities and identify associated actions for Council to implement over the next three years to 2020 to drive and grow the Ku-ring-gai visitor economy.

Strategic Priorities

Priority One	Structure Tourism and Events Management resources within Council to strategically lead and implement the actions of the Ku-ring-gai DMP 2017 to 2020
Priority Two	Continue to develop and re-position the St Ives Precinct as a contemporary and distinctive tourism destination in Sydney
Priority Three	Establish Ku-ring-gai as a key destination for year-round festivals and events in Sydney
Priority Four	Further develop Ku-ring-gai's architectural heritage, cultural and recreational experiences and attract quality hospitality and retail operators to the area
Priority Five	Support the sustainable development of new accommodation infrastructure to stimulate overnight visitor stays in Ku-ring-gai
Priority Six	Promote Ku-ring-gai and its experiences as an attractive and appealing tourism destination in Sydney

Priority One: Structure Tourism and Events Management resources within Council to strategically lead and implement the actions of the Ku-ring-gai DMP 2017 to 2020.

Ku-ring-gai Council is well positioned to provide an important leadership role to drive and enhance the visitor economy for Ku-ring-gai. However, if tourism and events are to be pursued as economic drivers it is imperative that careful consideration is given to determine the best personnel to lead, drive, manage and implement priorities and actions of this Plan over the next four years.

Council currently has staff with skills and experience in events, visitation and business development, however Council currently doesn't have a dedicated Tourism resource to deliver this strategy. An experienced Tourism leader is essential to support current staff in delivering this strategy. A Tourism leader is needed with strategic knowledge about tourism destination management, development and marketing relevant to Ku-ring-gai, and to establish strong partnerships with key stakeholders within the broader Sydney visitor economy (DNSW, NPWS).

In addition, the current St Ives Precinct and Communications events staff provide event operational expertise. The challenge is to initiate a 'whole of destination' approach to the development, management and marketing of events to increase visitation for the St Ives precinct and Ku-ring-gai more broadly (see Priority 3).

It is also important that adequate funding is allocated to initiate the key actions of this Plan, and that the Plan is embedded in Council policy to ensure its successful implementation over the next four years. Consideration should also be given to the role and cooperation of other Council departments in the implementation of certain actions of this Plan.

Destination Management

The situational analysis and stakeholder engagement process undertaken to inform this Plan confirmed the need to:

- Increase funding for tourism in the region through the development of economically viable attractions and events
- Increase the skill mix within the Council by supporting staff to upskill and acquire specific tourism knowledge
- Establish professional and strategic relationships with key stakeholders (e.g. DNSW, NPWS)
- Network with other leading tourism destinations as a tool for learning and development
- Develop a body of stakeholders to act as a steering committee for tourism related activities in the region
- Strategically plan for natural disasters and the potential flow on effects for tourism within the region
- Educate and consult with local members of the community who may be reluctant or fearful of change to overcome potential objections to tourism planning and developments.

Priority 1

Structure Tourism and Events Management resources within Council to strategically lead and implement the actions of the Ku-ring-gai DMP 2017 to 2020.

ACTIONS		DEPARTMENT RESPONSIBILITY	PRIORITY
1.1	Integrate the KDMP 2017 to 2020 into Council Delivery Programs and annual Operational Plans.	Community	High
1.2	Review Council's budget for tourism and events to adequately resource the priorities and actions of the KDMP 2017 to 2020.	Community	High
1.3	Review budgets to seek funding for an experienced Tourism leader to support current staff in delivering this strategy and to provide strategic leadership to implement the priorities and actions of the KDMP 2017 to 2020.	Community	High
1.4	Ensure the priorities, actions and responsibilities of the KDMP 2017 to 2020 are communicated to all other Council Divisions.	Community	High
1.5	Engage with relevant state and federal politicians and Government Departments to leverage funding opportunities to implement the priorities and actions of the KDMP 2017 to 2020.	Community	High
1.6	Identify and pursue strategic & cooperative partnerships with key tourism stakeholder organisations to assist with the implementation of the KDMP 2017 to 2020 (e.g. DNSW, NPWS, AHO & neighbouring LGAs).	Community	High
1.7	Identify opportunities for on-going professional development of Council staff in tourism.	Community	Medium
1.8	Develop a Community Tourism Awareness Program to educate and inform the community about the benefits of tourism for Ku-ring-gai.	Community	Medium
1.9	Assesses and plan for potential risks related to the local visitor economy including natural disasters, threats to natural environments, currency fluctuations, and terrorist attacks and ensure visitor safety and security is assessed and integrated into current and future Council plans and policies.	Community	Medium
1.10	Educate and inform visitors about the environment, community values, appropriate visitor behaviour and safety and security.	Community	Medium

Priority Two: Continue to develop and re-position the St Ives Precinct as a contemporary and distinctive tourism destination in Sydney.

The St Ives Precinct is an asset of significant strategic potential in the Sydney region. It is a large area of land that is mostly suitably zoned and serviced, that is under Council management, with arterial road frontage that abuts a National Park stretching to the Hawkesbury River.

In 2010, Ku-ring-gai Council adopted preferred options for the site in the St Ives Showground and Precinct Options Paper, the objective of this paper being to identify opportunities to re-use existing sites and facilities within the precincts for further recreational purposes. Council and Crown Lands identified the desirability of a consolidated management approach to the site that coordinates an effective and integrated planning direction supporting management structure within a new Plan of Management. In April 2013, a Coordinator was appointed for the St Ives Precinct to manage usage of the combined sites with a focus to grow visitation which has been achieved through major events and co-ordinating current educational programs.

This study has identified the site has tremendous capacity to be positioned as important destination for events and a gateway for nature based and Aboriginal tourism to attract international and domestic overnight visitors to Sydney on a scale comparable to the various Harbour, CBD and beach attractions. The Precinct is, however, currently under utilised and under capitalised compared to its planned asset level and potential and a review needs to be undertaken of current activities and infrastructure to determine their fit within an exciting tourism future for the Precinct that is competitive in the Sydney market.

A revised Precinct Master Plan is required that shows how festivals and events, tourism product and experiences, accommodation, and infrastructure can be balanced with the existing well-utilised activities. Clear objectives need to be established for the Precinct so it can operate as an integrated destination for tourism, events and community activities. This includes articulating principles for the highest and best land use for each activity, demonstration of regular utilisation, synergy with other uses and ability to fund capital, operating and maintenance costs, and effective way finding, circulation and parking.

Destination Development

Overall, the Precinct should be planned to attract visitation over the seven-day week and the four seasons to increase visitation and achieve its full potential. To achieve a quality and distinctive tourist destination will, however require significant feasibility planning and investment. There are numerous funding and financial mechanisms available to assist Council to leverage funding from public and private sector sources to develop new infrastructure and improve existing facilities (see further explanation in Section 6.0 Scope of Master Plan page 34).

Future master planning for the site should also ensure that new tourism initiatives for the site integrate with current community and recreational/sporting activities to develop an integrated multi-purpose destination.

Figure 1 shows the potential for the Precinct as an Integrated Multi Purpose Destination indicating the common synergies across tourism, community and recreation uses.

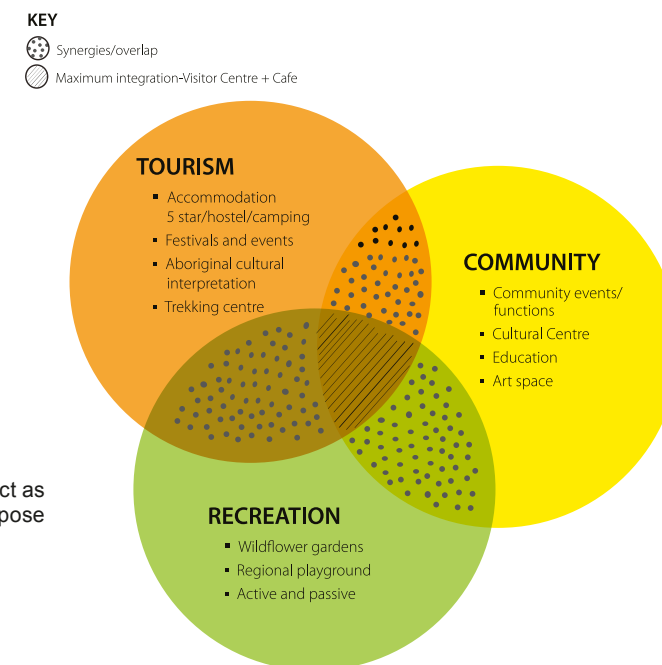


Figure 1: St Ives Precinct as an Integrated Multi-Purpose Destination

OPPORTUNITIES TO FURTHER DEVELOP THE ST IVES PRECINCT

The following outlines key opportunities to inform the development of the St Ives Precinct as a major events and tourism destination:

Re-brand the Precinct

Currently, 'St Ives' is popularly known as a suburb rather than as a tourism destination. As such, a distinctive brand and logo should be developed to better position the Precinct as a contemporary tourist destination in the Sydney region that reflects local community aspirations and its events and recreational opportunities now and into the future. The Ku-ring-gai name is well known and is unique to Council and the adjoining National Park.

Whilst the Showgrounds has an appeal as a brand most people do not understand the original agricultural function, and its use has declined. A new brand is therefore required to reflect the changes that have occurred in the district, the interests and aspirations both of local residents and the broader tourism market to Sydney. The heritage story of the Showground should be retained and shared together with its iconic buildings, structures, equipment, current activities and past agricultural uses. Sub-brands can be maintained within the overall Precinct as separate functions and areas such as The Wildflower Gardens, and its component parts, and indeed the main arena potentially as the Showground.

The common Parklands name is contemporary and used for large tracts of recreation land such as at Centennial Parklands that combines Centennial, Moore and Queens Park and the Western Sydney Parklands. These Parklands are multi purpose destinations not dissimilar to the St Ives Precinct except that they do not have such unique Hawkesbury sandstone landscapes and ecology. Significantly, they also do not have access to such massive tracts of National Park that link, through the site, to two of Sydney's premier attractions – Sydney Harbour and the Hawkesbury River.

Example names that could be considered include: Ku-ring-gai Parklands, Guringai Parklands, Northern Parklands.

Increase the Scale and Scope of Festival and Events

Ku-ring-gai Council has considerable professional events expertise provided by key staff situated at the St Ives Precinct that is being harnessed to provide memorable experiences for residents as well as attract visitors to Ku-ring-gai. The Medieval Faire and Medieval Feast, going into its fourth year, is an example of an established distinctive signature event that attracts increasing visitors from outside the LGA. There is further opportunity to increase the scope and scale of events delivered at the Precinct through the development of flexible, multi-purpose event infrastructure and the development of an Events Strategy for the St Ives Precinct, and Ku-ring-gai more broadly, to deliver an annual program of day and night events. (See more about Festivals and Events in Priority 3).

Nature based and Aboriginal Tourism Potential

Nature based tourism is recognised by Tourism Australia and Destination New South Wales as an important and growing experience sector for international, domestic and daytrip visitors. Australian and international visitors value the heritage and appreciate the opportunity to see at first hand Aboriginal heritage in Sydney from Australia and just the 'outback⁴'. NSW received nearly 25.3 million international and domestic nature based visitors that spent an estimated \$16.8 billion. Sydney receives 89% of international visitor nights and 31% of domestic visitor nights⁵.

Planning for the sustainable Aboriginal tourism product and experience development also has a role in addressing the Aboriginal Heritage Office's (AHO) key objectives to protect, manage the sites and promote greater awareness and understanding of Aboriginal culture and heritage.

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Given the Precinct sits in a highly strategic location close to the Sydney CBD, is on the catchment divide between Sydney Harbour and the Hawkesbury River, and is connected by uninterrupted National Parks, it has the potential to be a significant hub for new nature based and Aboriginal tourism experiences and interpretation including:

- Bushwalking on site
- Creating unique trekking experiences that loop through adjoining National Parks and connect to waterways in Bobbin Head and Pittwater
- Aboriginal cultural interpretation
- Wildflower education experiences.

There is also the opportunity to develop unique accommodation experiences that complement these experiences (e.g. a five-star eco-tourism lodge sited near the boundary of the National Parks escarpment, hostel accommodation for education and recreation groups, and flash-camping). This will involve working at a strategic level with agencies such as the NPWS, DNSW and AHO to identify and plan game changing and catalyst tourism experience and infrastructure development projects and clearly determining key domestic and international visitor markets it seeks to attract. It is important to also recognise that within the Sydney and surrounds region Ku-ring-gai is competing with other well-established nature based attractions and experiences.

Ku-ring-gai has, however, a major competitive advantage over destinations such as the Blue Mountains due its proximity to the Sydney CBD and the exceptional qualities of its bushland and waterway assets.

It should be recognised that the recommended strategy, focused on nature based and Aboriginal cultural tourism, has environmental protection and enhancement at its core. There are numerous examples around the world of sensitively designed accommodation and infrastructure within and adjacent to National Parks and areas of high ecological value. It is proposed that all new development in the St Ives Precinct will be sensitively designed, constructed and operated in accordance

with best practice including protection of Duffy's Forest and other endangered ecological communities and there should be a net improvement to environmental performance on site such as increased biodiversity, improved drainage runoff, Aboriginal cultural interpretation and signage. It should also be appreciated that many parts of the St Ives Precinct are in a degraded environmental condition, as are trails in the adjoining National Park, such as the Warrimoo track to Bobbin Head which is also unsafe and hazardous.

Best Practice Example

The Southern Island Lodge offers a unique, luxury and exclusive travel experience on Kangaroo Island in South Australia. Floating atop a secluded cliff on a rugged stretch of coast, the lodge commands peerless views of the wild Southern Ocean and pristine Kangaroo Island wilderness. Sensitive, intimate and sophisticated, Southern Ocean Lodge is a sanctuary of refined comfort and luxe, Kangaroo Island style.



Source: www.luxurylodgesofaustralia.com.au

The situational analysis and stakeholder engagement process undertaken to inform this Plan confirmed opportunities to:

- Better connect the Precinct to the Great North Walk
- Develop self-guided walks through attractions such as the KWG Phantom Falls
- Enhance current walking trails to make them circular
- Position the site as a hub for Aboriginal and cultural tourism
- Develop a suitable museum/education space for the Aboriginal Heritage Office
- Establish regular bush walking with members of the Indigenous community
- Offer 2 day/1 night tours that connect with Sydney
- Create eco-tourism product where people can spend \$100 to \$200 per visit
- Restore the Showground precinct as the focal point of many events throughout the calendar year
- Develop an outdoor cinema and operate a monthly market at the showground venue
- Increase accommodation options exploring the idea of developing 'glamping', camping, hostel and/or an Eco-Lodge at the site
- Develop dormitory accommodation for school groups
- Promote film tourism opportunities at the site
- Promote equestrian facilities and events and other community and family friendly outdoor activities at the site including: the proposed regional playground and Ecoline attraction, remote control planes and cars, dog walking and training, athletics, soccer and other sporting activities in line with community needs
- Establish and promote short horse trekking experiences through Ku-ring-gai and the northern beaches.

Challenges identified include the need to:

- Increase funding to upgrade infrastructure and facilities at the site including toilet facilities, power and access
- Consider how to overcome the lack of traffic lights at Precinct and improve traffic management at the site
- Improve signage at the Precinct
- Determine the maximum visitor capacity of the site
- Carefully consider development constraints due to bushfire controls and potential ecological impacts at the site.



National Parks Interface

NPWS tourism and planning personnel consulted at the Bobbin Head Regional Operations office appreciated the strategic position and value of the St Ives Precinct for nature based tourism both from the existing activities and assets at the Wildflower Gardens and in the future as a world-class trekking hub with accommodation and tourist services. The personnel were very supportive of Council initiative in promoting tourism and recognised the potential for linking with NPWS infrastructure, trails and in building new connecting trails where necessary. It was appreciated that a new iconic walking track tourist product could be developed that connected by walking trails the St Ives Precinct with Brooklyn, Bobbin Head and West Head which already have brand awareness, infrastructure and high quality scenic values. The conceptual nature of these connections would be as follows:

- Bobbin Head via Warrimoo Track and return or by existing ferry service from Bobbin Head to Palm Beach/the Basin then back to the St Ives Precinct
- Brooklyn, via existing Warrimoo, Berowra, and Great North Walk tracks with rail access at Berowra, Cowan and Brooklyn stations and ferry services at Brooklyn and Bobbin Head
- West Head, via the Basin camping area that also has ferry services to Palm Beach and a combination of existing and new trails
- Both the Brooklyn and West Head walks would be day walks from St Ives Precinct although there are options to do sections. From St Ives Precinct West Head would be the order of 18km and Brooklyn 22km although this distance could be reduced to approximately 17km with the construction of a 4 km section across the park that removes the need to join the Great North Walk down to Berowra Waters.

The Park also has extensive Aboriginal cultural artefacts and dramatic Hawkesbury sandstone ecology and scenery of significant tourist potential. Currently an Aboriginal tourist operator conducts tours of special Aboriginal engravings with cultural interpretation at West Head. NPWS consider the tourist market for natural experiences is very large and growing with the demands from Chinese visitors.

The NPWS is short of funds for trail and infrastructure development so they would welcome some sort of public private partnership. Track upgrading and construction can be managed through Plan of Management amendments and require workshops as part of the planning process. The NPWS is happy to participate in this investigation process.

Any private sector investment in accommodation and other commercial facilities at the St Ives Precinct should also contribute funds for new and upgraded trails and associated infrastructure.

It is recommended that strategic discussions should be held with the Minister for NPWS and senior NPWS executives about the potential and development of iconic new world class tracks in the adjoining National Parks, connecting trails in the LGA and the development of a trekking and Aboriginal cultural interpretation program centre at the Precinct. These discussions should involve joint ticketing, management and revenue sharing. Strategic discussions should also be undertaken with Aboriginal heritage and tourism stakeholders to identify opportunities to best incorporate Aboriginal heritage and cultural education and experiences.

Appendix 2 shows maps of concept ideas to inform the development of a Master Plan for the site.

NPWS Master Plan Opportunities

The NSW Government's Office of Environment and Heritage is currently completing a Master Plan for the State that is due to be released in early 2017. It is understood that the Master Plan will provide clear focus and new strategic directions related to way NPWS partners with commercial and industry nature based tourism stakeholders, including cooperative marketing and capacity building initiatives such as skills training, awards, and certification. In addition, consideration is being given to addressing visitors' wants as part (e.g. pathways, cycle ways, walk, café's). It is also proposed that the NPWS Eco Pass licensing system for tour operators will be reviewed to ensure it is user-friendly and provides improved access to Parks for tour operators.

Priority 2

Continue to develop and re-position the St Ives Precinct as a contemporary and distinctive tourism destination in Sydney

ACTIONS		DEPARTMENT RESPONSIBILITY	PRIORITY
2.1.	Establish a Steering Committee comprised of experts with knowledge of tourism and urban planning opportunities for Ku-ring-gai to oversee the immediate planning and development of the Precinct.	Community/Strategy & Environment	High
2.2	Commission a revised Master Plan for the St Ives Precinct that determines the highest and best uses for the site for tourism, events, recreation and community activities.	Community/Strategy & Environment	High
2.3	Rebrand the St Ives Precinct to position it as an important destination in Sydney.	Community/Strategy & Environment	High
2.4	Engage at a strategic level with NPWS, DNSW, Aboriginal tourism and heritage organisations and education providers (e.g. AHO, TAFE Northern Sydney Gamarada Aboriginal Education & Training Unit and Gawara Aboriginal Learning Centre – Northern Beaches) to identify industry and commercial partnership opportunities for nature based and Aboriginal tourism product and experience development and cultural interpretation at the Precinct.	Community/Strategy & Environment	High
2.5	Prepare a business case proposal after the Master Plan is finalised that articulates and promotes tourism infrastructure and investment opportunities associated with the St Ives Precinct to potential private sector tourism and hospitality investors and entrepreneurs.	Community/Strategy & Environment	Medium
2.6	Work with relevant local groups to further develop wildflower tourism and educational experiences.	Community/Strategy & Environment	Medium
2.7	Subject to anticipated determinations by Crown Lands Department, consider the establishment of a separate entity to manage the Precinct, or parts thereof, on Councils behalf (e.g. the Trust model is one that has been used by governments at all levels to encourage a specific purpose professional approach to land and asset management).	Community/Strategy & Environment	Medium

Best Practice Example

An interesting model for the Precinct's interface with the National Parks is the recently developed Three Capes Track in Tasmania. The \$25 million project was jointly funded by the Tasmanian and Australian Governments and was designed to change visitor perceptions that the Tasman Peninsula is only a day-trip destination. The track and associated accommodation infrastructure contains 46km of track and comprises a 4 days/3 night experience. Walkers pay around \$500 with accommodation provided in deluxe huts dotted along the route. Bookings are essential and it is promoted as 'a walking experience at the world's edge'. On opening, Lonely Planet called it one of the world's hottest new travel experiences. Port Arthur provides existing transport, car parking, retail and management infrastructure and a brand for the successful leveraging of the track.

It was anticipated that when fully operational, 10 000 people will walk the Three Capes Track per year (up to 60 departures a day) with at least 90 per cent of the walkers from interstate or overseas. Research indicates that the average length of stay in Tasmania will be at least twice the time spent on the walk, leading to flow-on benefits for local operators and the community. The walk has, however, proved to be enormously successful since opening with bookings exceeding expectations achieving gross revenue of \$3.3 million from the Three Capes Track Experiences in its first 10 months of operation.

Priority Three: Establish Ku-ring-gai as a key destination for year-round festivals and events in Sydney.

The strategic development of festivals and events presents a real and exciting opportunity to grow visitation and expenditure to Ku-ring-gai. As recommended in Priority One, an Events Management team should be established that integrates events staff at the St Ives Precinct and Communications Events Department to provide strategic leadership and operational experience and initiate a whole of destination approach to the development, management and marketing of events across Ku-ring-gai. Consideration of Council resourcing (financial and human) will be important to ensure adequate managerial and operational staffing to manage and deliver an annual event program. The development of flexible and multi-purpose events infrastructure and facilities as part of a new Master Plan for the St Ives Precinct will also be critical in positioning Ku-ring-gai as an important events destination in Sydney.

The development of an Events Strategy is recommended as a priority action to identify and coordinate an annual program of viable festival and events to be hosted by Council, to be procured and delivered by commercial event organisers and community based events for the St Ives Precinct and Ku-ring-gai more broadly.

The aim should be to establish a program of year-round leisure and entertainment festival and events that align with the vision to attract new and repeat visitors from outside Ku-ring-gai whilst providing unique entertainment and recreational experiences for visitors and the community including:

- Review of current festival and event offerings delivered by Council to determine those which should be supported to drive and increase visitation
- Identification of signature events that will generate awareness for Ku-ring-gai's tourism strengths and opportunities
- Determining strategies to grow and promote the Guringgai Festival

Destination Development

- Working cooperatively with Sydney Living Museums and other local heritage stakeholders to plan for regular heritage related events
- Working cooperatively with private sector event organisers to create new innovative events
- Establishing marketing strategies to promote festivals and events to visitors and residents
- Promoting accommodation facilities (including the sharing economy) to attract overnight visitors attending festivals and events
- On-going research to evaluate the economic and socio-cultural benefits of events to use as evidence to leverage event funding and support.

Best Practice Example

The Hope Estate in the Hunter Valley is home to a 20,000 amphitheatre that regularly hosts world-class events including The Rolling Stones, Bruce Springsteen and the E Street Band, Eagles, Sting and Paul Simon, Rod Stewart and Elton John. Event experiences are complemented by quality food and wine.



The situational analysis and stakeholder engagement process undertaken to inform this Plan identified opportunities to:

- Develop multi-purpose events infrastructure at the St Ives Precinct to host events of national significance (e.g. Hope Estate Concert Stage, Hunter Valley)
- Increase the calendar of events to appeal to outside visitors
- Host annual events that represent the area's brand and image
- Attract larger scale events to the region to increase exposure of the destination
- Spread Guringai Festival activities across Ku-ring-gai and improve Indigenous participation.

Challenges identified included the need to:

- Raise funding for new events and associated infrastructure
- Ensure events are economically viable to the region and Council
- Better publicise event listings and increase media attention at events.



Ku-ring-gai's Key Events

The Medieval Faire and Medieval Feast, now in its fourth year, is an established distinctive signature event that is attracting increasing visitors from outside the LGA. It is estimated that 40% of the 15,000 attendees for the 2016 event were from outside Ku-ring-gai. The Wildflower Art and Garden Festival is also another event that has the potential to attract an increasing amount of external visitors.

The Guringai Festival is an annual celebration of Indigenous culture and heritage, starting in May with National Sorry Day and running until the end of NAIDOC Week in July (26 May to 10 July). The festival raises awareness of Aboriginal and Torres Strait Islander people living in this region of northern Sydney, once inhabited by the Guringai tribe, and the need to close the gap in health and wellbeing between Indigenous and non-Indigenous Australians. Events include workshops, art exhibitions and children's performances, with a focus on reconciliation as well as walks (e.g. Aboriginal Heritage Walk, Saltwater Coastal Walk, Ku-ring-gai Chase Indigenous Walk).



Priority 3

Establish Ku-ring-gai as a key destination for year-round festivals and events in Sydney

ACTIONS

		DEPARTMENT RESPONSIBILITY	PRIORITY
3.1	Prepare an Events Strategy 2017 to 2020 that identifies events and strategies to deliver an annual program of festivals and events to increase visitation to Ku-ring-gai throughout the year.	Community	High
3.2	Develop and promote a comprehensive annual events and festivals calendar that promotes key festivals and events to attract new and repeat visitors to Ku-ring-gai.	Community	High
3.3	Develop an annual Festival and Events Marketing Plan that identifies strategies to promote events and festivals across the LGA.	Community	High
3.4	Liaise with other Council divisions to ensure maintenance of infrastructure and operational support is in place for the tourism events calendar.	Operations	High
3.5	Introduce a 'one stop events shop' to assist event organisers with regulatory requirements for events and festivals within the LGA.	Community	Medium
3.6	Encourage 'whole of destination' support for events and festivals through visitor friendly Initiatives (e.g. appropriate opening hours and availability of amenities and services).	Community	Medium
3.7	Develop and train a pool of event volunteers to support event organisers.	Community	Medium
3.8	Engage an event evaluation consultant to regularly report and consistently evaluate visitation, visitor satisfaction and the economic impact of key tourism festivals and events.	Community	Medium

Priority Four: Further develop Ku-ring-gai's architectural heritage, cultural and recreational experiences and attract quality hospitality and retail operators to the area.

As identified earlier in this Plan, in addition to developing the St Ives Precinct, other tourism experience opportunities that could be further developed to contribute to the growth of the local visitor economy include the further development of Ku-ring-gai's rich architectural and cultural heritage as a niche tourism experience and the promotion of recreational facilities to visiting sporting and recreational groups. It will also be important to encourage the development of quality and contemporary hospitality and retail operations to provide a total destination experience for visitors.

Architectural Heritage Experience Development

Ku-ring-gai boasts some of the most significant architectural heritage in Sydney. Rose Seidler House, one of twelve houses of the Sydney Living Museum collection, is regarded as one of the finest examples of mid 20th-century modern domestic architecture in Australia. In addition, Eryldene Historic House and Gardens and Tulkynian House² in Gordon provide important heritage experiences for visitors. Suburbs such as Killara also provide many examples of Federation and Californian Bungalow style houses and Lindfield is well known for its leafy outlook and architecture, from Federation-style houses to examples of Tudor Revival and Art Deco on the Pacific Highway. Currently, however, visitation to heritage properties is quite restricted and there is no coordinated or 'whole of destination' approach to delivering interesting heritage experiences for visitors. Heritage Houses are also mainly staffed by volunteers. As such, there is a need for a more coordinated approach to better support local stakeholders to package and promote Ku-ring-gai's heritage experiences.

² It is understood the property is in need of maintenance works before it can be opened to visitors.

Destination Development

Recreational Opportunities

Ku-ring-gai Council has been undertaking considerable infrastructure improvements to recreational facilities across the LGA to provide quality experiences for residents that may also be attractive to visiting sporting and education groups. Facilities include Ku-ring-gai Fitness & Aquatic Centre, North Turramurra Golf Course, Jubes Mountain Bike Park, St Ives Village Green, St Ives Skate Park, Bicentennial Park and Gordon Golf Course. These facilities are mainly used for residents, so there are opportunities to promote to other Sydney residents. A constraint to attracting visiting sporting groups from outside of Sydney, is however a lack of accommodation.



Attract New Hospitality and Retail Operations

It is critically important that if Ku-ring-gai wants to attract visitors, it needs to encourage and support the development of contemporary hospitality and retail operations to provide quality and diverse hospitality experiences for visitors. Tourism related services (accommodation and food services) currently accounts for only 4% of employment within the Ku-ring-gai LGA.

The Wahroonga retail area provides a growing range of complementary hospitality and lifestyle shopping experiences for visitors to the area that has a growing reputation amongst Sydney residents. Revitalisation of Ku-ring-gai's local centres including Gordon, Turramurra, St Ives, Pymble, Lindfield and Roseville has been identified as a long-term goal in the Council's Community Strategic Plan that may stimulate investment into retail and hospitality operations. Planning for the delivery of the first of these projects, The Lindfield Community Hub, is currently underway as a Public Private Partnership (PPP) to ensure that a high quality project is delivered and meets the expectations of residents. Located on the western side of the Lindfield Town Centre, it has an estimated construction cost of over \$150 million and it is proposed the 1.3 hectare site will be a new mixed use precinct with community buildings, boutique shops, cafes, restaurants, apartments and a below-ground supermarket. Planning has also progressed for the Gordon Hub Project.



Image courtesy of Annette Coates

The situational analysis and stakeholder engagement process undertaken to inform this Plan identified opportunities to:

- Encourage collaboration between operators to better package heritage products and experiences for visitors
- Work cooperatively with Sydney Living Museums to develop heritage tourism experiences and events
- Package and promote unique niche heritage experiences and stories for visitors related to Ku-ring-gai's strong colonial heritage
- Develop self-guided and guided tour options
- Have regular open houses/gardens that also connect to cultural tourism experiences
- Employ local members of the community as tour guides to create unique experiences for visitors through their passion for the local area
- Open a 'regional' gallery for the region that facilitates a strong exhibition program that engages and promotes local artists
- Upgrade and further develop parks in the destination – e.g. family friendly facilities
- Develop sporting events that will attract participants from outer regions
- Promote sports tourism – e.g. Golf
- Promote recreational facilities to visiting sporting groups
- Increase food and beverage options around key attractions
- Attract quality hospitality and retail operators
- Work collaboratively with heritage and environmental groups to promote, restore and celebrate Ku-ring-gai heritage values.

Priority 4

Further develop Ku-ring-gai's architectural heritage, cultural and recreational experiences and attract quality hospitality and retail operators to the area

ACTIONS		DEPARTMENT RESPONSIBILITY	PRIORITY
4.1	Work cooperatively with Sydney Living Museums, local heritage stakeholder groups and operators to establish a strategic and coordinated approach to development of year-round heritage and cultural experiences including Heritage Walks in Ku-ring-gai.	Community	Medium
4.2	Package and promote recreational experiences and sports and recreational opportunities to sporting and education groups in Sydney.	Community	Medium
4.3	Ensure opportunities for the establishment quality hospitality and retail operations that are attractive to visitors are well-considered as part of strategic planning for the Lindfield, Gordon and Turramurra Hub projects.	Community, Strategy & Environment	High
4.4	Create a 'Tourism and Hospitality Investment and Business Opportunities' website that is independent of Council's website but linked to the 'Doing Business in Ku-ring-gai' website section.	Community	High

Priority Five: Support the sustainable development of new accommodation infrastructure to stimulate overnight visitor stays in Ku-ring-gai.

The availability of quality, value-for-money accommodation is a key component in a visitor's destination choice and a top three consideration in short-break travel. Ongoing investment is, however, required to develop new accommodation and refurbish existing facilities to meet changing visitor expectations and to ensure visitor satisfaction. Accommodation development should also fit with the overall brand and image of a destination to ensure that it reflects both consumer and host community values.

Ku-ring-gai's available accommodation is currently limited to some Bed and Breakfast establishments, pub accommodation and AirBnB properties. Although Ku-ring-gai has a shortage of visitor accommodation capacity it is, however, in relatively close proximity to other areas with established accommodation options including Sydney CBD, North Sydney, Chatswood, Hornsby and the Northern Beaches.

It is therefore recommended that in addition to investigating accommodation development opportunities for the St Ives Precinct (see Priority 2), development of Bed and Breakfasts establishments would help to increase visitor accommodation capacity that align with Ku-ring-gai's heritage image. This will require reviewing Development Control Plans to identify suitable locations for Bed and Breakfast accommodation and to determine ways to support and encourage owners to establish these facilities. In addition, the availability of private homes for visitor accommodation that are promoted by the sharing economy (e.g. AirBnB, Stayz) should be encouraged, but supported by responsible holiday-letting practices to minimise potential visitor impacts.

Opportunities for tourism development identified in the City of Sydney Tourism Action Plan 2030 pertinent to Ku-ring-gai include the need to grow demand for 'green tourism' and eco-tourism and meet demand for greener accommodation and high quality facilities and infrastructure.

Destination Development

The situational analysis and stakeholder engagement process undertaken to inform this Plan identified opportunities to:

- Investigate the potential of various accommodation types at the St Ives Precinct as a base for events patrons and nature based visitors— e.g. glamping, hostel accommodation for education and recreation groups, a distinctive 5 star ecotourism lodge (See Priority 2)
- Develop more Bed and Breakfast properties linked to heritage
- Review council regulations to encourage accommodation development
- Develop viable camping infrastructure that does not impact on locals - noise and traffic congestions
- Promote AirBnB properties to potential visitors.

Challenges identified included the need:

- For a sustainable approach to accommodation development that protects natural and built environments and residential amenity
- Recognise that a lack of accommodation options restricts the destination to day trip visitors
- Consider the type of accommodation to be developed – e.g. budget accommodation will attract low-yield visitors.

Priority 5

Support the development of new accommodation infrastructure to stimulate overnight visitor stays in Ku-ring-gai

ACTIONS		DEPARTMENT RESPONSIBILITY	PRIORITY
5.1	Undertake an audit of available visitor accommodation in Ku-ring-gai and neighbouring LGAs to determine the scale and characteristics of current offerings (including sharing economy listings).	Community	High
5.2	Review Council development control and land use policies to identify suitable locations for Bed and Breakfast accommodation and determine ways to support and encourage owners to establish these facilities.	Strategy & Environment	High
5.3	Provide information on Council's Development and Planning website section that clearly articulate Council guidelines to provide potential developers and property owners with information to encourage quality and sustainable accommodation development that complies with Council and environmental policies and information about planning processes, development controls, local economic and community profiles and links to relevant Council information.	Development & Regulation	High
5.4	Develop Best Practice Holiday Letting Guidelines for property owners of sharing economy properties (e.g. AirBnB, Stayz) to encourage responsible holiday-letting practices to minimise potential visitor impacts.	Community	Medium
5.5	Promote visitor accommodation opportunities through Council and commercial visitor information services (see Priority 7).	Community	Medium

Priority Six: Promote Ku-ring-gai and its experiences as an attractive and appealing tourism destination in Sydney.

Ku-ring-gai does not currently have a profile as a tourism destination in Sydney. As such, there is a need to consider how to best position Ku-ring-gai as an attractive and appealing tourism destination to Sydney residents and visitors in a very competitive marketplace. As explained earlier in this Plan, Ku-ring-gai's key competitive strengths are its location that is close to the Sydney CBD and its abundant natural environment that provides opportunities for international and domestic overnight visitors to participate in nature based and Aboriginal tourism experiences without having to leave Sydney.

Destination marketing initiatives for Ku-ring-gai should promote these advantages, as well as better package and promote other experience opportunities to attract Sydney residents including:

- Development of experiences at the St Ives Precinct
- Key festivals and events
- Architectural Heritage as a niche tourism experience
- Recreational facilities to attract sporting and educational groups
- Retail shopping opportunities.

Visitor Information Services

There is currently no strategic, coordinated or creative approach to the promotion, or provision of enticing visitor information, of Ku-ring-gai's tourism attractions and experiences to potential visitors. Visitor information is fragmented and limited to Council's website that provides some information about things to do in the area, but is not 'visitor focused'. The Hornsby Ku-ring-gai Visitor Guide, published by a commercial operator, provides the only material promoting tourism and hospitality products and experiences across Hornsby Shire and the Ku-ring-gai LGA. Visitor information about nature based and Aboriginal tourism is provided digitally and through NPWS visitor information centres (Bobbin Head Information Centre and Kalkari Discovery Centre) and nature based tour operators promote their services on-line.

Destination Marketing

There is therefore an immediate need to enhance the delivery of contemporary and appealing visitor information and imagery that is focused on Ku-ring-gai's current key visitor experience sectors through the creation of a new stand-alone and enticing tourism-focused visitor information website. In addition, opportunities to work cooperatively with publishers of the Hornsby Ku-ring-gai Visitor Guide, NPWS and Visit NSW should be explored to ensure a consistent approach to the presentation of visitor information about Ku-ring-gai's key experience sectors³.

Ku-ring-gai's key experiences can also be promoted to local residents that may be hosts to Visiting Friends and Relatives. Recent research undertaken by DNSW shows that the Visiting Friends and Relatives (VFR) market is of considerable importance to NSW. A DNSW report found hosts are well placed to be ambassadors for driving tourism in NSW and are receptive to encouraging visitation from family and friends, and their willingness to spend to provide their visitors a memorable experience⁴. Hosts, however, need further inspiration and incentivisation to maximise their ambassador status and drive greater value from the VFR segment.

³Note, the development of a visitor information 'App' is not recommended as recent research shows the uptake of such applications is limited.

Key Visitor Markets

Analysis of visitation research confirms that the focus for marketing Ku-ring-gai's tourism products and experiences should be concentrated on the following key visitor markets:

International and Domestic Visitors – seeking easily accessible located nature based and Aboriginal tourism and niche heritage experiences

Sydney residents – from other Sydney LGAs interested in innovative events, quality nature based and Aboriginal tourism experiences, heritage, recreation and retail shopping experiences

Visiting Friends and Relatives – seeking tourism experiences whilst staying in the Ku-ring-gai/North Shore region.

See Appendix 3 for an overview of key visitation research findings.



The situational analysis and stakeholder engagement process undertaken to inform this Plan identified opportunities to:

- Link the regions 'brand' around 3 common themes; the natural environment, the coastline and Indigenous history
- Better coordinate promotional activities so that Ku-ring-gai has a presence in current tourism publications
- Increase international visitation – i.e. Ku-ring-gai can offer a different experience from the norm
- Promote Ku-ring-gai a significant green space close to Sydney
- Build on the 'Leafy North Shore Image' through environmental credentialing and Indigenous tourism
- Promote key attractions, cultural precincts, nature walks and heritage trails
- Develop visitor maps to show connectivity of attractions and experiences
- Increase visibility through improved signage that provide visitors with clear directions.

Challenges identified included the need to:

- Understand who is the target market for Ku-ring-gai
- Identify what is Ku-ring-gai's competitive edge as a destination to brand the region and develop a point of difference from competing regions with large marketing budgets
- Increase marketing activities to highlight attractions within the region
- Improve resources to promote tourism in the Ku-ring-gai region

It is recommended that a staged approach to destination marketing be applied to better promote current visitor experiences, then as new tourism infrastructure and products and experiences are developed further marketing initiatives can be established.

Priority 6

Promote Ku-ring-gai and its experiences as an attractive and appealing tourism destination in Sydney

ACTIONS		DEPARTMENT RESPONSIBILITY	PRIORITY
6.1	Create a new stand-alone and enticing visitor information website 'Visit Ku-ring-gai' to package and promote key experience sectors including: nature based tourism, Aboriginal tourism, architectural heritage, recreational opportunities, retail shopping to attract visitors to the area that also links to relevant stakeholder visitor information(e.g. NPWS, VisitNSW)	Community	High
6.2	Work cooperatively with the publishers of the Hornsby Ku-ring-gai Visitor Guide to provide enticing editorial and advertising related to Ku-ring-gai's key visitor experiences	Community	High
6.3	Work cooperatively with NPWS to improve visitor information about nature based and Aboriginal experiences in Ku-ring-gai	Community	High
6.4	Review editorial on the Visit NSW website to ensure that the information is enticing and clearly explains Ku-ring-gai's key experience sectors (see Priority 6.1)	Community	High
6.5	Create a quality tourism image and video library of key visitor experiences and events to be used for visitor information and promotional initiatives	Community	High
6.6	Develop a Public Relations and social media plan that consistently promotes Ku-ring-gai's experiences in an enticing way	Community	Medium
6.7	Encourage all tourism and hospitality operators to list their products and regularly update their listing with the Australian Tourism Data Warehouse (ATDW) to ensure that they are represented on visitnsw.com.au	Community	High
6.8	Develop tactical marketing campaigns to promote new experiences as they are launched at the St Ives Precinct (e.g. Ecoline, markets, regional playground)	Community	High
6.9	Develop strategic relationships with key tourism stakeholder organisations to improve awareness of Ku-ring-gai's tourism potential and leverage collaborative promotional opportunities (e.g. DNSW, NPWS, neighbouring LGAs)	Community	Medium
6.10	Develop a VFR campaign that promotes Ku-ring-gai's experiences to residents for their visiting friends and relatives	Community	Medium
6.11	Audit visitor information signage throughout the LGA to ensure all key attractions are clearly signed	Community	Medium
6.12	Develop a Tourism Marketing Plan (2018 to 2020) that identifies strategies to position and promote Ku-ring-gai as an appealing and attractive visitor destination by promoting its key experiences related to nature based and Aboriginal tourism, festivals and events, heritage and recreational experiences including digital and social media strategies	Community	Medium
6.13	Develop a Marketing Plan to launch and promote the re-development of the re-named St Ives Precinct	Community	Low

6.0 St Ives Precinct Master Plan Scope and Planning Considerations

1. Scope

A revised Master Planning process to guide the integration of tourism and events with the current recreation and community functions should have the following main scoping elements:

- Recognition of the boundaries of the St Ives Precinct which are consistent with Councils adopted Plan of Management for the St Ives Precinct 2015 (see Appendix 4)
- Consider the potential for greater synergy of both sites on opposite sides of Mona Vale Road once a signalised intersection and pedestrian crossings are introduced
- Definition of the key objectives of the Plan to determine priorities
- Consultation with current and future user groups using 'charette style' workshops with key stakeholders
- An opportunities and constraints analysis to identify highest and best land uses
- Identification of key tourism product and experiences that provide distinctive visitor experiences
- An audit that reviews the scale and characteristics of available and planned visitor accommodation within Ku-ring-gai and surrounding LGAs to identify including viable accommodation options for the site
- Identification of suitable and flexible event spaces, infrastructure and supporting facilities
- A movement system analysis around the Precinct- car, coach, pedestrian, trails, freight and emergencies
- Estimates of future peak time and annual visitation compared to current to justify land use allocation, traffic lights and associated investments
- Review of infrastructure services requirements
- Cost estimates
- Staging options for the development of the site
- Identification of marketing themes and performance outcomes
- Risk identification and management
- Consideration of developmental constraints e.g. bushfire and environmental impacts.

Best Practice Example

Moonlight Cinema,
Centennial Parklands, Sydney



2. Current Capital Works

Immediate consideration is needed of current and proposed capital works for the Precinct to determine how they can best fit into a tourism vision and function for the site. These include consideration of:

- The location of the Cultural Centre that could be combined with a new Visitor centre/café in the main Showgrounds area
- The development of the new Regional Playground and Ecoline attraction
- Planned car park upgrades
- Sports fields developments
- Potential activities for the commercial site on Mona Vale Rd with its high traffic exposure that will complement the vision for the Precinct and help increase visitation, revenues, and potential shared services (e.g. relocate the Native Nursery to this site so that it is more accessible to passing traffic
- Current and potential event programming.

3. Transport Access

Efficient transport access to the Precinct is essential for successful tourism operations. Depending on time of day the Precinct can be only 30-40 minutes from the Sydney Harbour and CBD attractions and accommodation.

Mona Vale Rd provides significant exposure and access to the Precinct. However, the current three entry points being to the Wildflower Gardens, the Showgrounds and HART/Green waste site are dangerous particularly when needing to cross traffic flows and lanes as there are no signalised intersections. Additionally it is particularly hazardous for pedestrians and cyclists crossing the road and few would currently do it.

The site would benefit from a combined and signalised access point leading to a central visitor services and cafe to guide visitors around the site and to provide a management and promotion point. It would also benefit from active planning and

integration with the HART car circuit and green waste tip site across Mona Vale road such as with overflow parking, as occurs now, and in cross promotion such as for activities, events and functions.

The current Mona Vale Road site vehicle entry points and no provision for pedestrians and cyclists crossing represents a major risk factor to both the Council, as Site manager, and the RMS. The road also is a major source of noise to activities requiring peace such as the Caley Pavilion function centre, the senses walk and other activities in the Wildflower Gardens.

Discussions should be held with RMS about creating a signalised intersection for entry to the Showgrounds and opposite the HARTS site, and for this to be designed for pedestrians to safely cross and linked to the trail system.

Consideration should also be given to the closure of the Wildflower Gardens entry, and possibly its joint access road could be closed or converted to one way to remove dangerous Mona Vale Road crossings. This may be of benefit to RMS and vehicular movements on this busy arterial. This Wildflower Gardens access road entry could be maintained for emergency services use. Also these discussions with RMS should include feasibility of noise wall construction along the Wildflower Gardens boundary up to and including the Showgrounds site as the road traffic noise affects the quality of the visitor experience and should be treated as an externality cost to be borne by the road authorities.

The Master Plan needs to address the alignment and design of the internal access road needed to link The Showgrounds and the Wildflower Gardens. It should review all movement systems including pedestrian, road, trail, car and coach parking, freight deliveries and emergency services to ensure an effective wayfinding for all users.

4. Infrastructure and Facilities Development

Consideration of the location and usage of the following infrastructure and facilities:

- Flexible events infrastructure and spaces to support an annual program of festivals and events
- Visitor Information and Interpretation Centre for nature based experiences and Aboriginal cultural interpretation, native flora and fauna education
- The Wildflower Garden
- Wildflower Native Plant Nursery
- Bushwalking tracks on site and as a base for trekking in adjoining National Parks
- A range of accommodation types designed to reflect the location from camping and hostel types to five star eco-tourism
- Quality and contemporary hospitality operations

5. Governance Arrangements

To develop the St Ives Precinct as a distinctive tourism destination will require a unique skill set and flexibility in management and operations as substantial investment will be required from the private sector, Council, NSW and potentially the Commonwealth Government given the strategic value of the site. Crown land can remain the landowner and existing arrangements with Council as land manager can remain in place.

Consideration should also be given to the establishment of a separate entity to plan and manage the Precinct, or parts thereof, on Councils behalf. The Trust model is one that has been used by governments at all levels to encourage a specific purpose professional approach to land and asset management. The Trust model is a method of revitalising the St Ives Precinct by introducing specific performance objectives, professional and business skills and a variety of investment mechanisms. Basically the Trust model is not-for-profit and allows an asset to remain in public ownership whilst using flexible and market responsive planning and development techniques. Public assets and facilities are maintained and in many instances improved. The Trust has Council and community representation on its Board and can report annually to Council against specific targets and budgets. There are numerous examples of Trusts and other not for profit specific performance vehicles across local government (Lake Macquarie Economic Development Unit) NSW government (Centennial and Moore Park Trusts) and Commonwealth (Sydney Harbour Federation Trust).

The Trust would have on its board Council community representatives as well as skills from legal, marketing, financial and business in the tourism and recreation sectors. The Trust would operate to an agreed vision and objectives. It would have planning and operational flexibility to lease land and enter into agreements based on the objectives and the Master Plan, which would be reviewed at least annually.

6. Costs, Revenue and Funding Sources

Costs

The Precinct requires significant upgrade to perform its existing functions and to diversify to be positioned as a credible tourism offering. Council is currently preparing to spend significant funds on car parking upgrades, a new cultural centre (that could also provide visitor services and a café), and potentially new sporting fields. For the expanded tourism functions to be achieved the following types of capital expenditure will be required:

- A new signalised intersection, to be whole or part funded by RMS (an estimate of \$800,000 has been given) and noise walls
- A new Master Plan for the Precinct that should also determine complete capital cost scenarios (estimated cost around \$100,000)
- An internal access road for the Wildflower Gardens
- Accommodation and native Wildflower nursery construction that could be funded by the private sector under leasehold tenure
- Road Sewer and drainage works at Showground.

Operating costs will involve maintenance, management, promotions, and services.

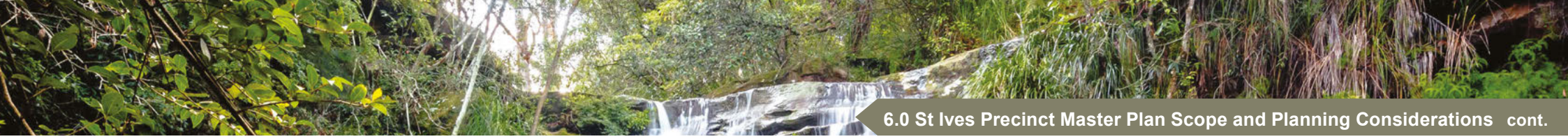
It is assumed that existing Council rate payers would continue to use the facilities at no cost on low impact activities such as dog-walking, equestrian activities, localised bushwalking and environmental education for visiting school groups.

Revenues

Agreements with Crown Lands should also be reviewed to determine commercial and planning implications for tourism development, and how any surplus funds from commercial businesses in the Precinct can be re-invested into the Precinct.

There are a number of other sources of revenue that successful tourism businesses can contribute to the Precinct. These include:

- Souvenirs
- Event ticketing and lease arrangements
- Walking track ticketing
- Commercial leases e.g. for café/hospitality operations, accommodation, nursery
- Film and TV shoots
- Sponsorship and advertising.



Funding Sources

The Precinct and its new tourism functions can have wide appeal for government, NGO and private sector funding due to its highly strategic location and valuable natural attributes. In addition to Councils substantial existing and future investments in the Precinct funding sources may include:

- NSW and Commonwealth government tourism and environmental grant and funding programs
- Private sector accommodation and hospitality investors.

Grant funds at both Commonwealth and State levels can be made available for projects that meet specific program guidelines. Recent examples include tourism infrastructure, regional development, cultural and sporting facilities. Grant programs and priorities change regularly so they need to be tracked and applications tailored accordingly. Councils can attract funding by having a well documented case, be able to make a cash and/or in kind contribution and have projects shovel ready.

There are numerous examples of comparable projects that have received government funding. Projects that have national and international appeal have a very good base for attracting funding. The upgrade of the iconic Mount Panorama racing circuit at Bathurst involved equal contributions from Commonwealth and State Governments of \$10m each.

It is considered that the St Ives Precinct, if properly presented with a revised Master Plan could have significant funding appeal.

Another simple way of raising funds for essential infrastructure improvements that are Council responsibility, and meet tourism objectives and provide recreational facilities for residents, is to lease land, for example at St Ives for accommodation (e.g Eco lodges, glamping and hostel) and a commercial nursery.

Council can receive infrastructure upgrading funds through standard S.94 contributions and from Voluntary Planning Agreements (VPA). The latter could be applied to essential track upgrades in adjoining National Parks (that doesn't have the funds) for specific educational, cultural and visitor facilities. The VPA funds could also be used to attract government grants as demonstration of intent and as a matching contribution.

7. Business Case Development

A business case should be prepared after the Master Plan is finalised to identify and support the funding options. This business case would identify future visitation projections and the associated revenue and costs.



7.0 Implementation and Evaluation

To ensure the effective implementation of this Plan, it is important that the Community Department takes the main role in leading the implementation the priorities and actions of this Plan. Support and collaboration from other Council Departments is also critical to its success.

Monitoring of the implementation of the Plan's action is also important to ensure the aim and vision is achieved and to provide information that can be used to inform decision-making over the next four years.

It is recommended that the Community Department monitors the implementation of the DMP on an annual basis and prepares an annual report, in cooperation with other Council departments, to evaluate the progress undertaken in achieving priorities and actions contained in this plan. Key outcomes achieved can be communicated to Council, industry and community stakeholders (see more below).

Is it also recommended that the consultants are engaged to review the Evaluation Report findings and makes recommendations for any adjustments to the Plan as appropriate.

An annual review process should evaluate:

- Policy – has Council adopted the Plan? Are there new Council policies that need to be considered as part of the Plan?
- Governance – are the tourism and event governance arrangements still appropriate? Have there been any changes in the Council organisational structure that may impact the implementation of the Plan?
- Stakeholder Engagement – are government, industry and community stakeholders supportive of the Plan? Are they engaged in its implementation? Have key priorities been communicated?
- Issues and Opportunities – have new issues or opportunities emerged that need to be considered and addressed in the Plan?

- Implementation – have strategic priorities and actions been implemented effectively? Are there any issues or concerns with the implementation process and its timing? How can they be overcome? Are resources adequate to ensure the on-going implementation of the Plan?
- Monitoring – a table summarising the annual progress in achieving priorities and actions contained in this plan should be included in the annual report and those actions to be undertaken in the next 12-month period.

The following areas should also be evaluated specifically using quantitative and qualitative methods as part of the annual reporting process:

- Key visitor markets – findings of a comprehensive review of annual TRA visitation data to evaluate domestic, daytrip and international visitations including: overall visitor numbers, key visitor markets, number of overnight stays, length of stays, expenditure, visitor demographic profiles, purpose of trip, and visitor activities (remember the aim is to increase visitor expenditure)
- St Ives Precinct – review of planning and development initiatives for the site
- Events and festivals – review of any new events and festivals; new event infrastructure; findings of research undertaken at events and festivals to evaluate visitation, satisfaction, and economic, social and environmental impacts; event volunteer programs
- Tourism product and experience development – review of new or enhanced tourism and product experience development
- Infrastructure and facilities development – review of new and proposed infrastructure and facilities development including transport
- Accommodation development – review of any new or proposed development including the sharing economy
- Strategic partnerships – review of partnerships/relationships developed with key stakeholder organisations and outcomes achieved

continued next page

- Consumer research – findings of any research that evaluates visitor expectations and satisfaction of Ku-ring-gai as a tourism destination
- Strategic and tactical marketing – review of effectiveness of tourism and event marketing campaigns
- Visitor signage – review of new visitor signage development
- Visitor information services – review of new visitor information services that have been developed, the number of operators participating in visitor information services
- Visitor economy risks – review of any new issues related to risk management for tourism
- Grant funding – identification of successful grant applications for tourism development
- Awards and Achievements – review of any awards or achievements of the local tourism industry and Council initiatives for tourism and events that help to position Ku-ring-gai as a distinctive tourism destination and demonstrate best practice.





8.0 References

1. City of Sydney Tourism Action Plan 2030 , December 2013
2. Tourism Research Australia, YE June 2016, STA2 areas: Wahroonga/Warawee, Turramurra, St Ives, Pymble, Lindfield/Roseville, Gordon/Killara
3. Wray, M., Dredge, D., Cox, C., Buultjens, J., Hollick, M., Lee, D., Pearlman, M., & Lacroix, C. (2010) Sustainable regional tourism destinations: Best practice for management, development and marketing, Sustainable Tourism Cooperative Research Centre, Gold Coast
4. Destination New South Wales, NSW VFR Host Research, YE March 2016
5. Destination New South Wales, Nature Based Tourism to NSW, Year ended December 2015.

9.0 Appendices

Appendix 1: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED IN THE STAKEHOLDER ENGAGEMENT PROCESS

Stakeholder Organisations represented at Destination Workshops

Ability Links NSW
Aboriginal Heritage Office
Australian Plants Society (North Shore Group)
Eco-line Pty Ltd
Grace Cossington Smith Gallery
Friends From Afar
Hornsby and Ku-ring-gai Visitor Guide/Bush Telegraph
Ku-ring-gai Orchid Society
National Parks and Wildlife Service
Northern Suburbs Agricultural @ Horticultural Society Inc.
Oxfam
St Ives Orchid Fair
Sydney Outback Tours
That Great Market (Lindfield)

Ku-ring-gai Council and staff represented at Destination Workshops

William Adames	Community and Business Coordinator
Michelle Aldhamland	Events Coordinator
Jennifer Anderson	Mayor
Christiane Berlioz	Councillor
Janice Bevan	Director, Community
Penny Colyer	Team Leader Natural Areas, Strategy and Environment
Patrick Corrigan	St Ives Precinct, Coordinator
Les Currie	St Ives Precinct, Team Leader Tourism and Visitation
Matthew Drago	Manager Open Space Operations
Jenny Edyejones	St Ives Precinct, Wildflower Garden Visitor Services Officer
Matthew Joyce	St Ives Precinct, Bookings Officer
Marnie Kikken	Manager, Environment and Sustainability
Virginia Leafe	Manager, Corporate Communications
Cheryl Szatow	Councillor
Mark Taylor	Manager, Community and Recreation Services
Rachel Thomson	Events Coordinator
Alison Walker	Principal Landscape Architect

Appendix 1: LIST OF STAKEHOLDER ORGANISATIONS REPRESENTED IN THE STAKEHOLDER ENGAGEMENT PROCESS cont.

Stakeholder interviews conducted to inform the development of the Ku-ring-gai Tourism Strategy

Destination New South Wales

Julie Bishop	Group Director, Destination Development
Carlina Ericson	Zone Manager
Shane Dredge	Tourism Development Officer, Aboriginal Tourism
Jenny Mitchell	Industry Development, Senior Coordinator

Ku-ring-gai Council

Bill Royal	Team Leader, Urban Design
Louise Drum	Senior Urban Designer

National Parks & Wildlife Service

Patricia Wilkinson	Tourism Strategy Senior Project Officer - Tourism and Partnerships Unit
Jenny-Lee Scharnbrook	Zone Team Leader, Sydney and Central Coast
Jo Jewitt	Visitor and Tourism Services Manager
Carol Betts & Tim Porter	Discovery Program Coordinators
Robin Aitken	Area Manager, Ku-ring-gai Chase Area

Sydney Living Museums

Karen Rivera	Head, Marketing & Audience Insight
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Appendix 2: CONCEPT MAPS FOR THE ST IVES PRECINCT

Figure 1: Tourism Concepts St Ives Precinct

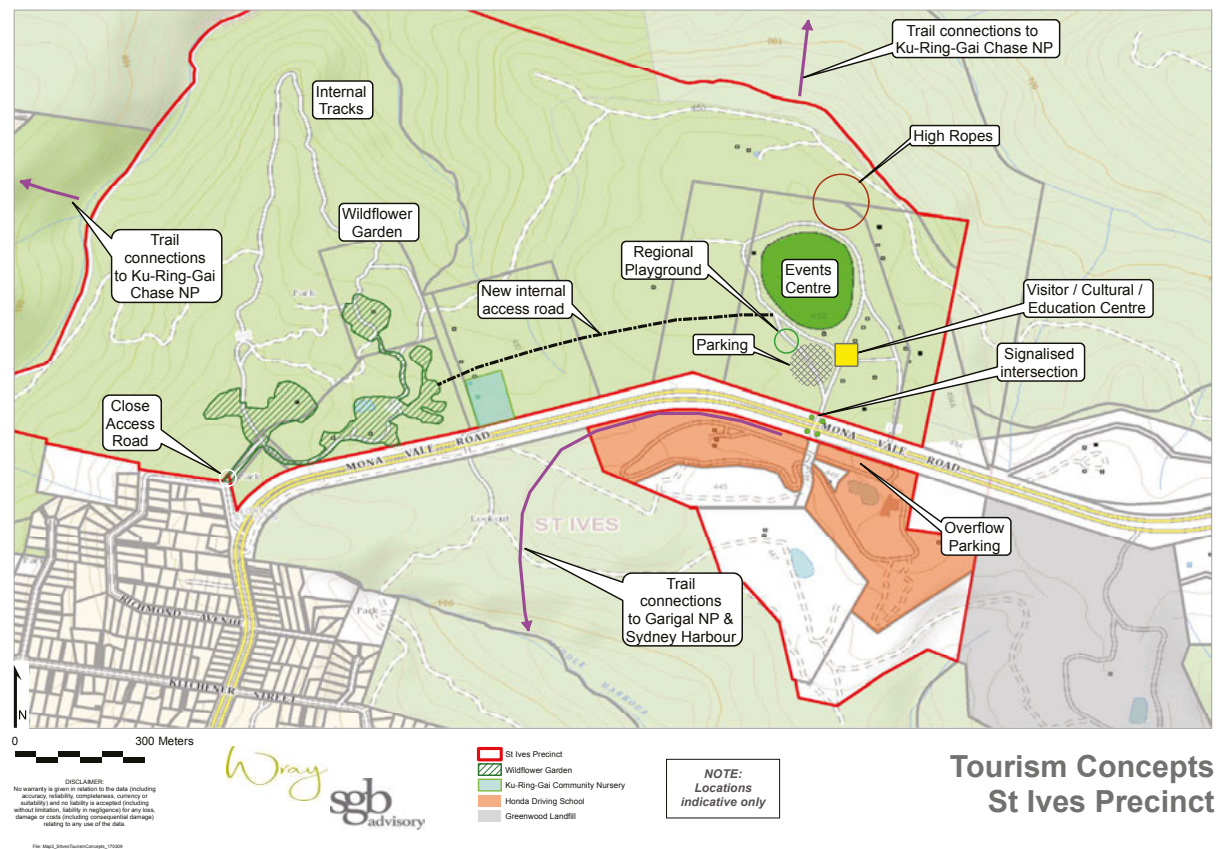
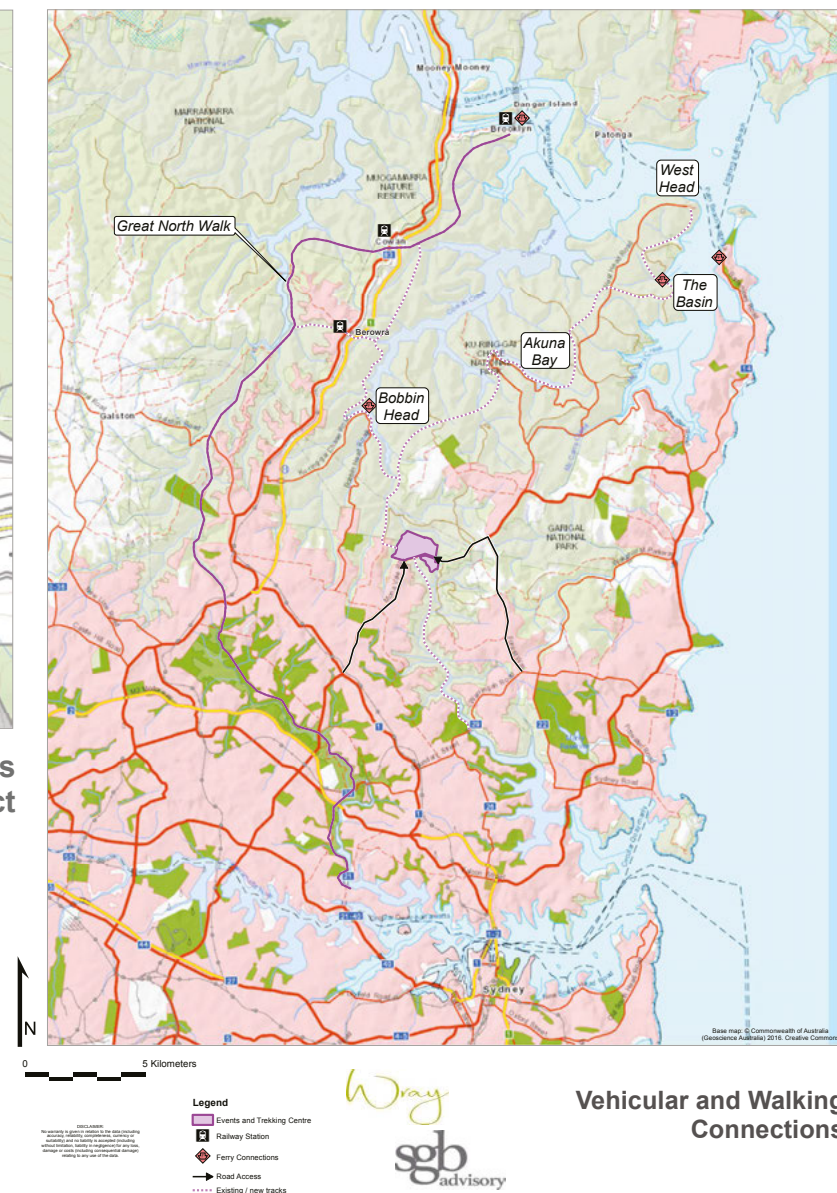


Figure 2: Vehicular and Walking Connections



Appendix 3: OVERVIEW OF KEY VISITATION RESEARCH FINDINGS

Ku-ring-gai is not particularly active in the Sydney tourism marketplace. Tourism Research Australia (TRA) visitation statistics for the year ending June 2016 show increasing visitation of domestic overnight and daytrip visitors, and international visitors to Sydney. For the year ending June 2016 Sydney received 33.8million visitors of which 27% were domestic overnight visitors, 10% were international visitors and 63% were daytrip visitors.

Ku-ring-gai received 1% of these visitors – 337,400 visitors of which 35% were domestic overnight visitors, 9% were international visitors and 56% were domestic daytrip visitors. The following table shows visitation to Ku-ring-gai as compared to Greater Sydney (Table 3). The challenge for Ku-ring-gai is consider how to effectively tap into domestic and international overnight visitation to Sydney, and encourage Sydney residents to come to Ku-ring-gai to experience its attractions.

Table 1: Visitation to Ku-ring-gai & Sydney, YE June 2016

Visitor Type	Ku-ring-gai* '000	Sydney	% Sydney
Domestic Overnight Visitors	119.1	9.2m	1.3
Domestic Overnight Visitor Nights	338.9	23.8m	
Domestic Average Stay	2.8	2.6	
Domestic Daytrip Visitors	187.6	21.2m	0.9
International Visitors	30.7	3.4m	0.9
International Visitor Nights	857.8	73.1m	
International Average Stay	27.9	21.5	
Total Visitors	337.4	33.8m	1.0
Total Visitor Nights	1196.7	96.9m	
Total Expenditure	\$211m	\$17.1b	1.2

*Includes STA2 areas – Wahroonga/Warawee, Turrumurra, St Ives, Pymble, Lindfield/Roseville, Gordon/Killara

Source: Tourism Research Australia, YE June 2016

Analysis of visitation to Ku-ring-gai for financial years 2011/2012 to 2015/2016 shows a decline in visitation to the LGA for the three years from 2011/2012 and improvement in 2015/2016 (Table 4). These results are generally consistent with visitation to other destinations during this time that reflect broader economic conditions from 2012 to 2014 including a high exchange rate, subdued economic conditions in key export markets, a slower pace of growth in spending by domestic households and a downturn in business travel following the peak in resources investment boom in 2012¹.

Table 2: Time Series Analysis Financial Year 2011/2012 to 2015/2016

	2011/12 '000	2012/13 '000	2013/14 '000	2014/15 '000	2015/16 '000
Domestic Overnight Visitors	122.81	80.85	148.45	87.44	119.09
Domestic Visitor Nights	492.72	297.9	460.28	198.77	338.95
International Visitors	29.24	18.51	23.00	23.11	30.73
International Visitor Nights	883.24	738.46	594.22	562.09	857.79
Daytrip Visitors	182.6	381.1	271.6	173.5	187.6

Source: Tourism Research Australia, YE June 2016

¹Dobson, C. & Hooper, K. (2015). Reserve Bank Bulletin: Insights from the Australian Tourism Industry, March Quarter 2015

Appendix 4: ST IVES PRECINCT BOUNDARIES

