



BLUE MOUNTAINS DESTINATION MANAGEMENT PLAN



PREPARED FOR BLUE MOUNTAINS CITY COUNCIL NOVEMBER, 2016





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"The DMP recognises, acknowledges and respects the deep and unbroken connection of the Darug and Gundungurra people to their Country, as the Traditional Owners of the Blue Mountains, and strives to ensure that appropriate cultural and economic benefits are realised for these communities, through the development of tourism in the Blue Mountains."

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ABBREVIATIONS

ALOS	Average Length of Stay
B&Bs	Bed and Breakfast Style Accommodation Providers
BMATA	Blue Mountains Accommodation and Tourism Association
BMHC	Blue Mountains Heritage Centre
BMNP	Blue Mountains National Park
CAPEX	Capital Expenditure
CBD	Central Business District
DA	Development Application
DCP	Development Control Plan
DMP	Destination Management Plan
GBMA	Greater Blue Mountains Area
GBMT	Greater Blue Mountains Trail
GCTW	Grand Clifftop Walk
GWH	Great Western Highway
GWoA	Great Walks of Australia
LEP	Local Environmental Plan
LGA	Local Government Area
LTO	Local Tourism Organisation
NPWS	National Parks and Wildlife Service
NSRF	National Stronger Regions Fund
NZ	New Zealand
PPP	Public-Private Partnership
RMS	Roads and Maritime Services
RSA	Regional Strategic Alliance
RTO	Regional Tourism Organisation
The Group	The Stafford Group
UNESCO	United Nations Educational, Scientific and Cultural Organization
VIC	Visitor Information Centre
WHS	World Heritage Site



RASPBERRY + WHITE CHOC
MUFFINS \$6 / CROISSANTS \$3.50
SPR + PISTACHIO STRUDEL \$6.50
PESTO MEGADON, GOAT'S CHEESE
+ ROAST PUMPKIN THATS \$6.50

GLUTEN FREE
Chocolate Chip Cookie

1. EXECUTIVE SUMMARY

The Stafford Group (The Group) was commissioned by Blue Mountains City Council (Council) to complete a Destination Management Plan (DMP) for the Blue Mountains Local Government Area (LGA)¹. The purpose of the DMP is to:

- help grow the visitor economy on a sustainable basis;
- provide solutions to challenges facing the LGA to support sustainable visitor growth;
- identify new development and related solutions to attract investment and grow economic benefits, such as employment;
- support future funding bids for specific projects, including NSW State Government funding opportunities;
- provide direction on key marketing activities to support increased visitor demand for the LGA; and
- help build stronger local community awareness of the importance and value of the visitor economy.

1.1. Key Findings

The following reflects the key findings which link challenges and opportunities.

- While the Blue Mountains is one of the major visitor destinations in NSW and a UNESCO World Heritage Site (WHS), it fails, surprisingly, to rank as highly as other Australian iconic destinations (such as Uluru and the Great Barrier Reef) on global websites as a “must see” destination or significant site in Australia.
- The fact that the Blue Mountains is so easily accessed from the Sydney CBD² is both an opportunity and a challenge in trying to shift it from a day visitor destination to an overnight destination. Refocusing on encouraging an overnight visitor market is a key outcome given the far stronger economic and employment benefits able to be generated.
- The importance of the visitor economy is not always well understood. The development and growth of the visitor economy can support ancillary sectors such as education, retail, health etc. but the value of this is still to be fully recognised. With an ageing population, the importance of tourism as an economic driver should not be underestimated.
- Potential exists to develop and strengthen niche areas of tourism including the education sector, focused on international hospitality, creative, language and environmental related programs³. The sector offers a valuable market for expanding the visitor economy and generating local employment.
- Potential also exists to develop and strengthen other market segments which offer diversity and reduce the reliance on nature-based tourism, including heritage and cultural product, food tourism (including cooking schools and events) and formal garden experiences.
- Visitors are often not able to differentiate between Council owned and managed infrastructure and National Park and Wildlife Service (NPWS) owned and managed areas. An example of this is the viewing area and associated infrastructure created by Council at Echo Point. The bar set by Council is high. Other product is sometimes not of the same standard. Council is incorrectly criticised, at times, for areas, and their look and feel, which are outside of its control and ownership.
- Half and one-day walks such as the Three Sisters, Reids Plateau/Furber Steps (Katoomba Falls) and Grand Canyon walks are well supported. The “Great Walk” (overnight, in-park, guided walking experiences) market exhibits strong growth from

¹ Throughout this DMP, when the term “the Blue Mountains” has been used, this refers to the Blue Mountains LGA, rather than the old RTO region which included the LGAs of Lithgow and Oberon.

² The major international gateway into Australia

³ We note the recent DA for an educational establishment for short term Chinese cultural study students, offering 60 overnight and 200 day student positions. The school will cater for student groups ranging from primary school to university.

domestic and international markets. The Blue Mountains (and NSW) is not recognised, however, as having a Great Walk. There is a need to develop and market a Great Walk for the Blue Mountains.

- The Grand Clifftop Walk (GCTW) consists of half and one-day walks which allows for overnight stays in various villages. This component of the visitor experience is important and should be more strongly marketed. This product, however, is distinctly different from a possible overnight in-park Great Walk, similar to what is offered in other WHSs in other states and internationally.
- Most tourism-related infrastructure is concentrated in villages in the upper mountains (from Wentworth Falls to Blackheath). The lack of supporting infrastructure (car parking etc.) in other locations and a stronger residential focus makes it difficult to introduce sustainable tourism and related activity. In time, and subject to the introduction of quality supporting infrastructure (car parking, quality trails, signage, viewing platforms, rest areas, pop-up information booths and seasonal cafés etc.), there could be additional tourism opportunities in the lower mountains (such as in the Scenic Eastern Escarpment at Glenbrook).
- The urban footprint which hugs the central ridgeline through the LGA creates a challenging environment for competing land uses – residential, tourism and other uses.
- Public transport services to the LGA are constrained on weekends and public holidays. There is a need for more eight carriage trains with luggage and bike storage.
- The tourism industry is characterised by a high percentage of small operators which are often undercapitalised and constrained in their ability to expand. Helping to nurture and grow these businesses through industry training and upskilling will be important.
- The destination brand focus is centred on the Blue Mountains' natural environment, including the Blue Mountains National Park (BMNP) and the World Heritage designated Greater Blue Mountains Area (GBMA). This fails, however, to promote other experiences (commercial and community focused) which are important value-adds and motivators for people to visit, such as: culture, heritage, events, food experiences, gardens and seasonal landscape changes etc.
- The LGA would benefit from "game changing" initiatives to address current infrastructure constraints and to help future-proof the LGA to benefit the local community and the tourism sector. Small-scale initiatives are likely to have limited impact.
- The LGA needs tourism to be a bigger contributor to the local economy and a driver of local employment. New, appropriate development is needed, particularly to fill the under-representation of 18 - 30-year-olds residing or working in the LGA.
- The Great Western Highway and other main roads have had major upgrades and offer quality driving experiences and faster times to reach locations. Opportunities now exist to create additional regional drive circuits building on the Greater Blue Mountains Drive and Discovery Trails.
- Through the Regional Strategic Alliance (RSA) between Blue Mountains, Penrith and Hawkesbury City Councils, the opportunity exists to create regional marketing initiatives to drive higher yielding visitor markets and expand the product base.
- Potential exists to grow niche sectors such as agri-tourism, heritage and cultural tourism and special interest events.
- The LGA requires enhancements to its product range, investment into new and existing facilities and investment into supporting infrastructure. This will require a commitment from the public (at a local, state and federal level) and private sectors.

1.2. DMP Vision for the Blue Mountains

A vision for tourism for the Blue Mountains is required. The vision should be as follows.

To position the Blue Mountains as a strong and vibrant destination building on:

- *its world heritage designation;*
- *the deep and unbroken connection of the Darug and Gundungurra people to their Country, as the Traditional Owners of the Blue Mountains;*
- *growing the overnight and associated higher spending visitor markets;*
- *offering a consistent level of quality in all areas of the visitor economy; and*
- *being a brand leader in the Regional Strategic Alliance and state-level Sydney Surrounds North Destination Network.*

1.3. The Challenges Identified

There is a need to address and resolve various broad-ranging issues (Figure 1). A partnership approach is required by Council, state and federal government agencies, the tourism industry and community to find workable solutions.

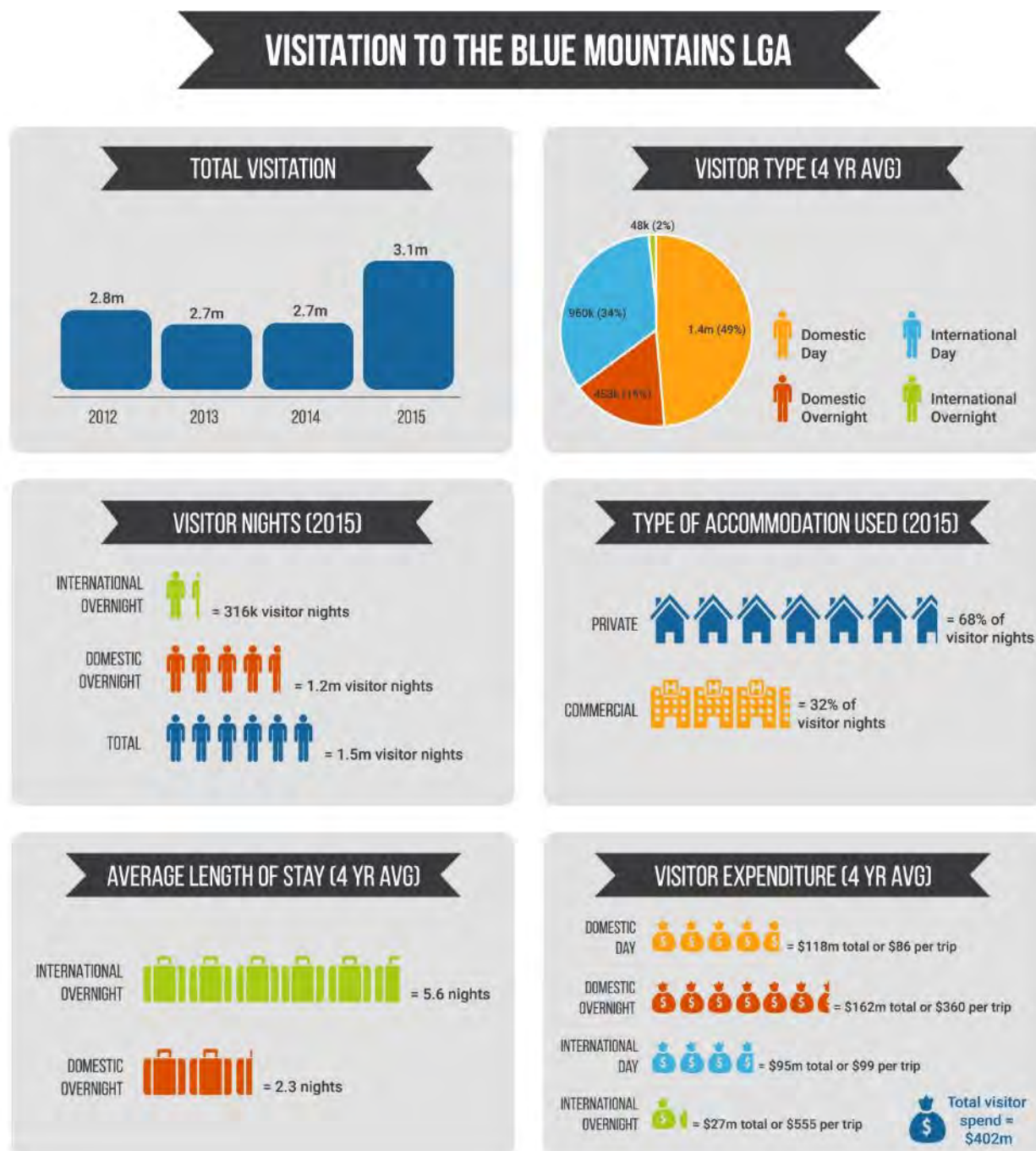
Figure 1: The Challenges Identified

Product & Infrastructure Challenges	Marketing Challenges	Planning & Land Use Challenges
<ul style="list-style-type: none"> ▪ Cost of trail maintenance ▪ Freedom and illegal camping ▪ Lack of evening activities ▪ Lack of experiences for under 10s market ▪ Lack of room capacity ▪ Lack of tour coach drop off area at Leura ▪ Large event calendar ▪ Large number of small operators ▪ Limited pay-for experiences ▪ Limited new investment ▪ No overnight in-park trekking ▪ Parking (coach and car) ▪ Unlicensed tour operators 	<ul style="list-style-type: none"> ▪ Branding and cross tenure management ▪ Lack of product packaging ▪ Lack of unity behind a destination brand ▪ Lack of diverse brand attributes ▪ Limited/fragmented digital presence 	<ul style="list-style-type: none"> ▪ Ageing population ▪ Bushfire regulations and restrictions ▪ Geographic layout ▪ Heritage development constraints ▪ No in-park accommodation ▪ Precursors to attracting investment ▪ State government planning standard instruments

1.4. Visitation to the Blue Mountains

Figure 2 provides a summary of visitation to the LGA. It highlights the significant day tripper market (domestic and international) and the need to identify strategies to convert a proportion of day trippers into overnight visitors to grow yield and reduce pressure on facilities.

Figure 2: Summary of Visitation⁴

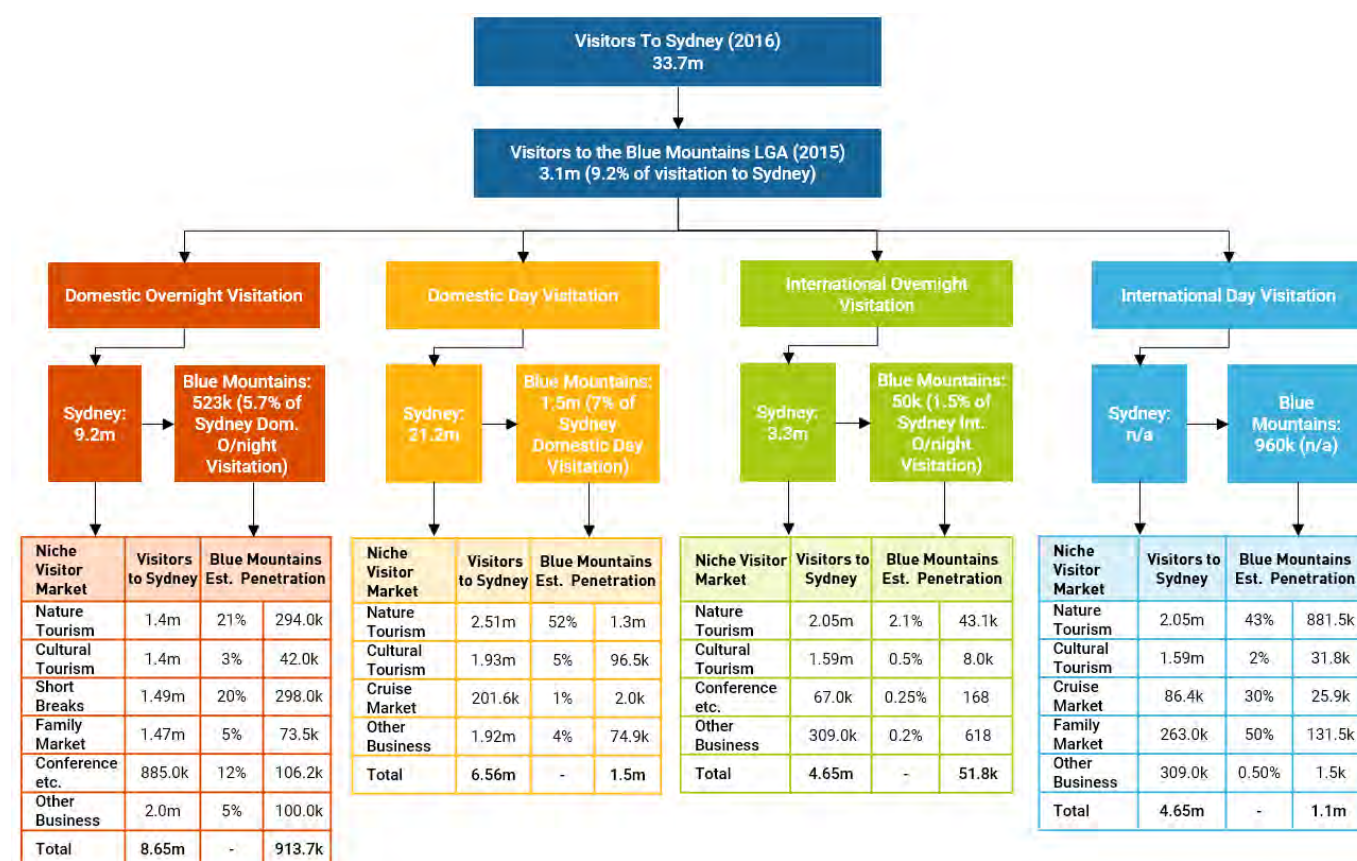


⁴ Data in the infographic is based on a Special Data Request to Destination NSW as well as the LGA Profile – Blue Mountains (4-year annual average to September 2014), <http://www.destinationnsw.com.au/wp-content/uploads/2015/06/Blue-Mountains-LGA-profile-1.pdf>. That the average length of stay (ALOS) and spend for international visitors is skewed by international students and workers who stay in the region for longer periods of time. The ALOS for a “true” international visitor to the Blue Mountains (that is, those who are travelling for leisure etc.) is estimated to be similar to the domestic overnight visitor ALOS at 2.3 nights.

1.5. Market Share

Figure 3 illustrates the Blue Mountains' estimated share of the domestic and international visitor markets to greater Sydney⁵. While the Blue Mountains is not technically part of greater Sydney, a disproportionately high percentage of the domestic and international markets is generated there. The figure offers insight into segments where the Blue Mountains is seen to have a stronger market share and, conversely, niche markets where it appears to have a smaller share and where opportunities for new product development and marketing/promotional programs should be considered.

Figure 3: Visitor Markets to the Blue Mountains⁶



⁵ Based on the DNSW defined "Sydney and Surrounds" region.

⁶ Note: Niche markets do not add up to total market size (i.e. all niche domestic overnight visitor markets do not add up to total Blue Mountains domestic overnight visitation of 523k) because categories are not mutually exclusive – some visitors may fit into multiple categories (e.g. a visitor counted as a nature visitor may also be counted as a cultural visitor).

1.6. Opportunities for the Blue Mountains

As part of this DMP, 39 opportunities have been identified to offer solutions to many of the challenges which the LGA is currently facing. Additionally, they provide the potential to grow the visitor economy in a sustainable manner, focusing on growing visitor yield rather than visitor numbers. Figure 4 provides a summary of these.

Figure 4: Opportunities Mapped

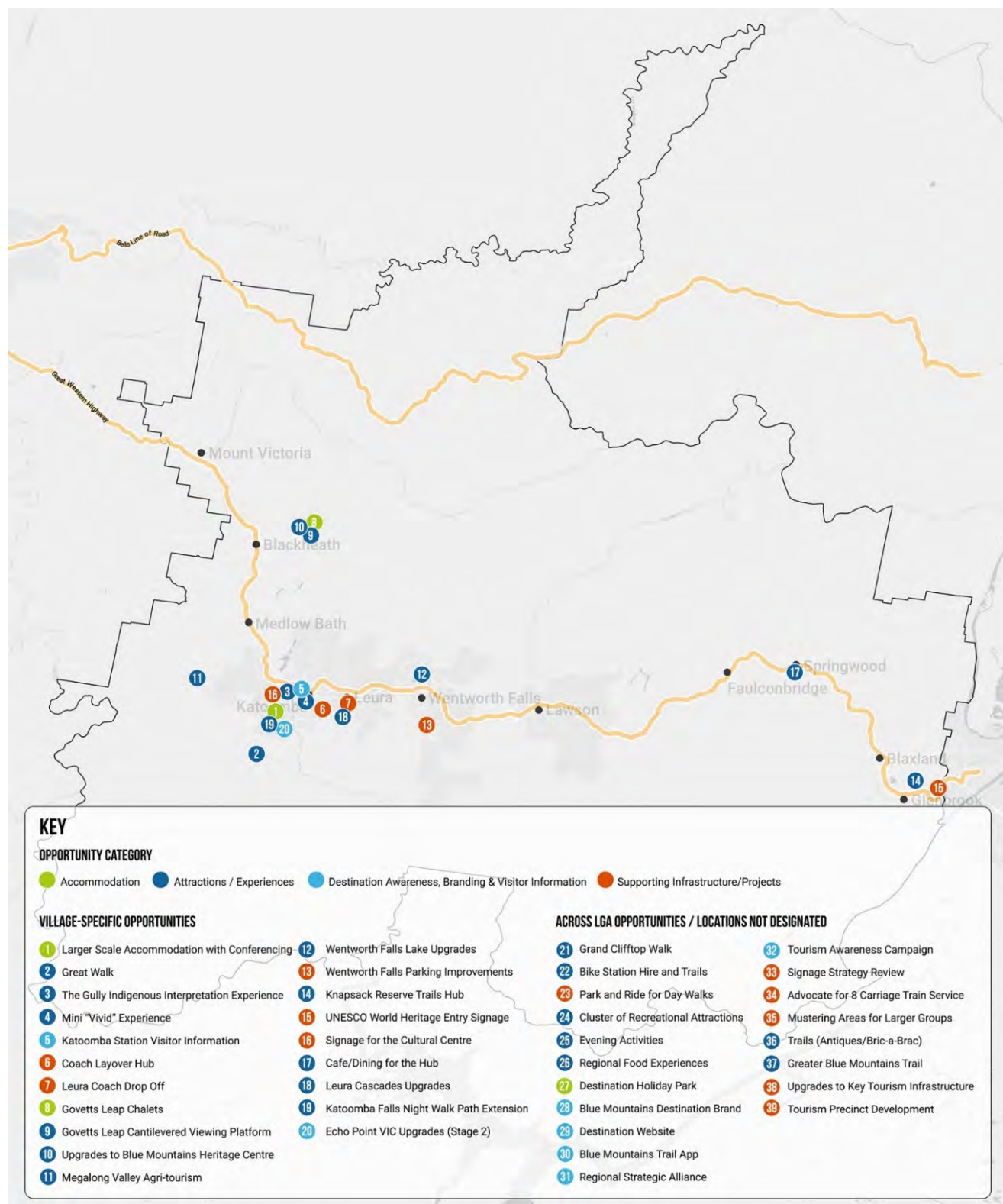


Table 1 provides a summary of each opportunity identified (in alphabetical order). Many of the opportunities are subject to feasibility studies, investigative work and planning approvals. They are suggested within this DMP as opportunities to explore to grow the visitor economy and to address identified challenges.

Table 1: Overview of the Opportunities

ACCOMMODATION	Destination Holiday Park: Identify a site for a higher quality destination holiday park able to offer 25+ chalets, 80+ powered caravan/RV sites, 100+ camping sites, water features and other supporting infrastructure.
	Govetts Leap Chalets: Investigate the potential for small-scale eco-friendly chalets at the picnic ground at Govetts Leap (this could position Govetts Leap as a significant site and offer the NPWS an attractive revenue stream).
	Larger Scale Accommodation Property with Conference Facility: Consider the development of a 250-350 room property which blends in and complements the natural environment with an attached conference facility (650 – 850 max). This could include an outdoor amphitheatre (with appropriate vegetated buffering from nearby residential areas) to hold outdoor concerts, plays and festivals etc. to meet a gap in the infrastructure available for outdoor events and to cater for local and visitor demand.
ATTRACTIONS/ EXPERIENCES	Bike Station Hire and Trails: Consider, given the recreational nature of the Blue Mountains and the distances between points of interest, the potential to introduce bike share docking stations in Katoomba, Blackheath, Leura, Glenbrook, Wentworth Falls and Springwood. The potential also exists to develop bike trails to profile food, arts, culture and heritage features.
	Café/Dining for the Blue Mountains Theatre and Community Hub: Investigate the introduction of a café or pop-up dining facility at the Hub to provide patrons with the opportunity to dine prior to or post the performance they are attending.
	Cluster of Major Visitor Recreational Attractions: Consider the development of a cluster of recreational attractions such as a zip line, treetop canopy walkway, Sky Zone-style trampoline and recreation centre, luge experience, BMX bike track or an outdoor adventure playground. This could benefit the local community, day and overnight visitors, healthy lifestyles and the under 10s and family market.
	Evening Activities: Investigate offering evening-based activities to encourage growth in the domestic and international overnight visitor market. The potential exists to offer: twilight concerts, evening walking tours, outdoor dining experiences, progressive dining walking tours, cultural shows, food/wine events and night markets offering food stalls etc.
	Grand Clifftop Walk Experience: Investigate the development and marketing of the GCTW as a series of half and one-day walking experiences using accommodation in villages along the route.
	Greater Blue Mountains Trail: Consider supporting the extension of the Greater Blue Mountains Trail for walking, cycling and running, including developing the trail as almost fully “off road” to ensure riders/walkers/runners can safely use the trail without competing with vehicles. The potential also exists to identify a range of commercial elements to support the extension, maintenance and marketing of the Trail, including tent/accommodation options, seasonal food and beverage providers, bike hire and tour providers etc.
	Great Walk: Investigate the development of a Great Walk to offer a multi-day guided experience, with accommodation in the BMNP (located in non-pristine areas such as existing camping grounds). This should be no more than a 3–4 day experience to meet the majority of market demand. It is important that the approval and support of the Gundungurra and Darug traditional owners is obtained for this.



Govetts Leap Cantilevered Viewing Platform: Consider, given that Echo Point's capacity is stretched at peak times, positioning Govetts Leap as an alternative to Echo Point. To do this, the following could be considered: the introduction of a larger viewing platform, potentially incorporating a cantilevered component; the development of a parking strategy; the upgrade and possible expansion of the toilet facilities; and improved visitor information including trail options.

Katoomba Falls Night Walk and Lights Experience Path Extension: Consider the development of a 250m extension to Scenic World of the Katoomba Falls Night Walk⁷ (a 1.1km night lit walk with landscape lighting of the gullies, falls and escarpments).

Knapsack Reserve Trails Hub: Investigate introducing a mountain bike hub for riders which could also host events, orienteering competitions and trail/cross country running events etc. The mountain bike hub could include: a small-scale seasonal shop selling and hiring mountain bikes and related equipment; a pop-up café facility which could operate during peak periods and events; an information facility incorporated into the shop; a bike repair/maintenance facility; toilets and related amenities; a gold coin (or similar) bike wash facility; and upgraded parking. The facility could also incorporate a commercial operator, if interest exists, to provide mountain bike lessons, training courses and guided tours. This could be integrated into the Scenic Eastern Escarpment once the proposed masterplan is completed.

Leura Cascades Upgrades: Consider supporting, via destination marketing, Council's upgrades to the Leura Cascades Precinct⁸ which, when completed, may include: a night lit walkway; new lookout platforms (Elysian East, West and Olympian Lookouts); an upgrade of Solitary Restaurant; and new amenities.

Megalong Valley Agri-tourism: Investigate the development and promotion of agri-tourism to the Megalong Valley. The Valley stands out as a unique agricultural and associated tourism/recreational environment with a product base centred on: farm gate experiences; cellar door experiences; small scale cottage and chalet accommodation options; tea rooms and smaller cafés; and walking tracks and horse trails etc. A number of challenges need to be addressed to promote this such as road maintenance, directional signage and track maintenance etc.

Mini "Vivid" Experience: Consider the potential to expand the Culturescape event held which uses the façade of the historic Carrington Hotel to run throughout the main street of Katoomba and to other villages. The potential may also exist to run an evening street market in conjunction with this.

Regional Food Experiences: Look to package and promote food experiences available across the Blue Mountains, Hawkesbury and Penrith via the RSA. This could include: cooking schools; farm gate sales; growers' markets; farm and winery tours; and boutique cafés and restaurants who focus on local produce.

The Gully Indigenous Interpretation Experience: Consider the opportunity to better profile The Gully experience. Council, in collaboration with the Gundungurra and Darug traditional owners, have invested in The Gully to highlight its indigenous history through interpretation boards, walkways and boardwalks etc. There is an opportunity to better profile the experience to increase visitor awareness. Any tours would ideally need to be led by traditional owners.

Trails (Antiques/Bric-a-Brac): Investigate the introduction of antiques/bric-a-brac trails and an antiques event/show once the trails are developed.

Upgrades to Blue Mountains Heritage Centre (BMHC): Consider upgrading the BMHC to offer a highly interactive experience and to bring the historical information and artefacts "alive"⁹.

⁷ Due for completion 2017/18

⁸ To potentially take place from 2019/20 onwards

⁹ While we note NPWS is preparing to upgrade the BMHC, there is a need to ensure that for any upgrades undertaken, a highly interactive experience is able to be offered to maximise this important facility.



Wentworth Falls Lake Upgrades: Investigate introducing other elements at Wentworth Falls Lake in addition to the planned upgrades by Council¹⁰. Additional elements could include: offering recreational equipment for hire (paddle boats, paddleboards, kayaks and canoes); introducing a seasonal pop-up café; and developing a range of “on lake” play equipment such as floating decks, floating trampolines, inflatable slides etc. If this location is to be activated for tourism it will need these types of activities.

Blue Mountains Destination Brand: Consider the development of new destination brand components for the Blue Mountains. There is no need to create a new destination name (the “Blue Mountains” has considerable consumer awareness) but a tagline, a destination logo, a colour palette and other brand collateral could be considered.

Blue Mountains Trails App: Investigate the introduction of a Blue Mountains Trails app to provide reliable, up to date information on Council and the NPWS managed walking and cycling trails. The app could provide information on trail difficulty, access (by public transport and by car) and condition and well as offering links to commercial operators who provide accommodation, tours, experiences etc.

Destination Website: Consider the development of an official destination website which uses the new brand and which integrates an up-to-date events calendar.

Echo Point VIC Upgrades (Stage 2): Advocate for funding for Stage 2 of the Echo Point VIC upgrade. While funding for Stage 1 of upgrades to the VIC have been obtained, funding is still required for Stage 2. The upgrades should include interactive elements.

Katoomba Station Visitor Information: Consider improving visitor information at (or close by) Katoomba Railway Station to indicate: where Echo Point and other major visitor attractions are; what walking distances and times are between Katoomba Station and Echo Point; information on shuttle services and tours; what other experiences are on offer; and how to book experiences, transport, restaurants/café, shuttles taxis etc. This could include an automated and relocatable pop-up information solution.

Regional Strategic Alliance: Consider, once the RSA is formalised, the need to promote it to industry. Industry is particularly keen to have Council manage any regional tourism body formed because of the potential for higher transparency.

Tourism Awareness Campaign: Investigate the development of a tourism awareness campaign to promote the importance of the visitor economy to the Blue Mountains to the wider community.

Advocate for Additional 8 Carriage Train Services: Consider advocating for more train carriages on certain services from Sydney, particularly weekend and public holiday services. There is also a need for mountain bike storage.

Coach Layover Hub: Investigate the development of a coach layover hub to offer 20 – 30 coach parking spaces, including spaces for smaller buses which are increasingly coming to the Blue Mountains as the nature of tours change. The hub should support Katoomba and Leura. There is also a need to patrol the existing coach drop off areas and issue warnings if coach drivers are not abiding by the rules stipulated to ensure a transparent and equitable system of monitoring and managing parking sites.

¹⁰ Council was successful in applying for a grant via the National Stronger Regions Fund (NSRF) to complete upgrades to the parking and toilets and the development of a boardwalk. The total project cost is estimated at \$1.3m – 50% of this will be funded via Council and 50% via Federal Government (under the NSRF program). The estimated completion date of the project is 2018/19.



Leura Coach Drop Off: Investigate introducing a drop off parking space in Leura where coaches can safely let down their passengers and then move onto coach parking elsewhere while their passengers shop and have lunch in Leura¹¹.

Mustering Areas for Larger Groups: Investigate the need to introduce, at Echo Point and potentially other major lookout areas, a mustering area for groups of 30 – 50 people. The mustering area should include seating and cover to cater for days of inclement weather.

Park and Ride for Day Walks: Consider the introduction of supporting infrastructure, such as park and ride shuttle services¹², to support weekend/holiday demand at popular day walking experiences such as Wentworth Falls.

Signage for the Blue Mountains Cultural Centre (BMCC): Investigate the introduction of signage to increase the BMCC's presence for those travelling down Katoomba Street. The potential exists to develop a signage trail, potentially originating from Katoomba Station, which visitors can follow and which leads them to the BMCC.

Signage Strategy Review: Consider a review of the previous signage strategy and the development of an action plan for improving directional (wayfinding) and interpretive signage throughout the LGA. This will ensure there is consistency for all signage (static and electronic). The potential may exist to develop the strategy as an initiative of the RSA.

Tourism Precinct Development: Identify a suitable area for clustering various medium to larger scale tourism attractions and facilities, such as a larger scale accommodation and conference facility, a destination holiday park and larger tourism/recreation attractions.

UNESCO World Heritage Entry Signage: Highlight to visitors as they are travelling into the LGA, particularly via the M4 and Great Western Highway, that they are entering a UNESCO WHS. Signage could promote the uniqueness of the area, possibly highlighting attributes such as the fact that it covers one million hectares etc. If this is unable to be placed on major highways/motorways, Council should consider placing gateway signage at Council-owned locations such as the Glenbrook VIC, which would still be visible from the Great Western Highway.

Upgrades to Key Tourism Infrastructure: Monitor Council's approach to the Greater Sydney Commission for \$97.5m in funding for upgrades to bridges, the Echo Point VIC upgrades, trails, town centre improvements, public amenities and for various strategies and plans. It is anticipated that the feasibility studies which are needed to support various projects will also provide evidence of market demand and associated capital costs.

Wentworth Falls Parking Improvements: Investigate, in addition to resolving parking challenges in Katoomba and Leura, the need to improve parking at the Wentworth Falls Lookout area. Investigate whether a timed parking solution could be introduced to increase parking turnaround or whether pay for parking should be introduced.

¹¹ As identified in Council's Leura Tourist Bus Strategy as well as discussions with major bus tour company operators.

¹² We note this has been previously discussed in the development of Council's parking strategy and also in the user pays research undertaken by Council.

1.7. Priority Projects

Ten projects (Figure 5) have been categorised as high priority based on discussions with Council, the NPWS, Destination NSW (DNSW) and industry. They should be activated in the next 18 – 36 months.

Figure 5: High Priority Projects



1.8. Tourism Investment Project Estimates

This DMP has identified 39 tourism development opportunities¹³ to support and grow the visitor economy. Many of these opportunities will benefit local residents through increased amenities, services and employment opportunities.

The opportunities have been categorised according to whether they are:

- private/commercial projects: commercial tourism projects for the private sector to pursue and invest in;
- public/private projects: projects more likely to be activated through a public/private partnership (PPP) as public funding is required to leverage private sector investment; or
- public projects: projects which will need to be funded by the public sector as a commercial return is not possible.

Figure 6 shows the opportunities broken down by funding category: 67% public projects, 25% PPP initiatives and 8% private/commercial projects¹⁴. Figure 6 also shows top line estimated capex requirements. The total capex requirement is estimated at \$200.4m. Of this, public driven opportunities will total \$20.6m, private/commercial driven opportunities will total \$145m and PPP initiatives will total \$34.8m.

Though the majority of projects (67%) are public sector driven projects, the bulk of investment (72%) is anticipated to come from the private sector.

¹³ This includes the larger scale accommodation with conference project which includes sub-projects being the accommodation property, conference centre, external event amphitheatre, and new major car parking station. If the four-subjects are amalgamated into the one project, there have been 39 projects in total identified as part of this DMP.

¹⁴ Note the accommodation development also has a number of PPP projects which would most likely be funded primarily by private sector sources and, therefore, has been included in the total project count as a private project.

Figure 6: Project Type and Projects by Estimated CAPEX

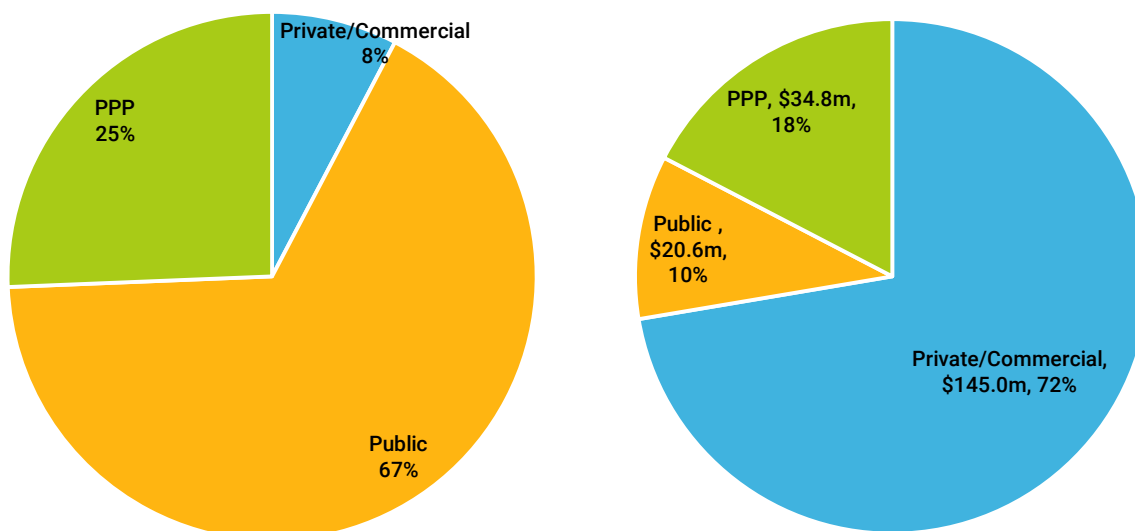


Table 2 demonstrates the estimated CAPEX costs, broken down by project. This is purely indicative. The projects will require detailed feasibilities to be undertaken.

Table 2: Tourism Project Investment Quantification¹⁵

Tourism Development Opportunities	Feasibility, Marketing or Development	Indicative Quantum \$	Funding		
			Private/ Commercial	Public	Public/Private Partnership
Accommodation					
Destination Holiday Park	Development	\$20.0m	\$20.0m		
Govetts Leap Chalets	Development	\$5.0m			\$5.0m
Larger Scale Accommodation Property with Conferencing (200 - 250 rooms)	Development				
Accommodation	Development	\$75.0m	\$75.0m		
Conference Venue	Development	\$25.0m	\$25.0m		
External Event Amphitheatre	Development	\$2.5m			\$2.5m
New Car Parking Station	Development	\$20.0m			\$20.0m
Bike Station Hire and Trails	Feasibility	\$40k			\$40k
Café/Dining for the Blue Mountains Theatre and Community Hub	Feasibility	\$35k			\$35k
Cluster of Major Visitor Recreational Attractions	Development	\$25.0m	\$25.0m		
Evening Activities	Marketing	\$100k			\$100k
Grand Clifftop Walk	Marketing	\$70k		\$70k ¹⁶	
Greater Blue Mountains Trail	Development	\$4.5m		\$4.5m	
Great Walk	Development	\$3.5m			\$3.5m
Govetts Leap Cantilevered Viewing Platform	Development	\$3.5m		\$3.5m	
Katoomba Falls Night Walk and Lights Experience Path Extension	Development	\$400k		\$400k	
Knapsack Reserve Trails Hub	Development	\$2.0m		\$2.0m	

¹⁵ Indicative indicates only a rough estimate as no pre-feasibility or assessment has been completed

¹⁶ Modifying the GCTW to go from Wentworth Falls to Blackheath rather than Mount Victoria, is estimated to cost \$12m rather than \$18m, as advised by Council. Further information is required however, to support a series of half day and day clifftop walks which will have sufficient appeal to both domestic and international market.



Tourism Development Opportunities	Feasibility, Marketing or Development	Indicative Quantum \$	Funding		
			Private/Commercial	Public	Public/Private Partnership
Leura Cascades Upgrades	Development	\$4.0m		\$4.0m	
Megalong Valley Agri-tourism	Feasibility & Marketing	\$45k			\$45k
Mini "Vivid" Experience	Marketing	\$50k		\$50k	
Regional Food Experiences	Marketing	\$35k			\$35k
The Gully Indigenous Interpretation Experience	Marketing	\$30k		\$30k	
Trails (Antiques/Bric-a-Brac)	Marketing	\$20k			\$20k
Upgrades to Blue Mountains Heritage Centre	Development	\$2.25m		\$2.25m	
Wentworth Falls Lake Upgrades	Development	\$2.5m		\$2.5m	
Destination Awareness, Branding and Visitor Information					
Blue Mountains Destination Brand	Marketing	\$60k		\$60k	
Blue Mountains Trails App	Development	\$60k		\$60k	
Destination Website	Development	\$60k		\$60k	
Echo Point VIC Upgrades (Stage 2)	Development	n/a		n/a	
Katoomba Station Visitor Information	Feasibility	\$40k			\$40k
Regional Strategic Alliance	Marketing	\$60k		\$60k	
Tourism Awareness Campaign	Development	\$20k		\$20k	
Supporting Infrastructure/Projects					
Advocate for 8 Carriage Train Service	n/a	n/a		n/a	
Coach Layover Hub	Development	\$3.5m			\$3.5m
Leura Coach Drop Off	Development	\$820k		\$820k	
Mustering Areas for Larger Groups	Feasibility	\$30k		\$30k	
Park and Ride for Day Walks	Feasibility	\$25k		\$25k	
Signage for the Cultural Centre	Development	\$100k		\$100k	
Signage Strategy Review	Feasibility	\$25k		\$25k	
Tourism Precinct Development	n/a	n/a		n/a	
UNESCO World Heritage Entry Signage	Feasibility	\$35k		\$35k	
Upgrades to Key Infrastructure	n/a	n/a		n/a	
Wentworth Falls Parking Improvements	Feasibility	\$30k		\$30k	
Total		\$200.4m	\$145.0m	\$20.6m	\$34.8m

1.9. Forecasts

1.9.1. Visitation

The following visitor forecasts (Table 3) are based on three scenarios (low, medium and high growth) and are provided to assist with future planning and capacity estimates for high use sites such as Echo Point.¹⁷

At peak periods and over most weekends, many sites are already at or near capacity. Whilst a focus on growing visitor yield is important, the organic growth of visitor numbers is likely to occur on a parallel basis. A "do nothing" scenario is not considered a viable option as visitor growth will continue regardless.

¹⁷ Forecasts are based on a range of factors including discussions with stakeholders including DNSW, major coach touring companies, tourism operators and accommodation providers within the region and externally, as well as The Group's experience within the tourism sector.

Table 3: Visitor Growth Forecasts¹⁸

	2016f ¹⁹	2020f	2025f	Total Change (2016 – 2025)	Change %
Low Growth					
Domestic Day	1.55m	1.63m	1.71m	160k	10%
Domestic Overnight	531k	558k	588k	56k	11%
International Day	972k	1.03m	1.09m	114k	12%
International Overnight	51k	53k	56k	5k	10%
Total	3.11m	3.27m	3.44m	336k	11%
Medium Growth					
Domestic Day	1.56m	1.68m	1.80m	231k	15%
Domestic Overnight	534k	571k	612k	78k	15%
International Day	984k	1.08m	1.17m	187k	19%
International Overnight	51k	54k	58k	7k	13%
Total	3.13m	3.38m	3.64m	503k	16%
High Growth					
Domestic Day	1.59m	1.80m	2.04m	452k	28%
Domestic Overnight	544k	678k	937k	393k	72%
International Day	1.01m	1.20m	1.42m	415k	41%
International Overnight	52k	65k	91k	39k	76%
Total	3.20m	3.75m	4.50m	1.30m	41%

1.9.2. Forecast Demand for New Hotel Rooms

A separate analysis has been undertaken of demand for higher quality hotel room stock out to 2025. It is based on visitation forecasts and information provided by existing hotel operators. This is also needed to support State Government's 2020 goal of doubling overnight visitor spend.

The findings indicate that additional higher quality room stock is forecast to be required by 2022 under the medium growth scenario and by 2020 under the high growth scenario.

To support this, planning should commence in 2017–2018, noting the 3–4 year planning, approval and construction period required.

1.10. Summary

The Blue Mountains is one of only a handful of leading international tourism brands within NSW. To improve its positioning, market appeal and sustainability, the opportunities outlined above need to be pursued. At a start, tourism activity should be focused in the well-defined area between Wentworth Falls and Blackheath. With so much supporting infrastructure and product in this area already, it is important that solutions leverage off this.

It will also be important to balance sustainable tourism and associated economic benefits such as local employment, with maintaining the local amenity for residents. With limited site options available (due to the constrained urban footprint), a master-planned approach is suggested.

Spreading tourism activity more widely (and more equitably) throughout the LGA will be particularly challenging unless supporting public infrastructure can be provided; this is likely to be both expensive and controversial with local residential communities.

¹⁸ The full forecasts can be found in Section 10 of the Supporting Documentation.

¹⁹ f = forecast.

This DMP aims to spread the visitor impacts more evenly across the week to manage visitor flows on weekends. Differential product pricing can be used to incentivise mid-week visitation particularly, for example, Council and the NPWS offering free parking Monday – Thursday but higher car parking rates from Friday – Sunday.

By adopting the 39 opportunities identified, the Blue Mountains can future-proof its tourism offering and attract higher yielding visitors.

Most importantly, the LGA cannot stand still and remain sustainable and competitive. Enhancements are required to existing product and new product is needed. There needs to be investment in supporting infrastructure to benefit the local community and the visitor market.



2. INTRODUCTION

2.1. Overview

The Group was commissioned by Council to complete the DMP for the LGA²⁰. The purpose of the DMP is to:

- help grow the visitor economy on a sustainable basis;
- provide solutions to various challenges facing the LGA to support sustainable tourism growth;
- identify new development and related solutions to attract investment and related economic benefits, such as employment;
- support future funding bids, including NSW State Government funding opportunities;
- provide direction on key marketing activities to support increased visitor demand for the Blue Mountains; and
- help build stronger local community awareness of the importance and value of the visitor economy.

2.2. Methodology

The process to complete this DMP has involved the following.

- Liaison with Council and the Industry Reference Group.
- An ongoing literature review.
- Consultation with Council, tourism industry stakeholders and community groups²¹.
- Desktop research, including a full audit of tourism product.
- Discussions with DNSW to collect visitor data.
- Visits to the LGA to review product, to meet with operators, to assess new opportunities and development sites and to test initial concepts.
- Liaison with Council and NPWS to review nature-based tourism product.
- Liaison with industry operators (accommodation providers, food and beverage providers, farm operators, attraction operators, transport providers etc.).
- Site visits to view precincts operating on weekends etc.
- Development of concept drawings for key opportunities.
- Analysis of challenges and opportunities.
- Completion of visitor forecasts.
- Development of an action plan.
- Compilation of findings into a draft DMP.
- Public exhibition of the draft DMP.
- Integration of public feedback on the draft DMP.
- Completion and presentation of the final DMP.

²⁰ Throughout this DMP, when the term “the Blue Mountains” has been used, this refers to the Blue Mountains LGA, rather than the old RTO region which included the LGAs of Lithgow and Oberon.

²¹ A full list of those consulted with, as well as those stakeholders who were contacted to participate in consultation, has been included in Section 1 of the Supporting Documentation.

The Group would like to thank all stakeholders who kindly provided their time, feedback and data. Their commitment and passion to ensuring the Blue Mountains can grow its visitor economy on a sustainable basis has been a key factor underpinning this DMP.

Many issues and options have been canvassed over many years for the Blue Mountains. There is significant pressure from stakeholders now to make final decisions on some of these options. This DMP, therefore, has not shied away from offering conclusions on many of these.

Most major stakeholders are keen to ensure that the focus on tourism is less heavily weighted on the BMNP and WHA. Whilst these assets are a dominant feature of the landscape, they are not the only reason people come to the LGA. This DMP, therefore, offers opportunities which encourage greater visitor dispersal, including mechanisms to relieve pressure on key locations in the BMNP. This outcome is seen to support greater environmental sustainability and improved economic outcomes for the local community.

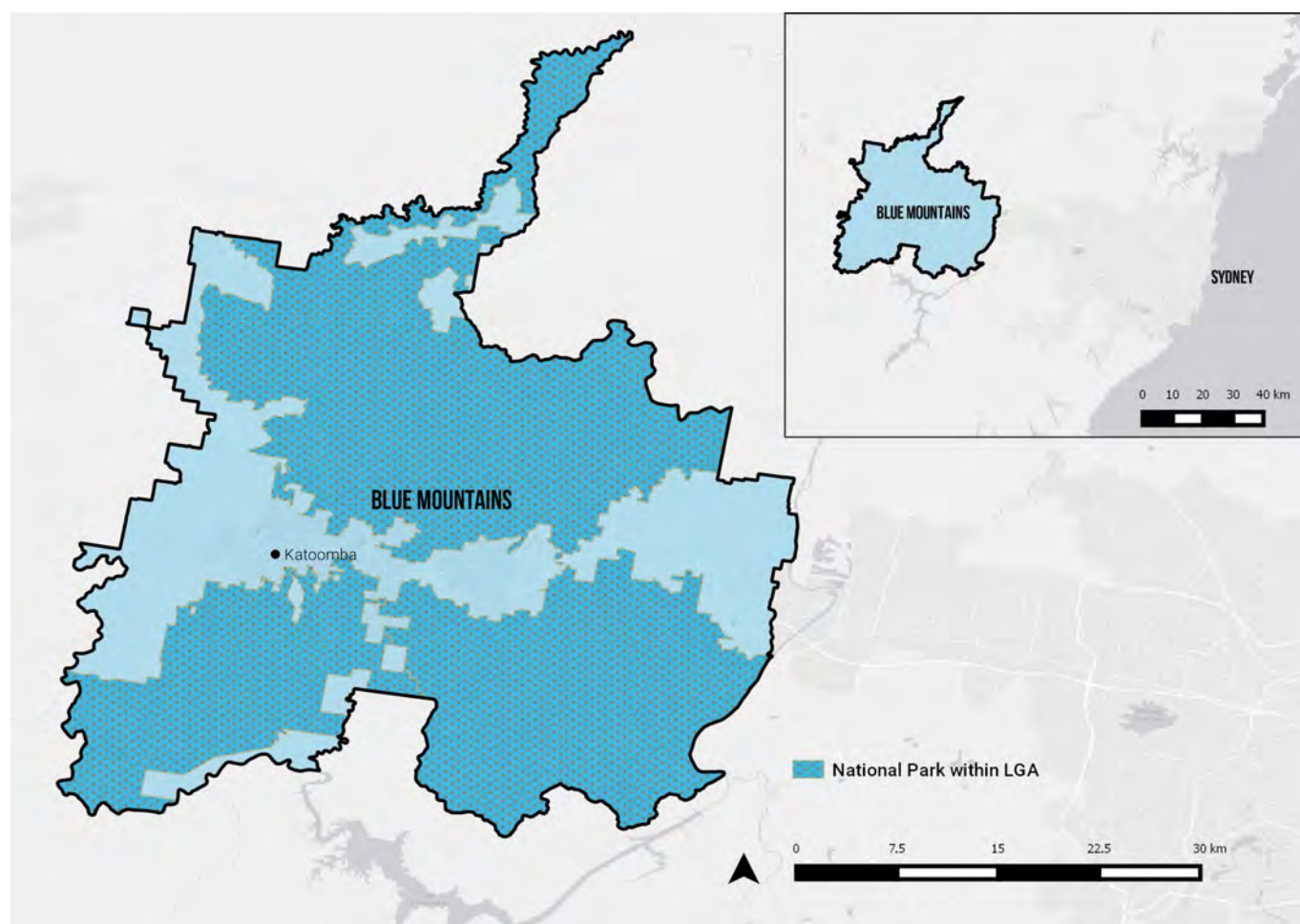


3. CONTEXT

3.1. About the LGA

The LGA is unique, with significant natural landscapes and cultural heritage. Situated 120km west of Sydney's CBD and 80km²² from Parramatta, Katoomba is the administrative centre of the LGA (Figure 7). The Blue Mountains is home to 27 other townships and villages, including Blackheath, Blaxland, Glenbrook, Lawson, Leura, Mount Victoria, Springwood and Wentworth Falls. It covers 1,431 square kilometres. Of this, 70% is the BMNP and 7% (~10,000ha) is Council-managed reserves and protected areas²³. Only 11% of the land is under private ownership²⁴ and the urban footprint of the LGA is constrained to less than 430 square kilometres (30%)²⁵.

Figure 7: Map of the Blue Mountains LGA²⁶



²² Road network distance

²³ Based on Council feedback

²⁴ Blue Mountains Demographic and Economic Profile, 2014, Blue Mountains Economic Enterprise

²⁵ Calculated as 30% of total LGA area.

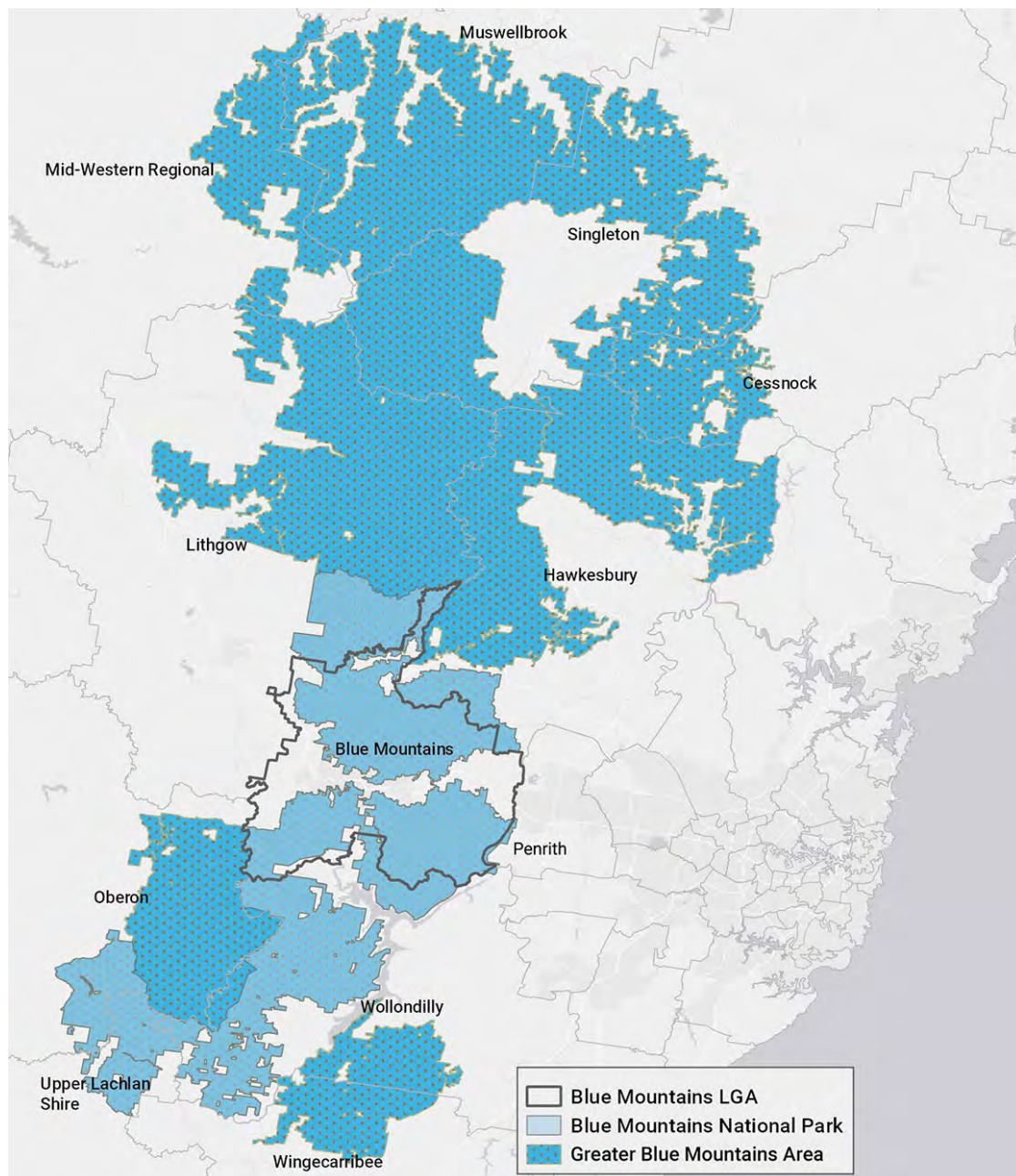
²⁶ Based on data from ABS, Esri, HERE, DeLorme, © OpenStreetMap contributors, and the GIS user community

As part of the Greater Blue Mountains Area (a WHS), the Blue Mountains offers iconic natural assets. Within its boundaries, the LGA offers a diverse range of landforms, including sandstone plateaus, escarpments, gorges and waterfalls, as well as its temperate eucalypt forest, which attracts visitors from within Australia and around the world.

While the natural landscape is a focus of tourism activity, there are also a variety of Indigenous and European cultural and historic attractions in the area, including art galleries, dining, shopping and day spas. These are scattered among each of the villages, particularly Katoomba, Leura, Blackheath, Glenbrook, Springwood and Wentworth Falls.

Figure 8 shows the area covered by the GBMA, the BMNP and the boundary of the LGA. The LGA is considered the key gateway into the WHS.

Figure 8: Blue Mountains National Park within the Greater Blue Mountains Area²⁷



²⁷ Based on data from ABS, © Commonwealth of Australia, Esri, HERE, DeLorme, © OpenStreetMap contributors, and the GIS user community

3.2. Literature Review

Details of the literature review are at Section 2 of the Supporting Documentation.

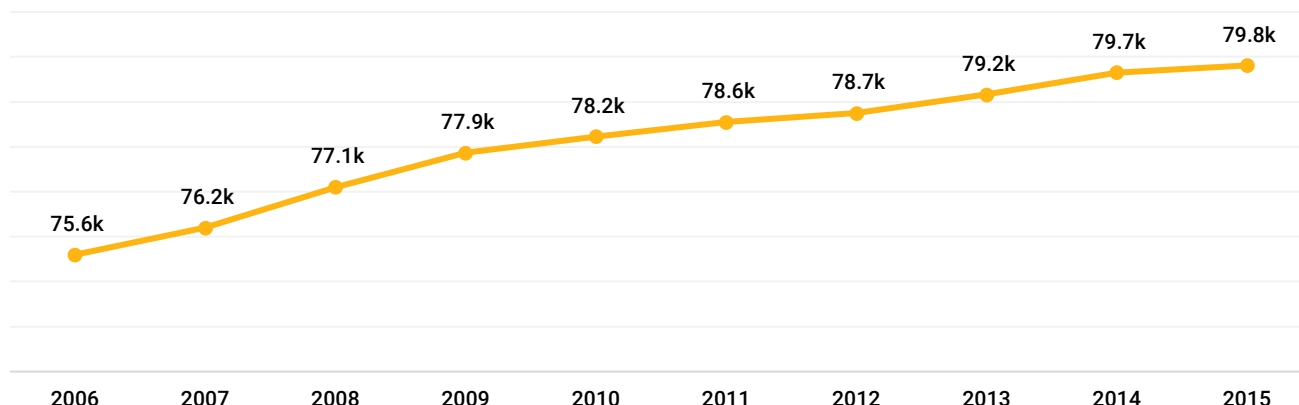
3.3. Demographics

3.3.1. Population Trends

The Blue Mountains is home to 79,812 residents (as at 2015). Over the past 10 years, the LGA's population has had minimal growth, averaging 0.6% growth (or 468 residents) per annum. Figure 9 shows population growth over the period 2006-2015.

Compared to many other areas in Western Sydney, the population growth has been low.

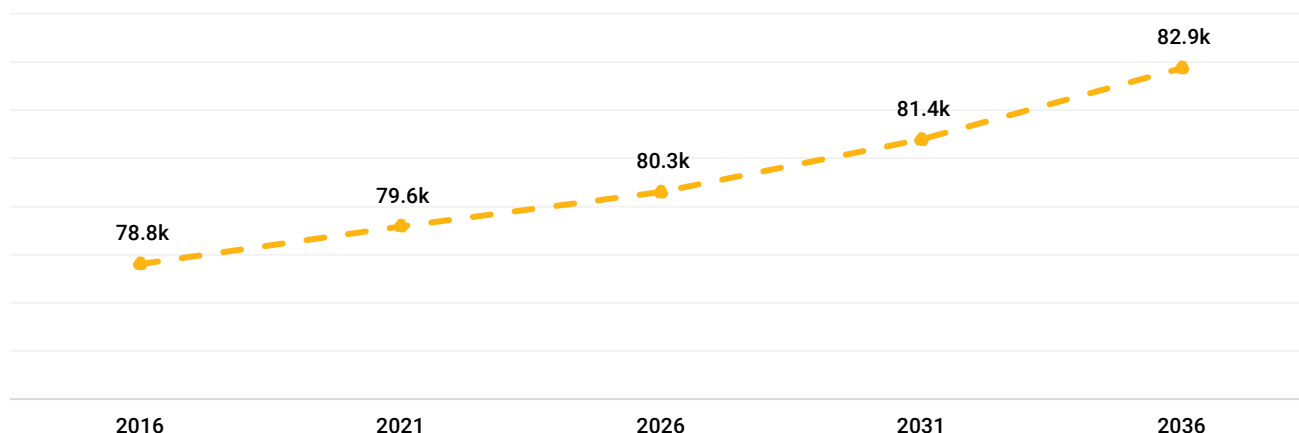
Figure 9: Blue Mountains LGA Population Historic Trend²⁸



3.3.2. Population Forecasts

Figure 10 shows population forecasts for the LGA from 2016 – 2036. The LGA's population is anticipated to continue to grow slowly, increasing to 82.9k residents by 2036 (an increase of just under 4% from 2015). This limited growth is important to note because, in the absence of strong population growth, it will be important to attract a visitor market to support not only existing businesses but also any future business growth.

Figure 10: Blue Mountains LGA Population Forecasts²⁹



²⁸ <http://profile.id.com.au/blue-mountains/population-estimate>

²⁹ <http://forecast.id.com.au/blue-mountains/population-households-dwellings>

3.3.3. Population Age Structure

As demonstrated in Table 4, the Blue Mountains' population is ageing.

- From 2001 – 2011, the number of residents aged between 0 – 49 has declined (by 11%), while the number of residents aged 50 and above has increased (by 32%).
- The number of “empty nesters” and retirees (60 – 69 years) has grown by 67% (or 3,840 residents).
- There is an under-representation of the 18 – 24-year-old age group (with a 6% decline from 2001-2011) due, in part, to:
 - a lack of universities and higher education facilities in the LGA³⁰; and
 - youth unemployment, with 12.7% of the Blue Mountains' labour force in the 15-24 age category classed as unemployed (in 2011), with some suburbs, such as Falconbridge, Leura and Winmalee having significantly higher levels of youth unemployment (22.8%, 18.5% and 17.9% respectively).³¹

Whilst an ageing population can present a variety of benefits such as increased volunteer participation and community spirit, it also can result in various challenges, including increased pressure on infrastructure and services³², increased spending on health care, a shortage of workers and the potential need to increase rates. The ageing population may also mean that some businesses may need to attract a workforce which is non-resident in the LGA (the under-representation of the 18-24-year-old age group can be particularly challenging for tourism and hospitality businesses who often rely on this age group to provide part-time and contract positions for food and beverage outlets etc.).

Table 4: Blue Mountains Age Structure, 2011³³

Age Group	2001	2001%	2006	2006%	2011	2011%	Change 2001 - 2011	% Change 2001 - 2011
Babies and pre-schoolers (0 - 4)	4,870	7%	4,711	6%	4,697	6%	-173	-4%
Primary schoolers (5 - 11)	7,774	10%	7,106	10%	7,042	9%	-732	-9%
Secondary schoolers (12 - 17)	6,970	9%	6,688	9%	6,184	8%	-786	-11%
Tertiary education & independence (18 - 24)	5,983	8%	5,874	8%	5,614	7%	-369	-6%
Young workforce (25 - 34)	8,677	12%	7,666	10%	6,998	9%	-1,679	-19%
Parents and homebuilders (35 - 49)	17,830	24%	16,692	23%	15,986	21%	-1,844	-10%
Older workers & pre-retirees (50 - 59)	9,858	13%	11,361	15%	12,019	16%	2,161	22%
Empty nesters and retirees (60 - 69)	5,689	8%	6,992	9%	9,529	13%	3,840	67%
Seniors (70 - 84)	5,551	7%	5,730	8%	6,318	8%	767	14%
Elderly (85 & over)	1,107	1%	1,239	2%	1,555	2%	448	40%

³⁰ Which may mean that those wishing to pursue further study need to relocate to Sydney or other regional areas that have a university

³¹ Blue Mountains City: Youth unemployment rate (persons aged 15-24), 2011, atlas.id

³² The dependency ratio identifies the proportion of the population not in the work force and who are, therefore, 'dependent' on those of working-age.

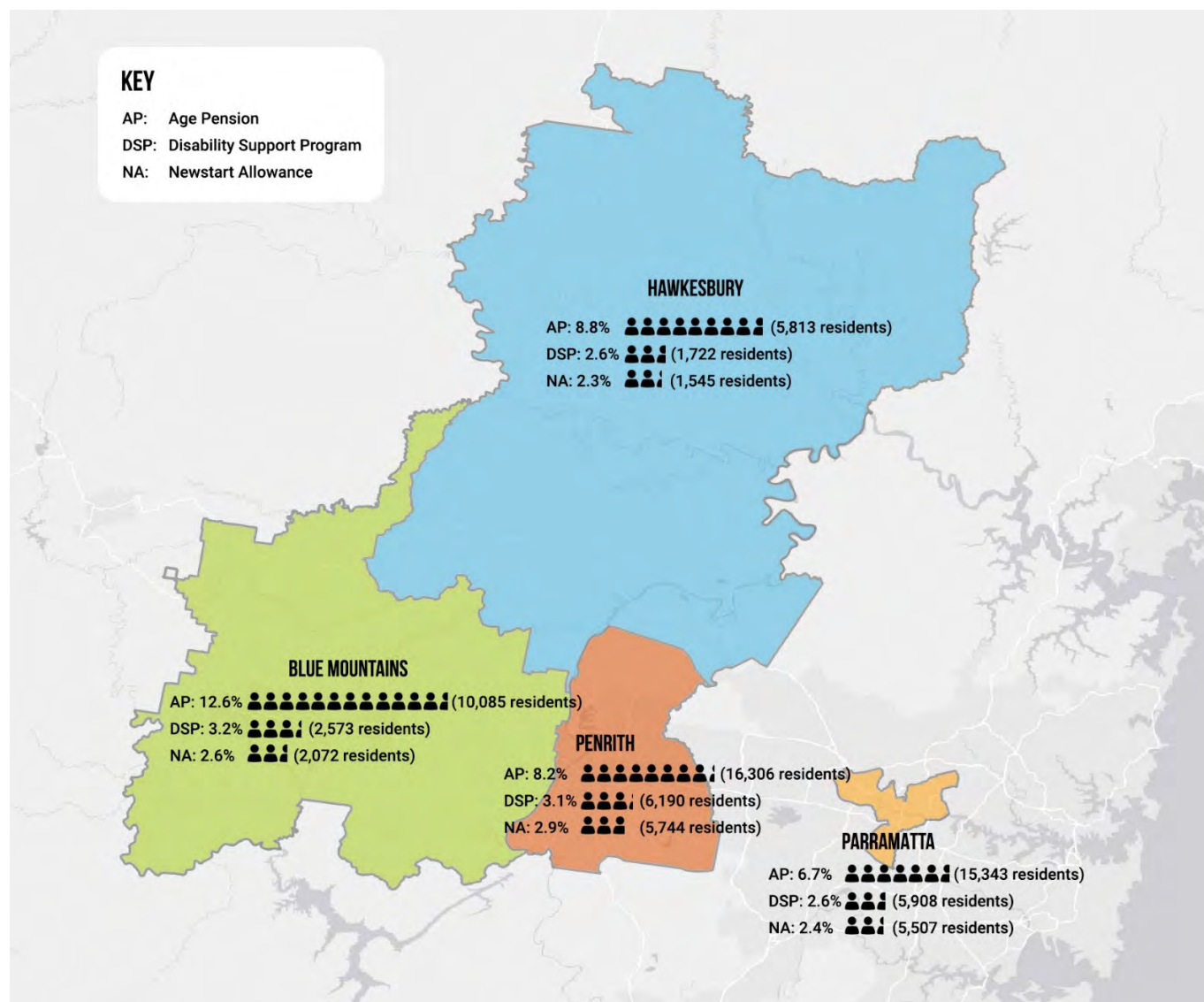
³³ Community Profile: Blue Mountains City: Five year age groups, profile.id

3.3.4. Social Welfare

Compared to neighbouring LGAs, the Blue Mountains has a higher percentage of its population receiving the Age Pension, Disability Support Program (Figure 11). This demonstrates the ageing demographic of the LGA.

As the population continues to age, there will be a commensurate need to grow the economy to support the population. Growing the visitor economy may provide the opportunity to better support an ageing population through the provision of more local employment, services, and public amenities.³⁴

Figure 11: Selected Social Welfare Payment Data, 2016³⁵



³⁴ Blue Mountains Tourism Industry Profile, 2014/15, p. 7, BMEE

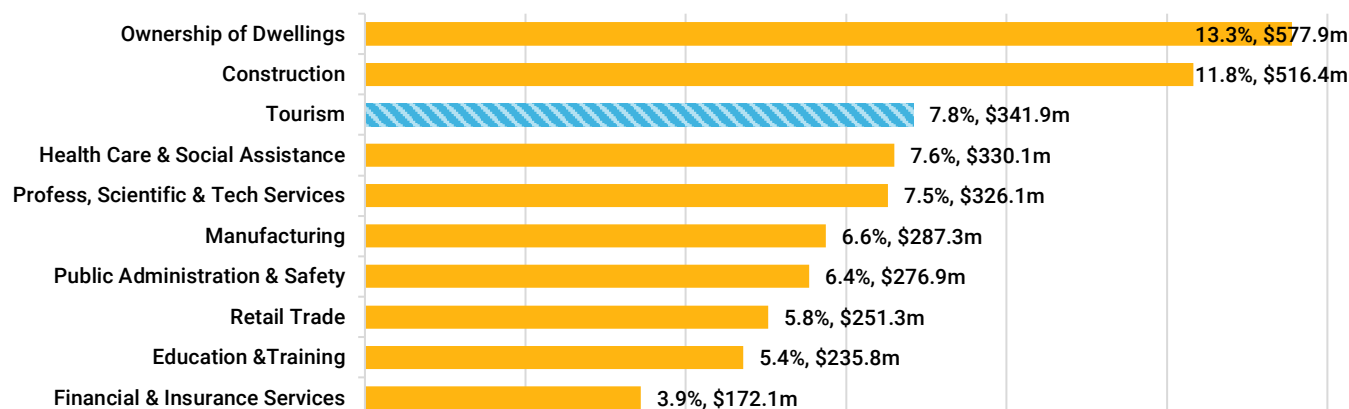
³⁵ Social Welfare numbers from March 2016: <http://data.gov.au/dataset/dss-payments-by-local-government-area>; Population for each LGA from June 2015 from profile.id

3.4. The Importance of Tourism

3.4.1. Output

Tourism is the third largest sector (in terms of output) in the Blue Mountains and accounts for just under \$342m in output. The sector accounts for 7.8% of total economic output in the LGA, compared with a State average of 3.2%. If "Ownership of Dwellings³⁶" is removed from the output assessment, tourism ranks 2nd and contributes to 14% of total output. This demonstrates that the Blue Mountains is more reliant on tourism as an economic generator for the LGA. There is a need, therefore, to ensure that tourism continues to grow sustainably to support the Blue Mountains' economy.

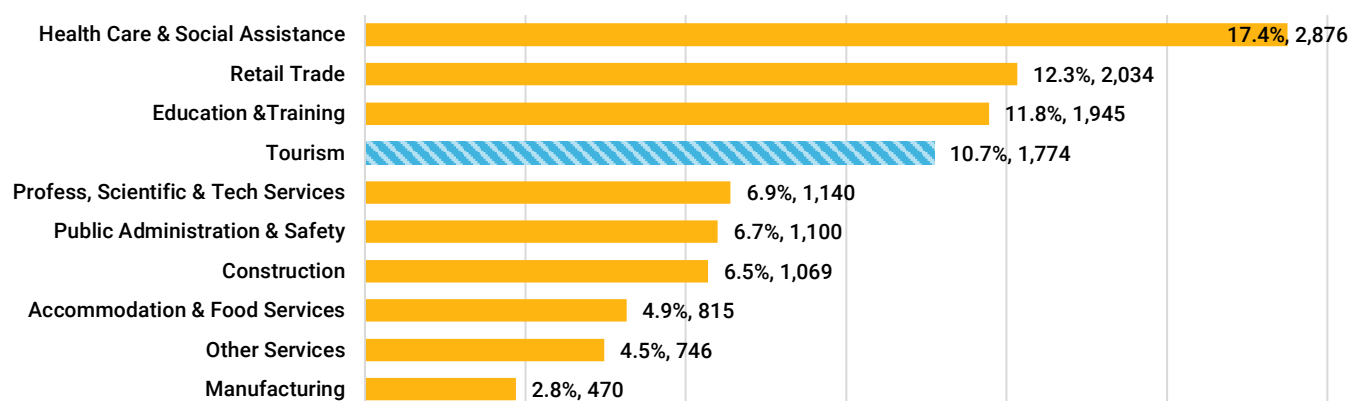
Figure 12: Blue Mountains Output (2013/14)³⁷



3.4.2. Employment

The importance of tourism to the Blue Mountains is also demonstrated via employment statistics. Figure 13 shows that tourism accounts for 10.7% of all jobs and ranks fourth in terms of job creation (after health care and social assistance, retail trade and education and training). Growing tourism in a sustainable manner should support additional job creation in the LGA. Currently, 56% of the working population travels outside the LGA for employment³⁸. The creation of additional jobs in the LGA will assist a percentage of these residents to reduce their journey to work time.

Figure 13: Blue Mountains Employment (2013/14)³⁹



³⁶ Refers to "landlords and owner-occupiers of dwellings. Owner-occupiers are regarded as operating a business that generates a gross operating surplus." We consider when assessing the importance of tourism from an economic perspective, this category should be removed as the economic value it generates in terms of jobs is very limited, particularly when compared with tourism and all other sectors.

³⁷ <http://www.economicprofile.com.au/bluemountains/tourism/output>, based on 2013/14 data.

³⁸ <http://www.economicprofile.com.au/bluemountains/workers/live-in/place#table>

³⁹ <http://www.economicprofile.com.au/bluemountains/tourism/employment>, based on 2013/14 data

3.5. Visitation

3.5.1. Methodology

Figure 14 provides a breakdown of visitation based on visitor type, (domestic day, domestic overnight, international day and international overnight visitation) for the four-year period from 2012-2015. The raw data (provided by DNSW) excluded international day visitors. Based on discussions with DNSW, in excess of 960k international day visitors travelled to the Blue Mountains region in 2015; this figure has, therefore, been included in the data assessment.⁴⁰ In the absence of an estimate for international day visitors for 2012 - 2014, the international day trip figure for 2015 of 960k has been applied to each of the years assessed based on feedback from inbound operators.

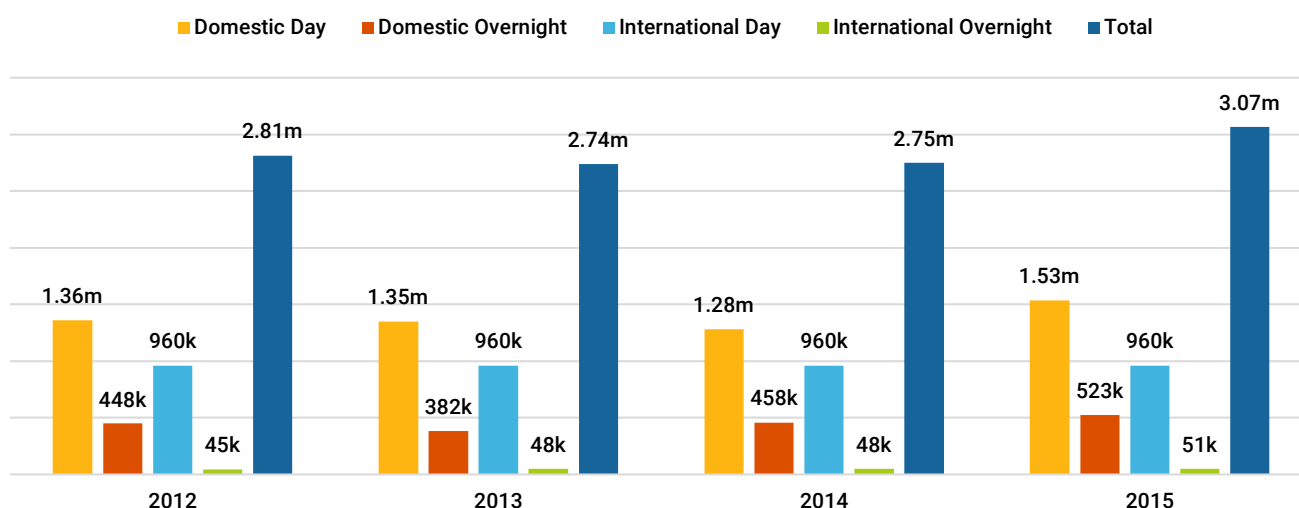
3.5.2. Total Visitation

In 2015, visitation to the LGA increased to 3.07m visitors. Over the four-year period, visitation, on average, grew by 3% per annum (or 84,532 visitors per annum). In each year assessed, almost half of total visitation was undertaken by domestic day trippers (followed by international day trippers). For the most recent year's data (2015), 50% of visitors were estimated to be domestic day visitors, 31% to be international day visitors, 17% to be domestic overnight visitors and 2% to be international overnight visitors.

Whilst the importance of the day tripper market to the LGA needs to be recognised, day trippers spend far less than overnight visitors. Overnight visitors tend to contribute more to the economy through their spend on accommodation, food, beverages and transport etc. The latest tourism expenditure data demonstrates that domestic overnight visitors contribute more than four times the spend of a domestic day tripper (\$360 per trip compared with \$86).⁴¹

During peak visitor periods and major events, specific locations in the LGA reach capacity. Rather than looking to simply increase the number of visitors to the LGA, then, this DMP deliberately investigates opportunities to grow visitor yield and converting a proportion of day trippers into overnight visitors. The aim of doing so is to increase the economic benefit generated by the visitor economy, without impacting on resources/infrastructure in peak periods.

Figure 14: Blue Mountains Visitation Based on Visitor Type, 2012-2015⁴²



⁴⁰ From previous work undertaken in the LGA.

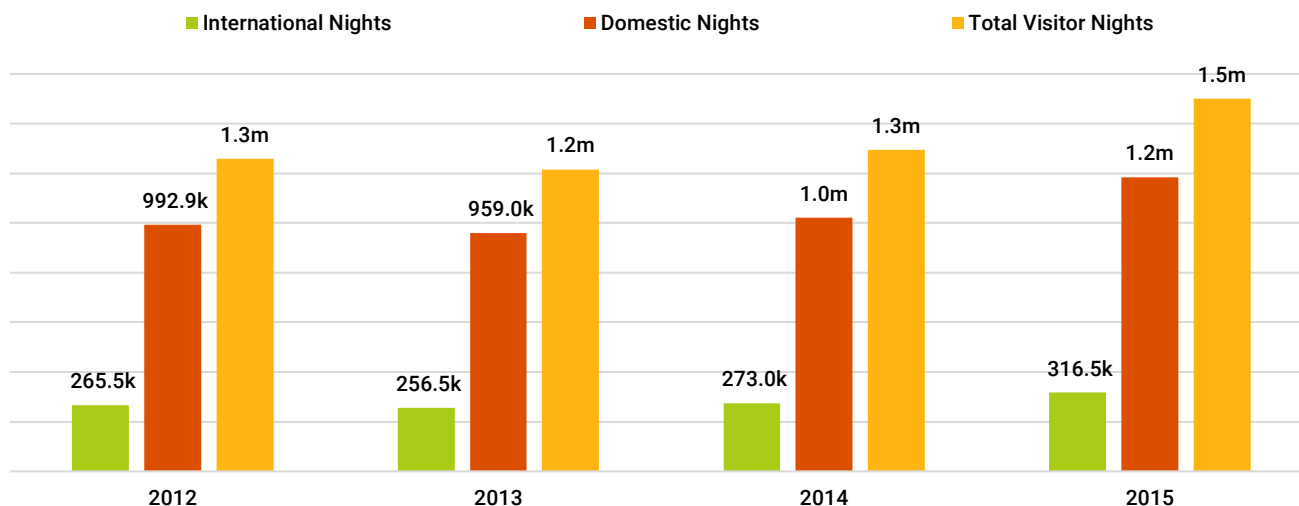
⁴¹ Special data request to DNSW, based on four year average from 2012 – 2015.

⁴² Based on a special data request from DNSW. Data reflects September YE periods.

3.5.3. Visitor Nights

Visitor nights in the LGA have increased in 2012 - 2015, from 1.3m to 1.5m (Figure 15). Most visitor nights (79%) are estimated to have been domestic visitor nights.

Figure 15: Blue Mountains Visitor Nights, 2012-2015⁴³



3.5.4. Accommodation Used

Table 5 provides a breakdown on estimated accommodation use in the LGA, based on visitor nights.⁴⁴ Private accommodation⁴⁵ comprises the majority of visitor nights (68% of total visitor nights, compared with 32% in commercial accommodation⁴⁶). This is particularly the case for domestic visitor nights, where an estimated 68% of visitor nights were spent in private accommodation (private accommodation includes holiday homes, staying with family and friends and rented short-term accommodation).

Table 5: Blue Mountains Accommodation Type (by Visitor Nights)⁴⁷

Estimated Accommodation Type (by Number of Nights)					
	2012	2013	2014	2015	% Split (4 Year Avg.)
International Nights	266k	256k	273k	316k	
Commercial	94k	90k	96k	112k	35%
Private	172k	166k	177k	205k	65%
Domestic Nights	993k	959k	1.0m	1.2m	
Commercial	314k	304k	323k	375k	32%
Private	679k	655k	698k	809k	68%
Total Visitor Nights	1.3m	1.2m	1.3m	1.5m	
Commercial	408k	394k	419k	486k	32%
Private	850k	821k	874k	1.0m	68%

⁴³ Based on a special data request from DNSW. Data reflects September YE periods.

⁴⁴ A more detailed breakdown of how this table was derived is included in the Supporting Documentation, Section 3.

⁴⁵ Includes DNSW categories of: Private accommodation, rented house/apartment and holiday homes.

⁴⁶ Commercial accommodation includes hotels, motels, resorts, backpackers/hostel, B&Bs, guest houses and caravans.

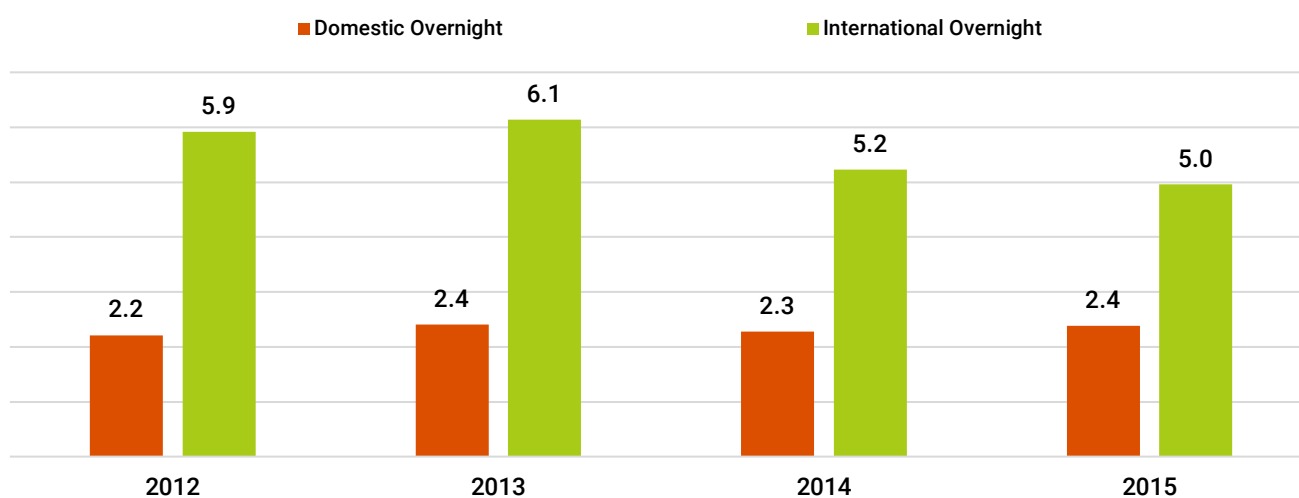
⁴⁷ Based on a special data request from as well as accommodation use breakdown provided in LGA Profile – Blue Mountains (4 Year Annual Average to year ending September 2014), DNSW.

3.5.5. Average Length of Stay

Figure 16 provides a summary of the average length of stay (ALOS) of overnight visitors from 2012 – 2015. Over the period, the ALOS has remained static, averaging 2.3 nights for domestic overnight visitors and 5.6 nights for international overnight visitors. The domestic overnight ALOS may reflect that the destination is positioned as a short-break getaway (2 nights) for the greater Sydney market.

The ALOS and spend for international visitors is skewed by international students and workers who stay in the LGA for longer periods of time. The ALOS for a “true” international visitor to the Blue Mountains (that is, those who are travelling for leisure etc.) is estimated to be similar to the domestic overnight visitor’s ALOS at 2.3 nights (4-year average from 2012 – 2015).

Figure 16: Blue Mountains Visitors’ Average Length of Stay, 2012-2015⁴⁸



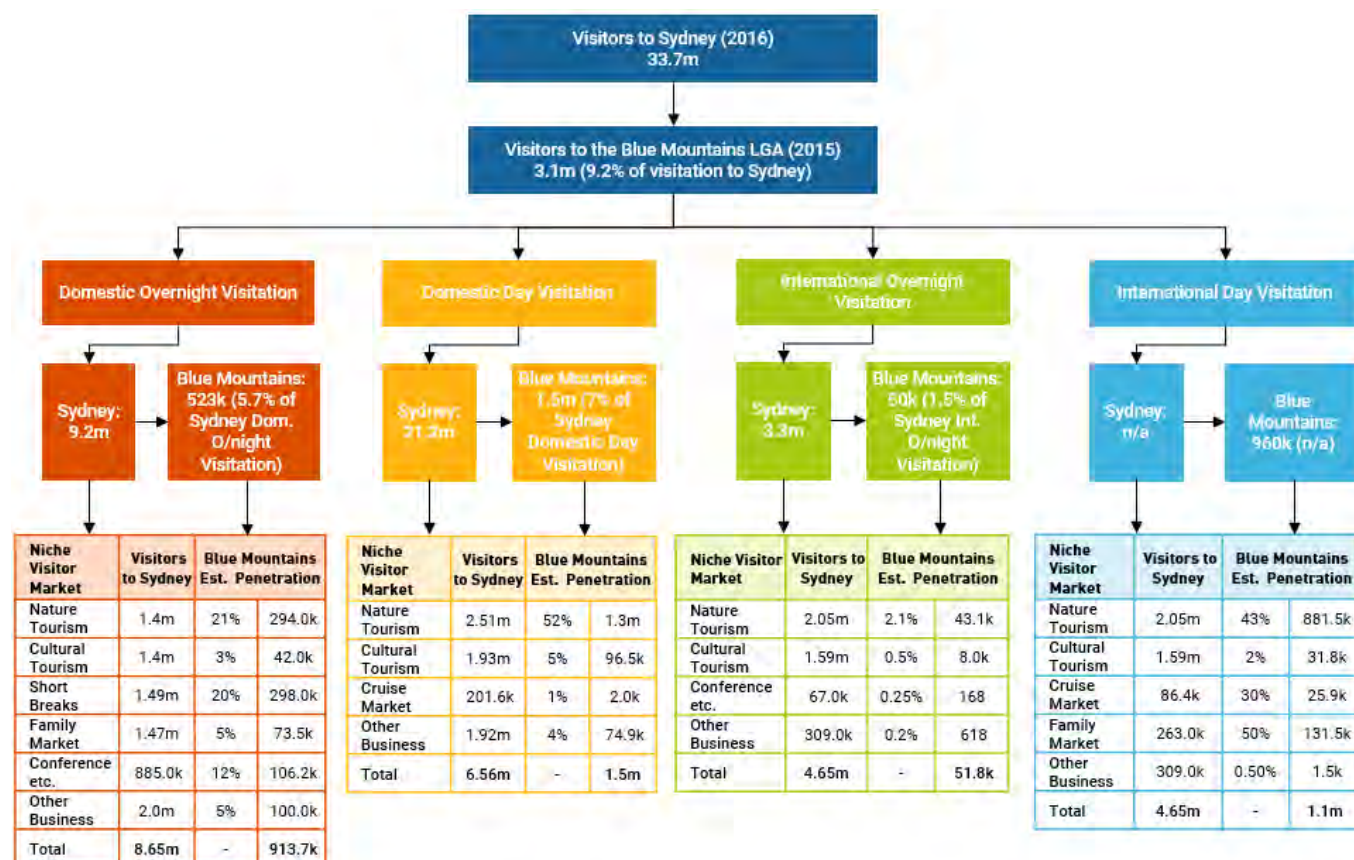
3.6. Niche Visitor Markets

Figure 17 illustrates the estimated percentage share the Blue Mountains has of the domestic and international visitor markets to greater Sydney⁴⁹. Whilst the Blue Mountains is not technically part of greater Sydney, a disproportionately high percentage of both domestic and international markets is generated there. The figure offers insight into segments where the Blue Mountains is seen to have a stronger market share and, conversely, niche markets where it appears to have a smaller share and where opportunities for new product development and marketing/promotional programs might be considered.

⁴⁸ Based on a special data request from DNSW. Data reflects September YE periods. Data only includes domestic overnight and international overnight figures.

⁴⁹ Based on the DNSW defined “Sydney and Surrounds” region.

Figure 17: Visitor Markets to the Blue Mountains⁵⁰



3.7. Key Market Demand Findings from Major Operators

Major accommodation operators identified the following market trends.

- Over 90% of guests are free independent travellers. Of these, 70% or more are domestic visitors, primarily from NSW.
- Of the domestic visitors staying overnight, 70% or more are from Sydney.
- For major attractions, those on inclusive tours is slightly less than those travelling as free independent travellers.
- The international overnight visitor market is characterised mostly by visitors from Europe, North America, UK and North Asia (China, Japan and South Korea).

The Sydney market is a significant driver of overnight visitation focused on business and conference attendees and, to a lesser extent, leisure. For the domestic leisure visitor, the Blue Mountains is primarily a day trip market that seeks out a mixture of events and nature walks. The day visitor leisure market is disproportionately high compared with the market staying overnight.

⁵⁰ Note: Niche markets do not add up to total market size (i.e. all niche domestic overnight visitor markets do not add up to total Blue Mountains domestic overnight visitation of 523k) because categories are not mutually exclusive – some visitors may fit into multiple categories (e.g. a visitor counted as a nature visitor may also be counted as a cultural visitor).

3.8. Visitor Expenditure

Table 6 breaks down visitor expenditure over the four years between 2012 – 2015. It demonstrates the value overnight visitors bring to the economy. While there are more than three times as many domestic day trippers than domestic overnight visitors, domestic overnight visitors contribute significantly more to the economy.

While international day trippers contributed more in terms of total spend than international overnight visitors, this is because of the sheer volume of international day trippers. When one assesses this in terms of per trip spend, international overnight visitors spend 5.6 times more than day visitors.

A key objective of this DMP is to investigate strategies to convert a portion of the large international and domestic day trip markets into an overnight visitation market.

Table 6: Visitor Expenditure (4 Year Average, 2012 – 2015)

	Average Visitation P/A	Total Spend	Spend Per Trip	Spend Per Day
Domestic Day	1,381,207	\$118m	\$86	-
Domestic Overnight	453,005	\$162m	\$360	\$155
International Day ⁵¹	960,000	\$95m	\$99	-
International Overnight	47,881	\$27m	\$555	\$100
Total	2,842,092	\$402m	-	-

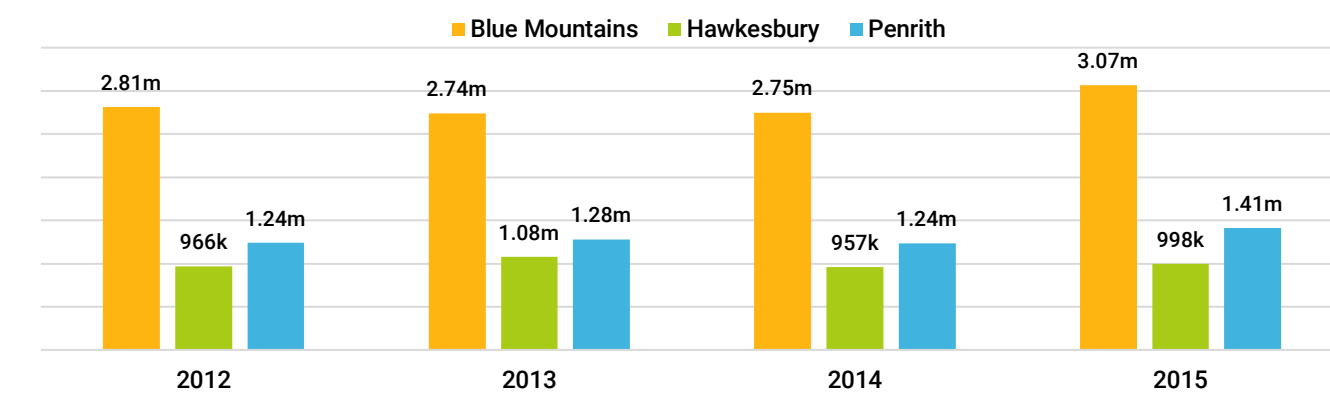
3.9. Comparative LGAs

To assess how the Blue Mountains performs in terms of visitation numbers etc., a comparative assessment was undertaken with surrounding LGAs.⁵² These LGAs form the RSA with the Blue Mountains.

3.9.1. Visitation

Total visitation across the LGAs was highest in the Blue Mountains (Figure 18). For each year assessed, visitation to the Blue Mountains was more than double visitation to Penrith, illustrating the strength of the Blue Mountains as a visitor destination, particularly given that Penrith now has a sizeable offering of adventure and recreation product.

Figure 18: Visitation for Comparative LGAs, 2012-2015⁵³



⁵¹ Note, international day expenditure is not available. The Group has used domestic day trip spend figures (as provided by DNSW) and applied an estimate which assumes that, on average, international day visitors spend 15% more than domestic day trippers.

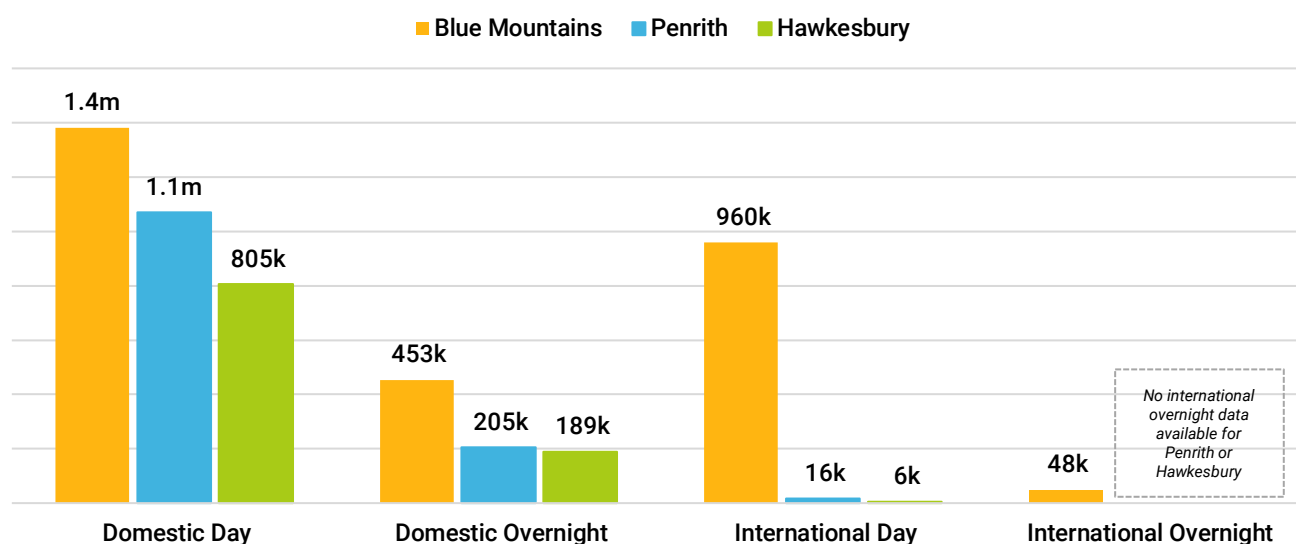
⁵² Wollondilly was initially included in the assessment, however, it has since been removed because of data sample size and reliability issues. The data provided by DNSW indicates that Wollondilly receives 42k international overnight visitors, compared with Penrith who receive 17k international overnight visitors. Based on work The Group has completed previously and consultation with industry operators, we consider the Wollondilly figures for visitation are overinflated.

⁵³ Based on a special data request from DNSW. Data reflects September YE periods. 960k visitors have been added to the Blue Mountains to reflect international day trip visitors.

Figure 19 provides a more detailed breakdown of visitation to each of the LGAs. It demonstrates the following.

- The Blue Mountains has a significantly higher level of international day visitation perhaps due to the strong international branding, World Heritage branding, the vast numbers of day trip tour buses which visit key points of interest such as the Three Sisters and the number of cruise ship packages which include day trip visits to the Blue Mountains.
- Domestic day visitation to the Blue Mountains and Penrith is high due to their appeal as adventure, recreation and cultural heritage destinations, as well as their proximity to Sydney which means an overnight stay is often not required.
- Domestic overnight visitation is high potentially due to the LGA being viewed as providing a weekend escape, especially for Sydneysiders.

Figure 19: Visitor Types for Comparative LGAs, 2012-2015 (Four-Year Average)⁵⁴



⁵⁴ Based on a special data request from DNSW. Data reflects September YE periods. International day trip visitors have been added to the Blue Mountains.

3.10. The Visitor Information Centres

3.10.1. Overview

The Blue Mountains currently has two yellow “I” accredited visitor information centres (VICs) - one located in Glenbrook and the other is at Echo Point (Figure 20). The VICs perform an important role in helping to direct visitor flows and to disperse visitation.

Figure 20: Location of the VICs



3.10.2. Visitation

Figure 21 provides a summary of visitation to the VICs over the last five years. It demonstrates the following.

- Visitation to Echo Point VIC has continued to grow, achieving average year on year growth of 9% (or an average increase of 41k visitors per annum). Total growth over the five-year period assessed is just over 165k visitors (an increase of 38%).
- Visitation to Glenbrook VIC has declined, falling - on average - by 1.3k visitors per annum. From 2012 – 2016, visitation to the VIC fell by just over 5k visitors.
- In terms of total visitation to the LGA (approximately 3.07m), Echo Point VIC captures an estimated 20% of visitors, whilst Glenbrook captures just under 4% of visitors.

Australia wide, there has been a decline in VIC use as visitors increasingly use technology prior to and while visiting a destination. The exception to this, however, is where VICs are positioned near major landmarks (such as the Three Sisters).

The Echo Point VIC is one of the rare VICs which operates at a true commercial profit. This is attributed to the large volume of tour buses and particularly those with Asian visitors who often purchase souvenirs. Additionally, many of these tour buses have tight schedules and only make limited stops in the Blue Mountains, with Echo Point being one of them. Visitors, therefore, tend to have limited time or opportunity to shop for souvenirs etc. elsewhere.

Figure 21: Visitation to the VICs⁵⁵

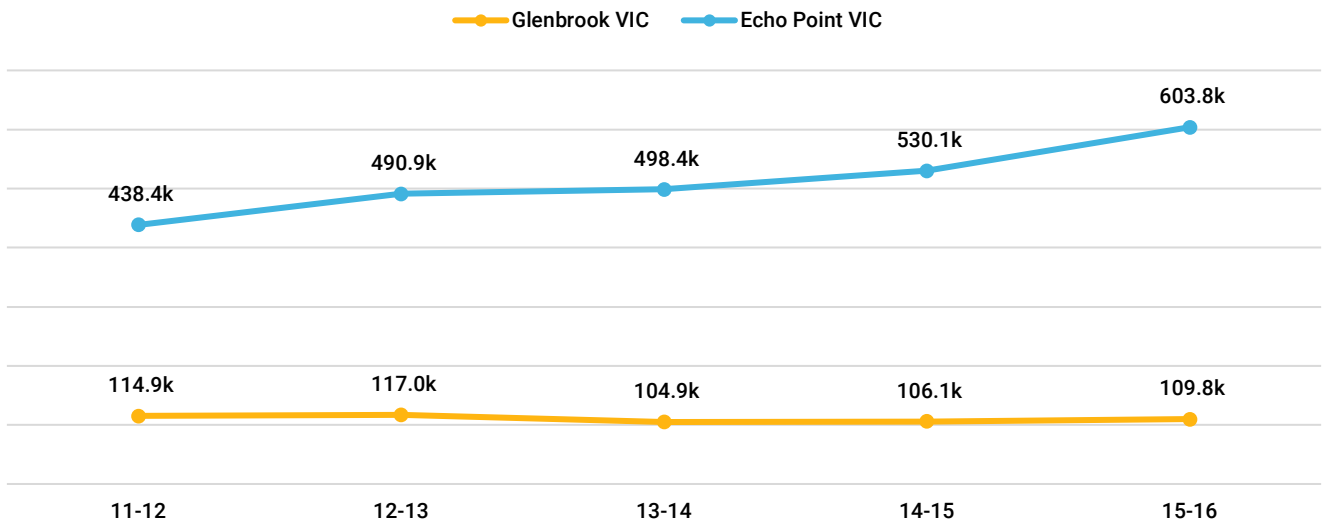
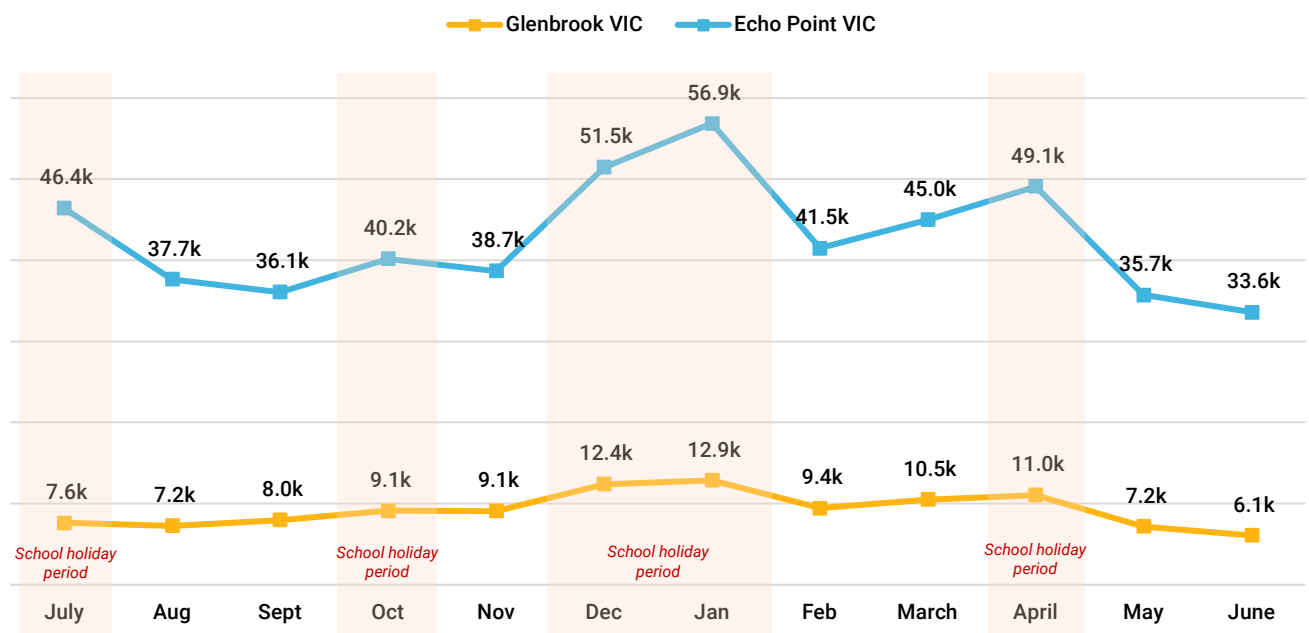


Figure 22 provides a summary of visitation to both VICs broken down on a monthly basis (averaged over the five-year period 2012 FY – 2016 FY). It demonstrates that peak visitor periods align with school holiday periods and, particularly, the Christmas and New Year period.

Figure 22: Monthly VIC Visitation (5 Year Average)⁵⁶



⁵⁵ Data provided by BMCC

⁵⁶ Data provided by BMCC

3.10.3. VIC Financials

The following table provides a summary of the financial performance⁵⁷ of both VICs. Echo Point's VIC has continued to generate strong profits, particularly over the last three years, where it has generated returns to potentially cover the operations loss generated from the Glenbrook VIC. The importance of this positive net result should not be understated, given that it is one of the very few VICs which produces a positive net financial result.

Table 7: VIC Financials

	2011/12	2012/13	2013/14	2014/15	2015/16
Echo Point VIC					
Income	\$1,058,708	\$1,217,415	\$1,279,214	\$1,440,691	\$1,890,575
Expenditure	\$1,038,974	\$1,191,260	\$1,126,326	\$1,212,507	\$1,545,958
Net Result	\$19,734	\$26,155	\$152,888	\$228,184	\$344,617
Glenbrook VIC					
Income	\$200,547	\$216,583	\$235,949	\$234,995	\$269,231
Expenditure	\$376,137	\$388,014	\$379,413	\$388,798	\$407,372
Net Result	-\$175,590	-\$171,431	-\$143,464	-\$153,803	-\$138,141

Assessing the VICs' financial performance on a per visitor basis provides a useful measure of the cost of providing visitor information services (Table 8). For every visitor into the Glenbrook VIC, it costs Council \$1.26 to provide information services (based on 2016 data). Comparatively, for Echo Point, the VIC generates \$0.57 in net revenue, on average, per visitor.

The two VICs are able to operate on a cost neutral basis through their provision of visitor and community services. This also provides a platform for considering ways to grow visitor services cost effectively. Additional visitor information needs might be met in Katoomba or at the railway station.

Table 8: Financials Per Visitor

	2011/12	2012/13	2013/14	2014/15	2015/16
Echo Point VIC					
Visitation	438,431	490,925	498,423	530,093	603,848
Income Per Visitor	\$2.41	\$2.48	\$2.57	\$2.72	\$3.13
Expenditure Per Visitor	\$2.37	\$2.43	\$2.26	\$2.29	\$2.56
Net Result Per Visitor	\$0.05	\$0.05	\$0.31	\$0.43	\$0.57
Glenbrook VIC					
Visitation	114,941	116,975	104,874	106,062	109,762
Income Per Visitor	\$1.74	\$1.85	\$2.25	\$2.22	\$2.45
Expenditure Per Visitor	\$3.27	\$3.32	\$3.62	\$3.67	\$3.71
Net Result Per Visitor	-\$1.53	-\$1.47	-\$1.37	-\$1.45	-\$1.26

⁵⁷ Asset and Cap Income lines have been excluded from the assessment. Income, Employment Costs and Operating Costs have been included.

3.11. SWOT Analysis

Table 9 sets out a SWOT analysis on the visitor economy. It is focused on tourism, visitor services and associated retail offerings.

Table 9: SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Part of the Greater Blue Mountains Area (a WHS) Brand awareness in domestic and international markets The NPWS and Council managed reserves, protected areas and walking tracks including Echo Point – Three Sisters precinct The heritage-built environment (buildings and trails) Size of the coach day tour market Proximity to Sydney Good transport infrastructure via the public rail system Cultural heritage assets such as art galleries and the BMCC Council's desire to strengthen the visitor economy The passion and commitment of local tourism businesses Ongoing investment into the accommodation and major attractions sectors Investment into VICs and their upgrading Leura's cherry blossoms - popular with the Asian market Sporting and cultural-based events Government investment in upgrades to the Great Western Highway Council's success in achieving State/Federal grants for tourism-related projects 	<ul style="list-style-type: none"> Constrained urban footprint for development Most tourism operators are micro or small operators and undercapitalised - a need for industry training Perception as a day visitor market experience, particularly among international visitors Lack of internationally branded accommodation options Ageing population resulting in increasing strain on health and social services Traffic and noise in some precincts during peak periods Shorter trading hours (particularly in restaurants), which does not support the perception as an overnight destination Lineal shape of the region, with most attractions clustered around the Great Western Highway Nature of hiking terrain requires a reasonable level of fitness due to steep descents and subsequent climbs Locals not always eager to support tourism due to perception of traffic and noise generated and lack of awareness regarding tourism's contribution to the economy Nature of heritage buildings means renovation costs are high Limited investment by State and Federal Governments Lack of commercial accommodation room capacity Lack of evening activities which makes the conversion of the day tripper market into an overnight market difficult 	<ul style="list-style-type: none"> Develop a tourism precinct to cluster the development of new medium – larger scale tourism attractions and facilities. Introduce new technology to help market more effectively via digital platforms etc. Introduce an internationally branded (4-star+) accommodation property to encourage overnight visitation Develop a conference facility to cater for large events and conventions (650 – 850 people) as well as an adjoining outdoor amphitheatre for outdoor events Develop eco-friendly chalets near Govetts Leap to provide a unique onsite experience Introduce a Blue Mountains "Great Walk" Develop a major recreational attraction (zip line, treetop walkway, BMX bike track, outdoor adventure playground) Introduce an evening experiences for locals and visitors Develop and market the Grand Cliff Top Walk Improve local and visitor infrastructure at Wentworth Falls Lake (pop-up café, floating pontoons etc.) Develop a trails hub at Knapsack Reserve including pop-up café, bike service centre, meeting room etc. Introduce bike hire stations and trails Develop a cantilevered viewing platform at Govetts Leap Upgrade the Blue Mountains Heritage Centre Expand the Culturescape Event Improve the Katoomba streetscape Develop the Blackheath Town Square 	<ul style="list-style-type: none"> New technology replacing demand for certain experiences and making some product out-dated Megatrends supporting growth in outbound leisure travel and wanting new destinations Community resistance to new tourism product and enhancements Perceived/actual carrying capacity constraints in some locations Lack of improved public transport capacity Significant bush fire risks Inability to introduce improved parking and supporting infrastructure Freedom and illegal camping placing pressure on Council and the NPWS to maintain facilities and upgrades Unlicensed tour operators Constrained environment limits development opportunities Effect of 'negative media' having long lasting impacts on tourist economy after natural disasters e.g. bushfires or storms.



STRENGTHS

WEAKNESSES

- Size of event calendar is large and needs to be consolidated to focus on those events which generate a wide range of benefits
- Limited signature events
- Age of trail maintenance
- Mt Wilson, Leura and Katoomba, in particular, have cultural components which attract visitors and both are at/nearing capacity during peak periods
- Limited pay-for experiences which makes maintenance and upkeep of amenities and tracks difficult
- Lack of experiences for the under 10s market such as high ropes and aerial courses, mazes and indoor fun parks
- No signature overnight trek experience which is based entirely within the BMNP
- Lack of uniform branding for the Blue Mountains LGA
- Limited digital presence
- Lack of product packaging such as accommodation, transport, guided walks/cycling, food and beverages etc.
- No accommodation within the BMNP such as glamping and eco-chalets to cater for the overnight trekking market
- Land use conflicts
- Lack of future-proofing for tourism
- The planning process for development applications appears to be taking too long due to State Government requirements.

OPPORTUNITIES

- Develop a Blue Mountains destination brand
- Improve visitor information at Katoomba Station
- Develop a Blue Mountains destination website including an events calendar
- Promote the RSA with Penrith and Hawkesbury
- Review 2010 Tourism Signage strategy, including a specific focus on attractions/facilities such as the BMCC and the Katoomba Station etc.
- Introduce UNESCO World Heritage entry signage in lower Blue Mountains
- Advocate for 8 car carriage services on weekends and public holidays
- Develop a coach layover hub to support Leura and Katoomba
- Introduce a coach drop off point at Leura
- Introduce a mustering area for large groups with seating
- Improve Wentworth Falls parking with park and ride offsite
- Upgrade Leura Cascades
- Develop Katoomba Falls night walk and light show experience
- Improve Katoomba and Leura parking with park and ride offsite

THREATS



4. PRODUCT AUDIT

4.1. Accommodation Audit⁵⁸

4.1.1. Blue Mountains LGA Accommodation

Table 10 provides a summary of the Blue Mountains accommodation audit.

- There are 1,861 rooms, 83 caravan park sites and 76 camping sites⁵⁹.
- The most common form of accommodation is motels, comprising 16% of all accommodation. This is followed by guest houses (14%).
- While motels are the most common form of accommodation, hotels comprise the largest room stock, accounting for 38% of available rooms (710 rooms). Motels have the next largest number of rooms (25% or 473 rooms).
- Cottages record the highest average rate for a standard room at \$354. B&Bs rank second, with an average room rate of \$194.

Table 10: Accommodation Audit Summary⁶⁰

Type	# Properties	% Properties	# Rooms	% Rooms	# Caravan Sites	% Caravan Sites	% Camping Sites	# Camping Sites	Avg. Rates \$ (Standard Room)
B&B	16	13%	90	5%	-	-	-	-	\$194
Backpackers	5	4%	123	7%	-	-	-	-	\$68
Cabins	5	4%	56	3%	-	-	-	-	\$183
Cottage	30	25%	44	2%	-	-	-	-	\$354
Guest House	17	14%	133	7%	-	-	-	-	\$121
Hotel	16	13%	710	38%	-	-	-	-	\$189
Motel	19	16%	473	25%	-	-	-	-	\$111
Serviced Apartments	5	4%	85	5%	-	-	-	-	\$164
Caravan Park/School Camp ⁶¹	6	5%	147	8%	83	100%	100%	76	-
Total	119	100%	1,861	100%	83	100%	100%	76	\$169

⁵⁸ The full findings of the product audit are contained in Section 4 of the Supporting Documentation.

⁵⁹ The total for camping sites only reflects those within commercial caravan/tourist parks.

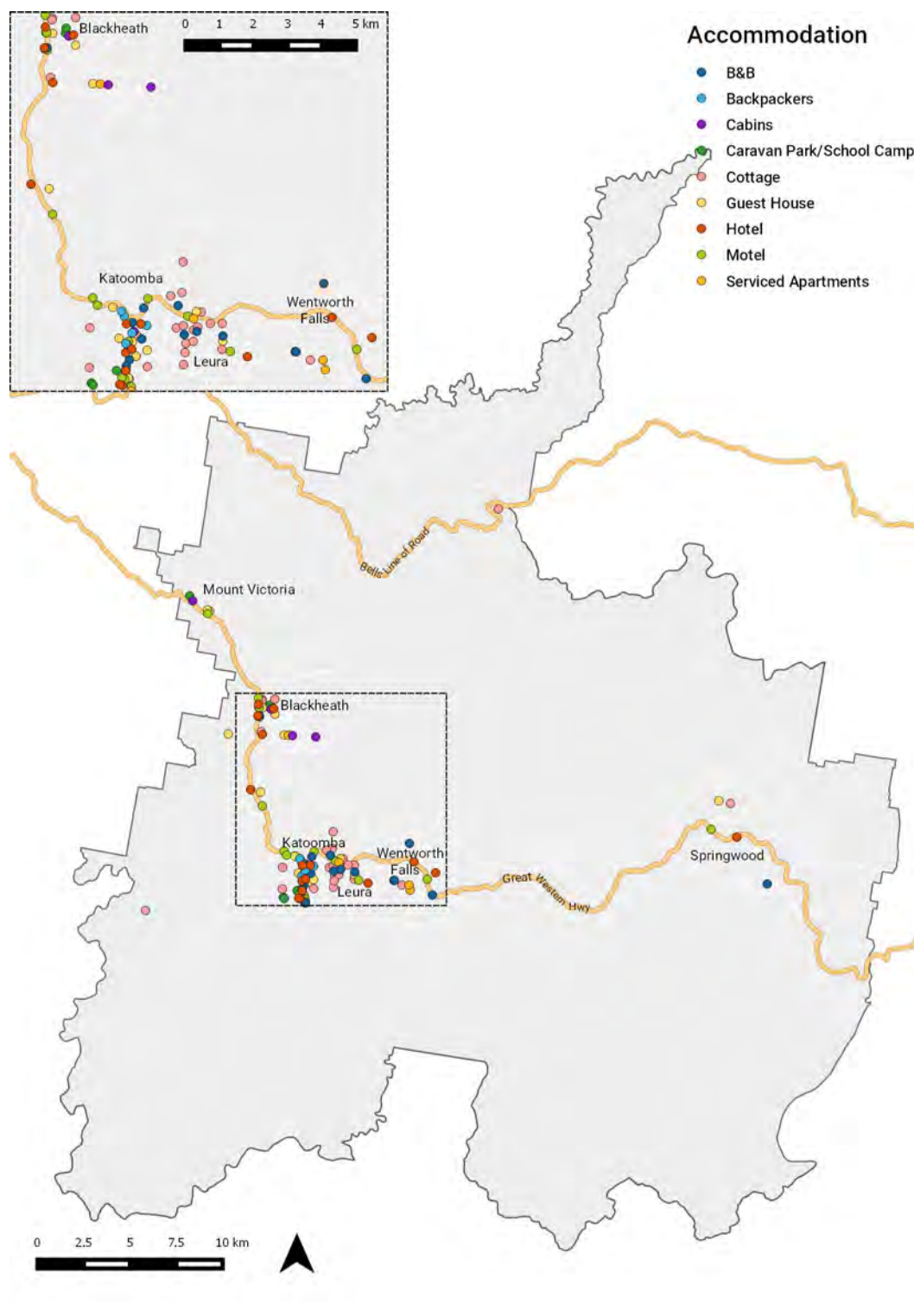
⁶⁰ The product audit was a desktop research exercise using Hotels.com, Expedia.com and TripAdvisor. If operators have not listed themselves on these websites, they may not appear in this list.

⁶¹ Note free/NPWS camping is not included in this product audit.

Figure 23 maps⁶² the accommodation audit findings. Most accommodation is clustered in the upper mountains near Katoomba, Blackheath, Leura and Wentworth Falls. There is comparatively little accommodation in the lower mountains.

While most properties in Mount Victoria are located along the Great Western Highway, most commercial accommodation in Katoomba is located south of the Highway in more suburban streets, especially along Katoomba and Lurline Streets.

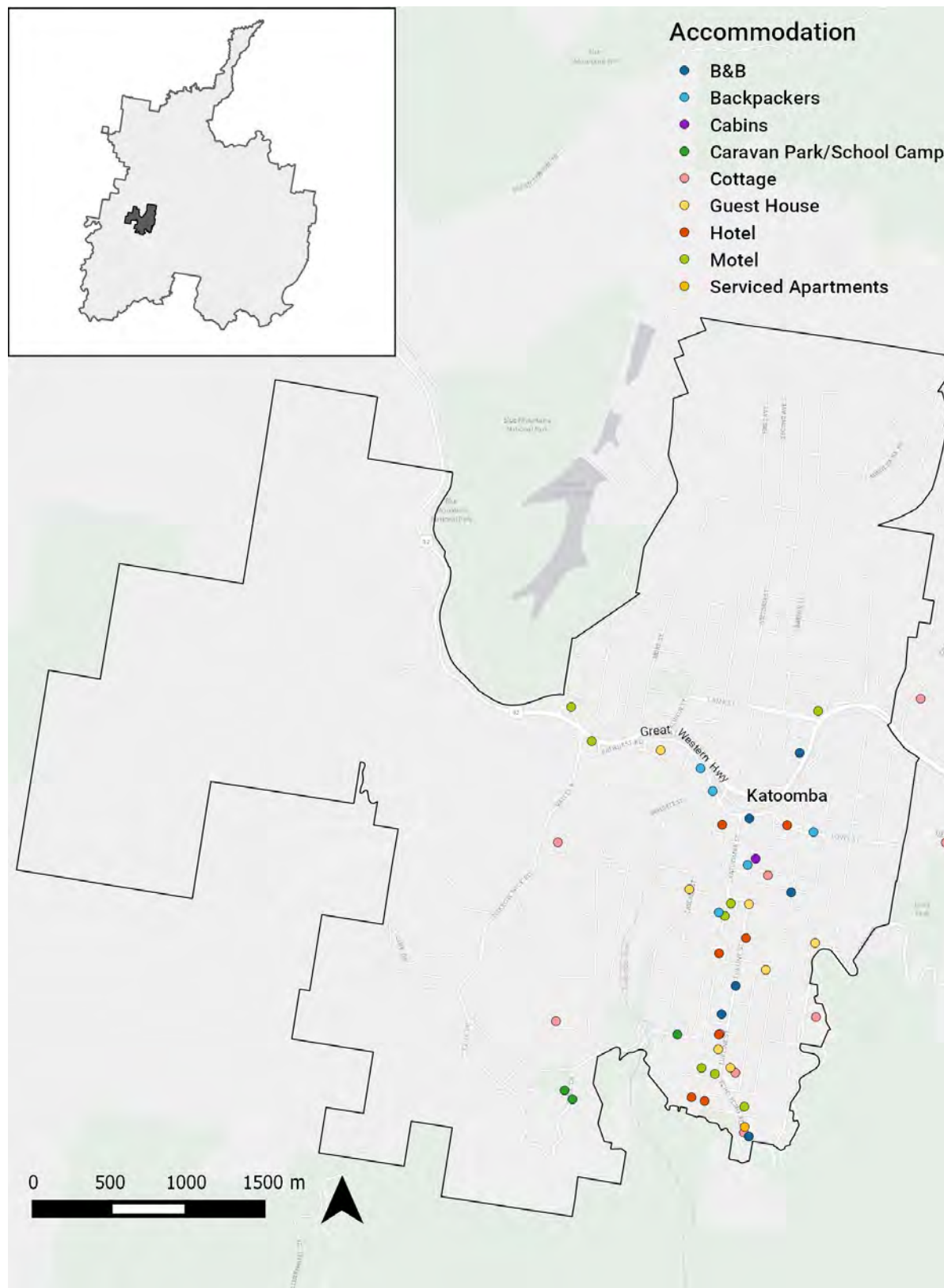
Figure 23: Accommodation Audit for Blue Mountains LGA



⁶² Mapping data in this section is based on data from ABS, Google and © OpenStreetMap & Contributors, and the GIS user community

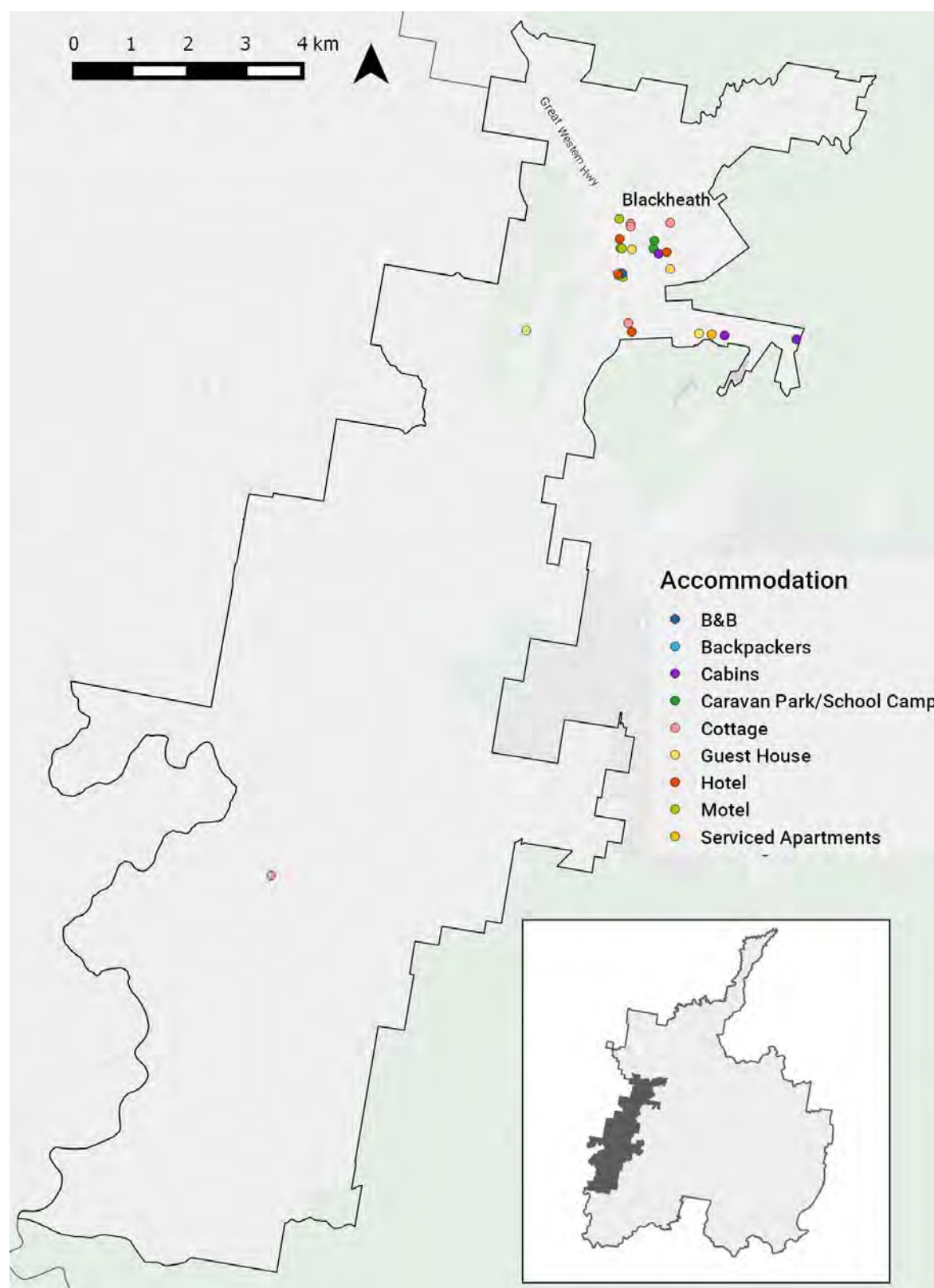
Figure 24 shows an expanded view of the Katoomba cluster of accommodation. There are **44** properties in total, 8 of which are motels and 7 hotels. The majority of these properties are situated within close proximity to Echo Point - along Katoomba Street, Lurline Street and Echo Point Road. This area, by default, reflects a well-defined tourism-focused accommodation precinct.

Figure 24: Accommodation in Katoomba



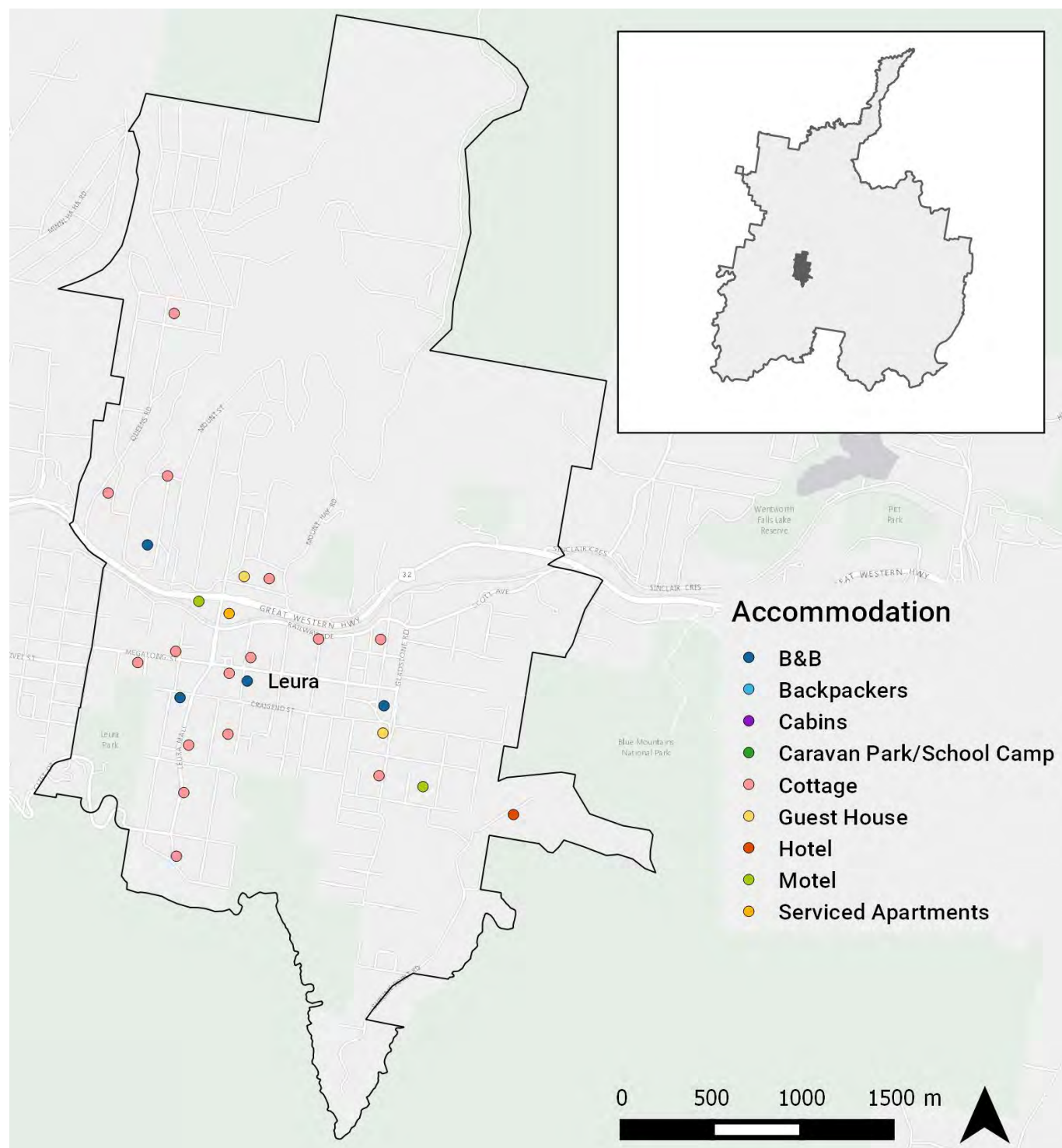
The equal second largest clusters of commercial accommodation are in Blackheath (Figure 25) and Leura (Figure 26). There are 25 commercial accommodation properties in both of these villages. In Blackheath, cottages and motels are the most common property types (accounting for 20% each). The majority of the hotel and motel properties are located along the Great Western Highway.

Figure 25: Accommodation in Blackheath



There are 25 accommodation properties located in Leura, with cottages being the most common type (60%). These are well spread out with no clearly defined precinct or cluster.

Figure 26: Accommodation in Leura



The third largest area of commercial accommodation is Wentworth Falls (Figure 27). There are 10 commercial accommodation properties, with B&Bs being the most common accommodation type (40%). In similar fashion to Leura, these properties are spread out and not clustered together.

Figure 27: Accommodation in Wentworth Falls

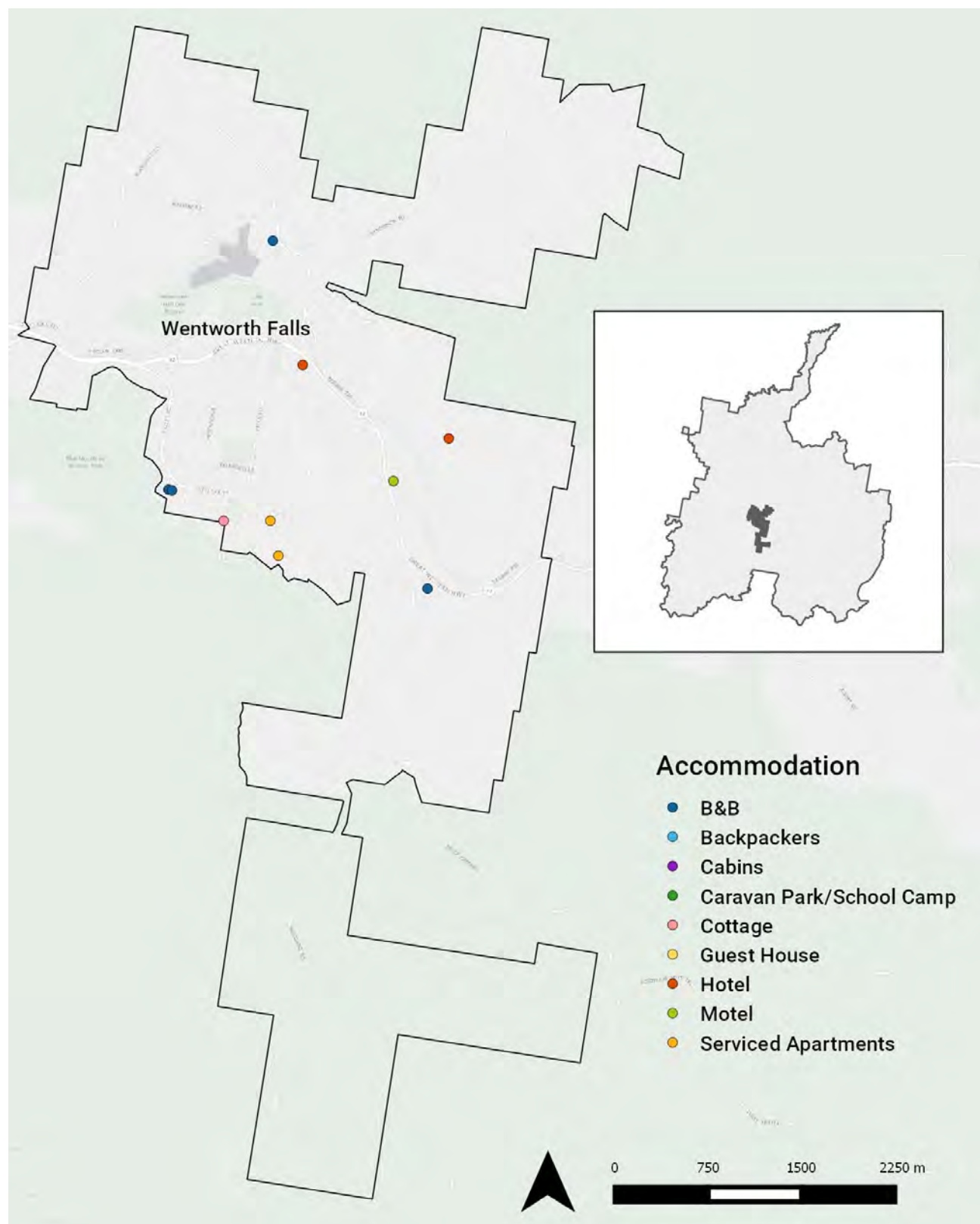
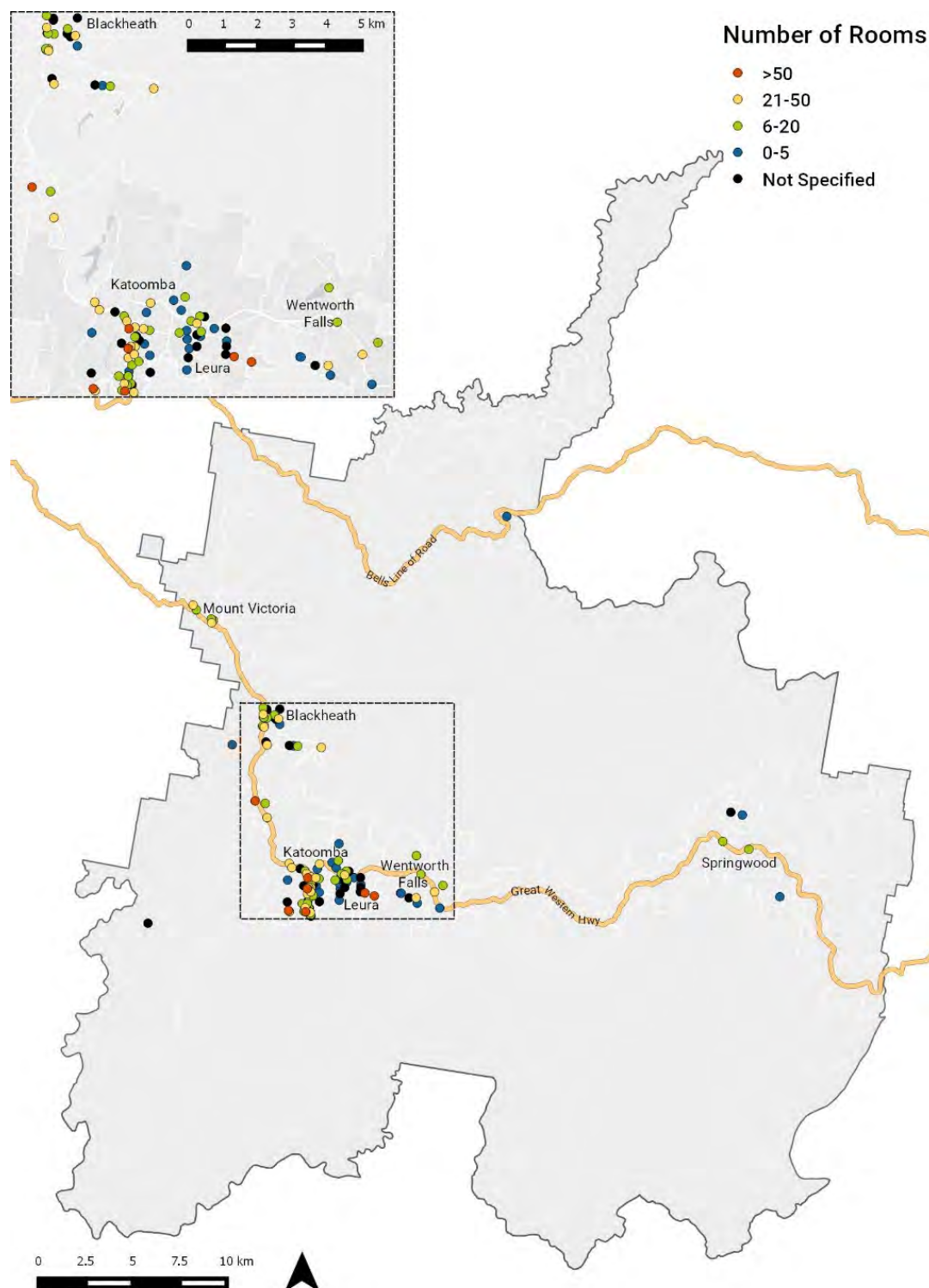


Figure 28 shows the number of commercial accommodation rooms available in the Blue Mountains. Most properties have from 6 - 20 available rooms (29%), followed by 5 or fewer rooms (22%) and 21-50 rooms (21%). Only 7 properties (6%) have more than 50 rooms available and most of these large properties are located in Katoomba or Leura⁶³.

Figure 28: Blue Mountains LGA Accommodation by Number of Rooms



⁶³ The remaining percentage of room numbers were not specified on websites such as Hotels.com, Expedia and TripAdvisor.

Tourism activity in the LGA will likely need to be clustered around areas which offer accommodation facilities and supporting food and beverage outlets and attractions. The area from Wentworth Falls to Blackheath is the predominant tourism node. How tourism development and associated growth is treated in this more concentrated tourism node is likely to need to differ from what might be expected or encouraged in most other parts of the LGA, at least for the next 10-year period. This importantly also provides greater certainty for local communities including those looking to reside in the LGA, to highlight where tourism activity is likely to be clustered. This has implications for parking facilities, pedestrian activity, noise, potential event activity, evening activations and the likely concentration of visitors into local cafés and retail outlets, especially over weekend periods when demand is strongest.

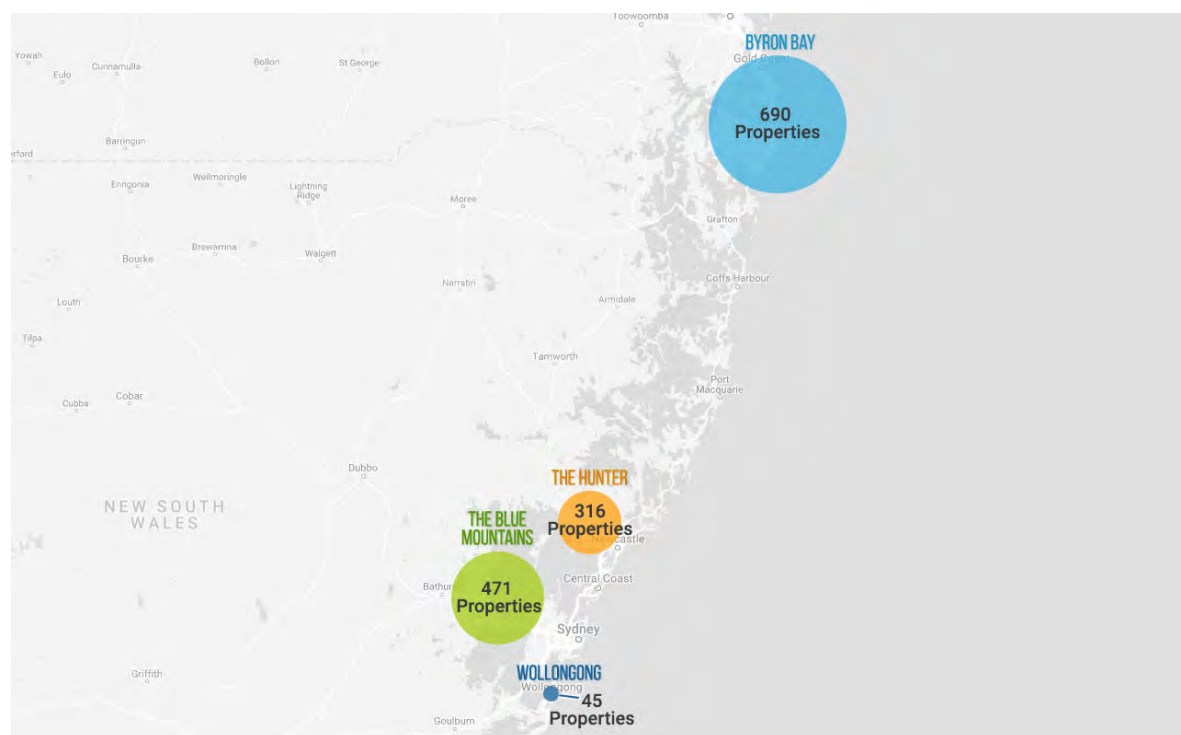
4.2. Private Accommodation Listings

There is a significant number of private properties in the LGA which are rented out (via Stayz.com, Airbnb.com and other/private websites).

While The Group attempted to identify the number of Airbnb properties within these destinations, the Airbnb website only ever displays a maximum of 306 properties per location. For all destinations queried⁶⁴ aside from Wollongong, Airbnb listed the maximum of 306 properties (Wollongong lists only 267 properties). Feedback from Blue Mountains' accommodation operators indicated that there were in excess of 800 Airbnb properties in the LGA.

On Stayz.com.au (another major holiday rental website), 471 rental properties were displayed for the Blue Mountains. The Hunter Valley listed 316 properties and Wollongong listed 45 properties. Only the Byron Bay area had more holiday rentals listed (690). Figure 29 compares the number of properties listed on Stayz.com.au in the Blue Mountains LGA, Hunter Valley, Wollongong and Byron Bay.

Figure 29: Properties listed on Stayz.com.au in Selected Destinations⁶⁵



⁶⁴ Including the Blue Mountains, The Hunter and Byron Bay

⁶⁵ Stayz do not recognise LGA boundaries. The Group has tried to calculate based on the LGA for the Blue Mountains, however there may be some properties which have been included or excluded. The Blue Mountains LGA

Though not a regional destination⁶⁶, Waverley LGA (which contains Bondi Beach) has an estimated 3.5k Airbnbs, representing 1/11 residences, though many of these are only let over the Christmas-January summer period. The implication, however, is that councils need to be considering how they are going to monitor and, potentially, register Airbnbs before they lead to issues affecting neighbouring residents.

The comparatively high number of Airbnb-style property listings in the Blue Mountains poses challenges for commercial accommodation providers. Airbnb operators, for example, are not always bound by the need for accreditation, insurance and certification. Those who provide food are considered particularly problematic with licensed B&Bs having to adhere to and pay for kitchen inspections etc. which increases costs for the consumer and makes them potentially uncompetitive.

4.3. Attraction Audit

Table 11 provides a supply side audit of tourism product in the LGA. The audit identified 127 tourism attraction related experiences, including free and pay for attractions. The product audit captures those operators who are listed on the BMATA and VisitNSW.com websites and rank highly in Google searches. There may be some operators who do not have a web presence and are, therefore, not captured.⁶⁷

Based on this audit, Blue Mountains tourism is primarily distributed amongst:

- self-guided bushwalking product: 46% of the product identified⁶⁸;
- art and culture: 15% of total product;
- day spas: 9% of the total product; and
- adventure tour companies: 7% of the total product.

Table 11: Attraction Types Offered in Blue Mountains LGA

Product Type	Total	% Split
Bushwalk (Self-Guided)	59	46%
Art & Culture	19	15%
Day Spa	11	9%
Adventure Tour Company	9	7%
Mountain Biking (Self-Guided)	7	6%
Recreation ⁶⁹	7	6%
Gardens/Garden Tours	6	5%
F&B Experience	4	3%
Health & Fitness	2	2%
Mountain Biking Tour Company	1	1%
Heritage	1	1%
Mountain Biking Rental Company	1	1%
Total	127	100%

⁶⁶ Waverley LGA is a coastal destination with a similar sized population but far less over 50s. It is also much closer to the Sydney CBD and has a higher socio-economic profile.

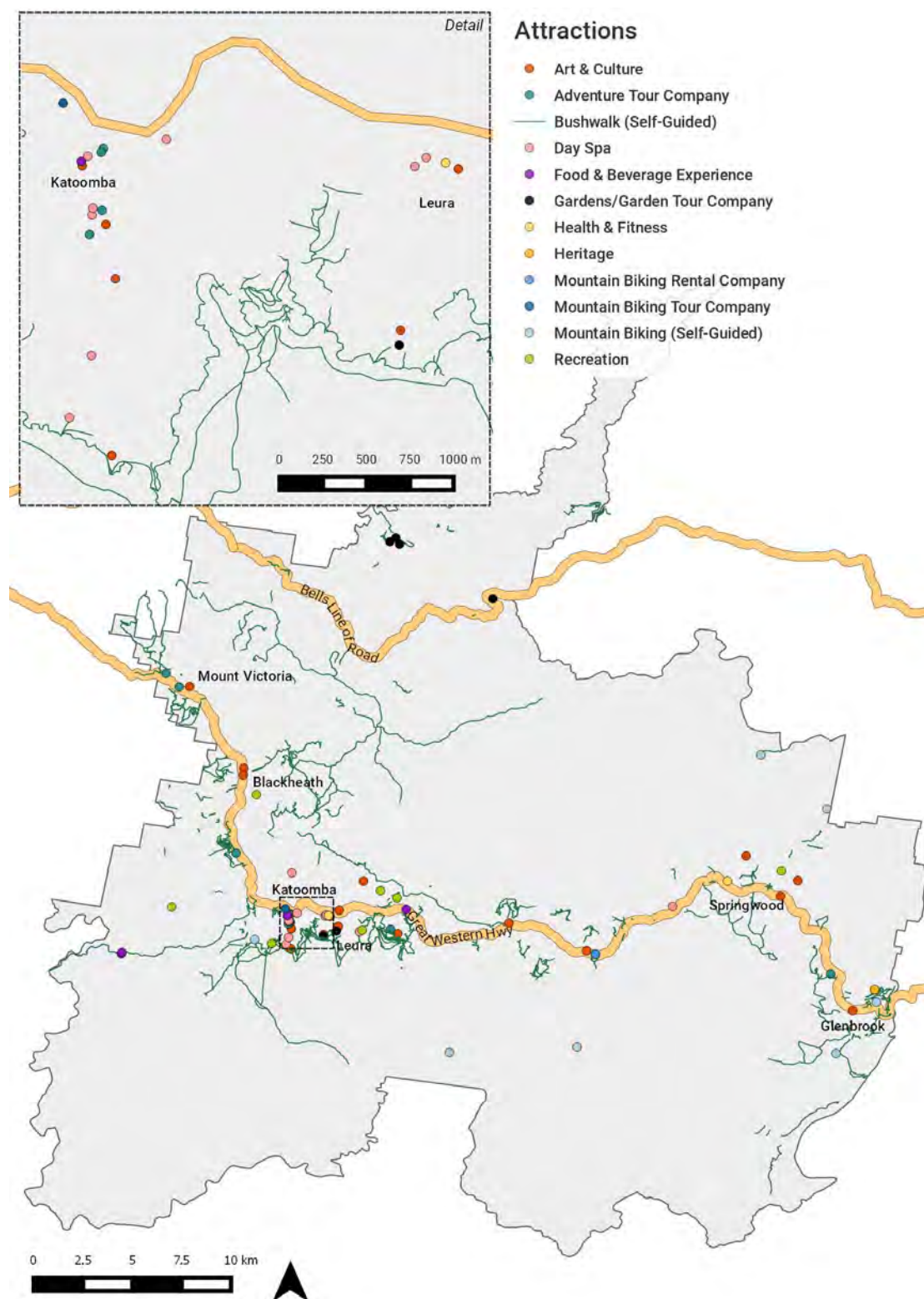
⁶⁷ Note: Specialty shops were not included as part of this audit.

⁶⁸ Self-Guided bushwalk tracks were derived from the following website: <http://www.bluemts.com.au/info/thingstodo/bushwalks>. Where there were longer versions/variations of tracks, the subsequent tracks were not always included.

⁶⁹ Note: Bowling clubs and regular swimming pools were not included in the 'recreation' category.

Figure 30 maps the attraction audit. With the exception of bushwalking tracks⁷⁰ and mountain biking trails, most attractions are located within 3 km of the Great Western Highway or the Bells Line of Road, with two clusters evident in Katoomba and Leura.

Figure 30: Blue Mountains LGA Attractions Audit



⁷⁰ The bushwalking tracks in the map were provided by BMCC as GIS data.

4.4. Events Audit

Based on desktop research⁷¹ and the 2015 Calendar of events⁷², Table 12 provides an audit of the events. The audit identified 299 events. Community events were the most common event type (18.1% of all events). This was followed by exhibitions (15.7%) and concerts (9.0%).

Table 12: Event Types offered in the Blue Mountains

Event Type	Total	% Split
Art	8	2.7%
Bike Ride	3	1.0%
Car show	1	0.3%
Carols/Christmas	7	2.3%
Civic/Commemorative	18	6.0%
Community	54	18.1%
Concert	27	9.0%
Dinner Show	13	4.3%
Endurance	9	3.0%
Exhibition	47	15.7%
Film Screening	8	2.7%
Gardens	9	3.0%
Horse riding	1	0.3%
Kids	7	2.3%
Lunch	1	0.3%

Event Type	Total	% Split
Market	11	3.7%
Music	3	1.0%
Other	4	1.3%
Play/Theatre	3	1.0%
Regatta	1	0.3%
Show	1	0.3%
Sports	1	0.3%
Talk	18	6.0%
Trail	1	0.3%
Trivia Night	1	0.3%
Walk	8	2.7%
Workshop	33	11.0%
Wrestling	1	0.3%
Total	299	100.0%

Table 13 illustrates the major events (21 in total) in the LGA. Community events make up 57% of major events.

Table 13: Blue Mountains LGA Major Annual Events

Event	Venue	Month	W/end or MidWk	Type	Est. Visitor #	Est % Local	Est % Out of area	Listed on VisitNSW website	Listed on BMATA website	Major Event
Glenbrook Australia Day and Annual Gnome Convention	Glenbrook Park	Jan	MidWk	Community	6,000	-	-	Yes	-	-
Leura Shakespeare Festival	Everglades Historic House and Gardens	Jan	-	Community/ Arts	-	-	-	Yes	-	-
Lady Luck	Carrington Pl Katoomba	Jan	W/end	Community	750	-	-	Yes	Yes	Yes
Summer Harvest Festival	Blue Mountains Region	Jan	Both	Community	-	-	-	-	-	-
Blue Mountains Ukulele Festival	Katoomba Civic Centre, Carrington Pl & Hotel	Feb	w/end	Music	4,000	-	-	No	Yes	Yes
The Roaring 20s & All that Jazz Festival	Various venues	Feb	Both	Community	-	-	-	No	Yes	Yes
Blue Mountains Music Festival	Katoomba RSL, Pub	Mar	w/end	Music	4,000	-	-	Yes	Yes	Yes

⁷¹ visitbluemountains.com.au; visitnsw.com

⁷² Provided by Council. The Group also added to this event calendar based on desktop research.



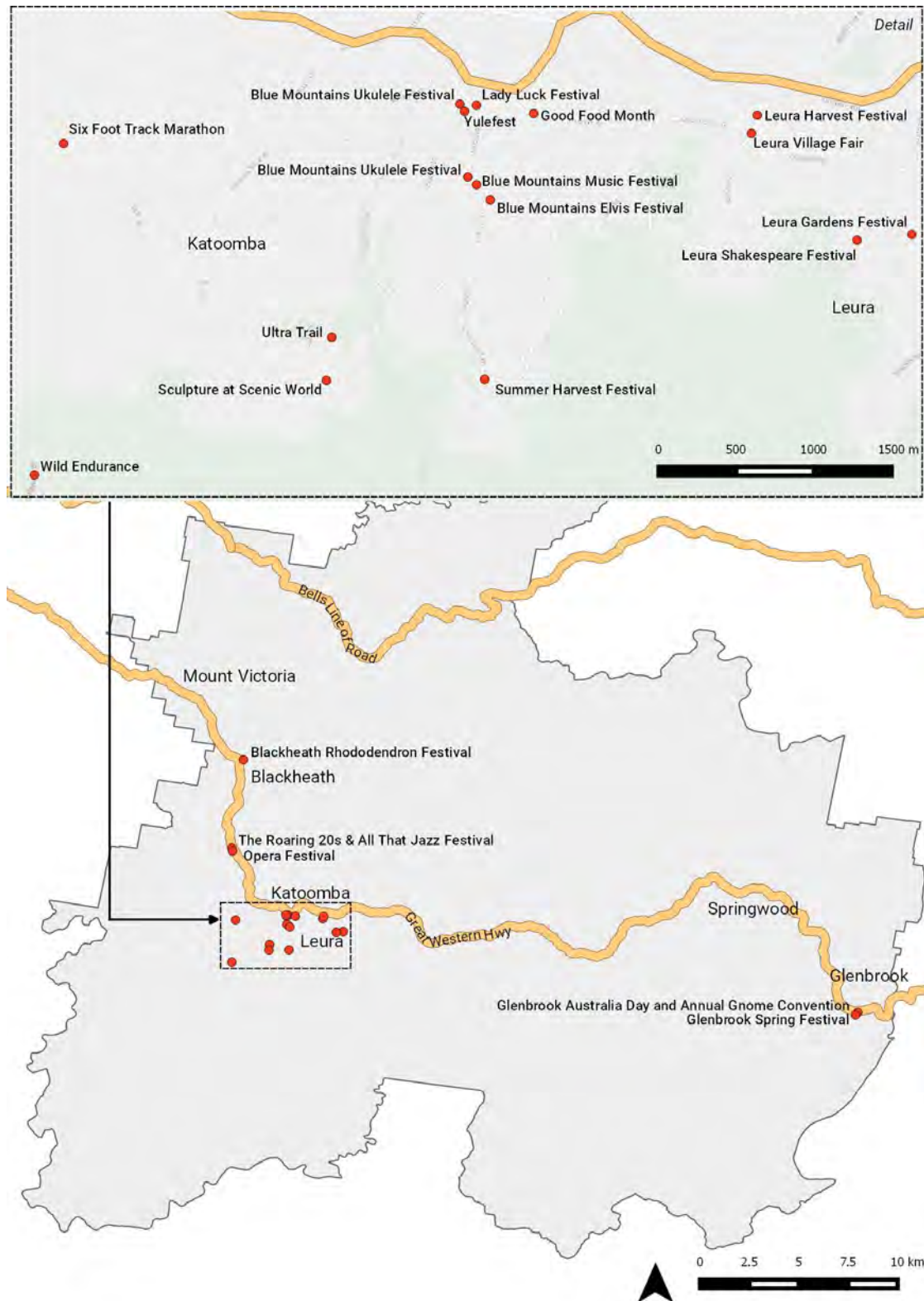
Event	Venue	Month	W/end or MidWk	Type	Est. Visitor #	Est % Local	Est % Out of area	Listed on VisitNSW website	Listed on BMATA website	Major Event
	School, Clarendon									
Six Foot Track Marathon	Explorers Tree to J Caves	Mar	w/end	Endurance	1,150	-	-	Yes	No	Yes
Sculpture at Scenic World	Scenic World	April	Both	Exhibition	-	-	-	No	Yes	Yes
Leura Harvest	Leura Mall, Leura	May	w/end	Community	1,500	-	-	No	Yes	Yes
North Face 100 (Now Ultra Trail Australia)	starts at Scenic World	May	w/end	Endurance	6,000	40%	60%	Yes	Yes	Yes
Wild Endurance	Dunphy's Camp, Megalong Valley	May	w/end	Endurance	-	-	-	Yes	No	Yes
Winter Magic Festival	Katoomba Street	Jun	w/end	Community	40,000	50%	50%	Yes	Yes	Yes
Yulefest	Various locations in BM	Jun - Aug	-	Community	-	-	-	Yes	Yes	Yes
Blue Mountains Elvis Festival	Katoomba RSL Club	Aug	w/end	Concert	-	-	-	No	Yes	Yes
Good Food Month	Various	Oct	Both	Community	-	-	-	No	Yes	Yes
Leura Gardens Festival	Leura	Oct	Both	Gardens	-	-	-	Yes	Yes	Yes
Leura Village Fair	Leura Mall, Leura	Oct	w/end	Community	5,000	40%	60%	Yes	No	Yes
Blackheath Rhododendron Festival	Blackheath	Nov	w/end	Community	2,000	60%	40%	Yes	Yes	Yes
Glenbrook Spring Festival	Glenbrook Village/Park	Nov	w/end	Community	3000	50%	50%	Yes	-	-
Opera Festival	Hydro Majestic	-	-	Concert	-	-	-	-	-	-

Figure 31 maps the major events offered in the LGA. The largest cluster of major events is in Katoomba. In 2015, The Carrington Hotel was host to three separate major events including Yulefest, the Lady Luck Festival and the Blue Mountains Ukulele Festival.

The locations of most major events are from Wentworth Falls to Blackheath but with a major concentration around Katoomba and Leura. Trying to spread major events into other parts of the LGA is challenging without addressing infrastructure requirements, food, beverage and hospitality offerings, and the need to consider potential community and related social issues which some events may generate with congestion and noise etc.

Concentrating event activity into defined areas, precincts and nodes, supports the ability to leverage off existing infrastructure.

Figure 31: Blue Mountains LGA Major Events





5. COMPARATIVE ANALYSIS

5.1. Natural World Heritage Sites in Australia and New Zealand

Comparative analysis was undertaken to illustrate what other WHSs have undertaken to cope with visitor demand and to provide best practice examples. Australia is home to 16 natural WHSs. Figure 32 shows 14 of these sites as well as two of New Zealand's natural WHSs.⁷³

Figure 32: Australia and NZ Natural World Heritage Sites



⁷³ Heard and Macdonald Islands, Macquarie Island and New Zealand Sub-Antarctic Islands are not within the scope of this map



Table 14 details a selection of the Australian and New Zealand natural WHSs. These sites have been deliberately selected because of their landscapes, with a focus on mountainous and national park wilderness areas.

These sites have also been mapped in Figure 33 which follows.

Table 14: Selected Australian and NZ Competitor World Heritage Sites

Site	State(s)/Territory	Size	Distance from Nearest Major City	Unique Attractions
Greater Blue Mountains Area⁷⁴ 	NSW	1,032,649 ha	104km from Sydney to Echo Point	Three Sisters
Australian Fossil Mammal Sites (Riversleigh/Naracoorte) 	QLD/SA	10,300 ha	277 km from Mount Isa, 324 km from Adelaide	Fossils (Oligocene–Miocene and mid-Pleistocene–present)
Gondwana Rainforests of Australia 	NSW/QLD	370,000 ha	Multiple sites	Mt Warning, the Great Escarpment
Kakadu National Park 	NT	1,980,994 ha	152 km from Katherine	RAMSAR wetlands, cave paintings/rock carvings
Purnululu National Park 	WA	79,602 ha	805 km from Katherine	Bungle Bungle Ranges

⁷⁴ <http://whc.unesco.org/en/list/917>



Site	State(s)/Territory	Size	Distance from Nearest Major City	Unique Attractions
Tasmanian Wilderness 	TAS	1,584,233 ha	320 km from Hobart to Cradle Mountain	Cradle Mountain
Uluru-Kata Tjuta National Park 	NT	132,566 ha	465 km from Alice Springs	Uluru
Wet Tropics of Queensland 	QLD	893,453 ha	125 km from Cairns to Daintree	Daintree Rainforest
Te Wahipounamu – South West New Zealand 	NZ – South Island	2,600,000 ha	89 km from Christchurch to Franz Josef	Fiordland coastline, Franz Josef and Fox Glaciers
Tongariro National Park 	NZ – North Island	79,596 ha	225 km from Hamilton	Emerald Lakes

Figure 33: Selected Australian and New Zealand World Heritage Sites⁷⁵



⁷⁵ Map is based on data from ABS, Esri, HERE, DeLorme, © OpenStreetMap contributors, and the GIS user community.

5.1.1. Visitation

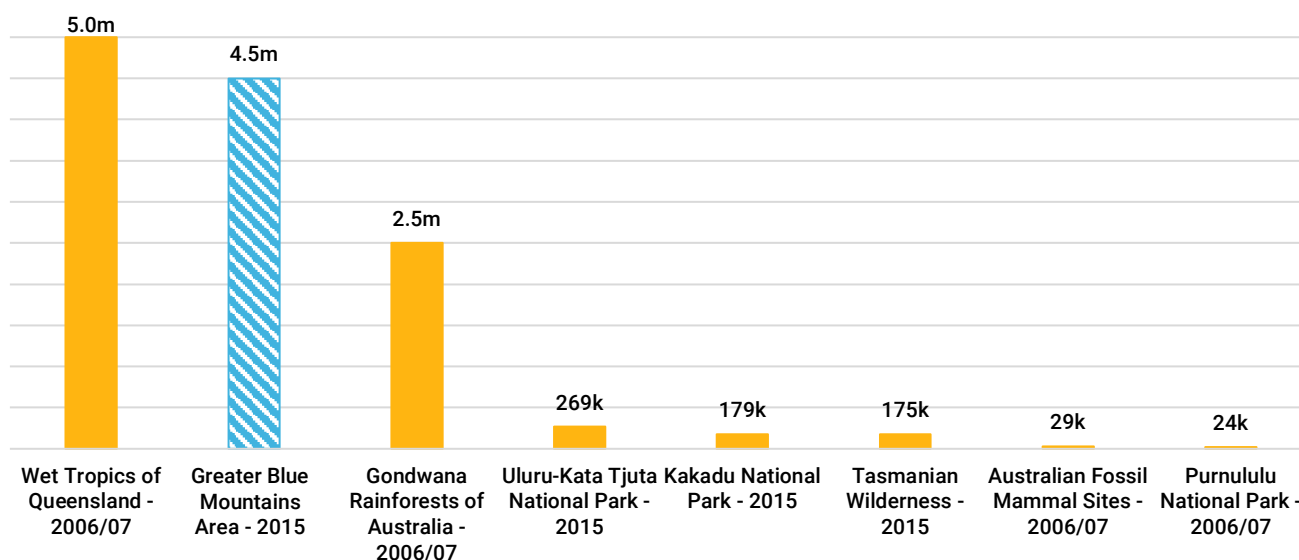
Figure 34 illustrates visitation to Australian WHSs⁷⁶ compared with visitation to the Greater Blue Mountains Area (GBMA). The Wet Tropics received the highest visitation likely because it has 14 separate sites and is accessible from Cairns and Townsville⁷⁷. The GBMA also has strong visitation as it is highly accessible from Sydney. Uluru-Kata Tjuta is a popular attraction for international visitors but its relative isolation from main cities may be attributable to it receiving comparatively fewer visitors.

Visitation to the GBMA reflects visitation to the previously defined Blue Mountains tourism region, which included the LGAs of the Blue Mountains, Lithgow and Oberon. As the GBMA crosses 12 LGA boundaries⁷⁸, actual visitation to the GBMA would be larger than shown in Figure 34 (data on visitation to the entire GBMA is not currently available). As the Blue Mountains LGA is considered the primary gateway to the GBMA, however, we consider this should be reflective of the bulk of visitation to the area.

What we find is that:

- access to a main city is a major determinant of visitation levels; and
- the clear point of difference/uniqueness for each site is a major determinant.

Figure 34: Visitation to Selected Australian World Heritage Sites⁷⁹



⁷⁶ Total visitation data for the New Zealand sites are unavailable

⁷⁷ 125km to Daintree from Cairns and 60km to Paluma Range from Townsville

⁷⁸ Including Blue Mountains, Upper Lachland Shire, Wollondilly, Oberon, Penrith, Lithgow, Hawkesbury, Cessnock, Singleton, Muswellbrook, Mid-Western Regional and Wingecarribee. Based on Shape files from the Australian Government Department of Sustainability.

⁷⁹ Special data request from Tourism NT; Tourism Region Profiles, 2015, Wilderness West Tasmania, Tourism Research Australia; Economic Activity of Australia's World Heritage Areas, 2008, Department of the Environment, Water, Heritage and the Arts; Travel to Blue Mountains, YE Dec 2015, DNSW. Visitation data ranges from 2006/07 to 2015. Note 960k visitors were added to the Blue Mountains figure to reflect international day trip visitors.



5.2. Global World Heritage Sites

Table 15 shows a selection of global best practice natural WHSs. These sites have been selected because they either have particularly high visitor numbers, have ranked well in surveys from popular magazines such as National Geographic, or have won TripAdvisor awards.

Table 15: Global Comparative World Heritage Sites





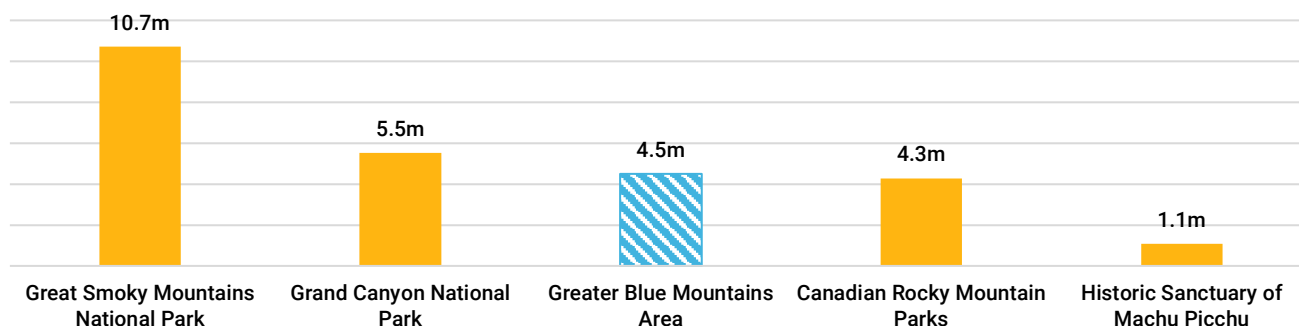
Site	Country	Area	Distance from Nearest Major City	Unique Attractions
Canadian Rocky Mountain Parks 	Canada	2,299,104 ha	108 km from Calgary	Banff and Jasper National Parks
Historic Sanctuary of Machu Picchu 	Peru	38,160 ha	90 km from Cusco	Inca ruins
Grand Canyon National Park 	United States	493,270 ha	406 km from Las Vegas	Grand Canyon
Great Smoky Mountains National Park 	United States	209,000 ha	52 km from Knoxville	Temperate flora

Figure 35 compares visitation to the international WHSs, with visitation to the GBMA. The Great Smoky Mountains is the most visited national park with over ten million visitors in 2015. It is easily accessible from Atlanta, Charlotte, Nashville and Louisville⁸⁰. Importantly, it is within a day's drive for 60% of America's population.⁸¹

Figure 35: Visitation to Comparative Natural World Heritage Sites⁸²



5.3. Australian and Global World Heritage Benchmarking⁸³

Element Benchmarked: Visitation

The global WHSs received over one million visitors per year as did the Wet Tropics of Queensland, the GBMA and the Gondwana Rainforests in Australia. The Great Smoky Mountains received the most visitors, recording 10.7m in 2015. This was followed by Grand Canyon National Park with 5.5m visitors. This is attributable to the United States' large visitor domestic market. Generally, the global sites which had higher visitation levels attracted a higher domestic market percentage.⁸⁴ Recent data was not available for Te Wahipounamu (NZ) or Tongariro National Park (NZ).

Element Benchmarked: Main Visitor Markets

The Grand Canyon and the Canadian Rockies attracted mostly domestic visitors, while Machu Picchu had 72% of international visitors. Regional visitation was analysed for four of the Australian sites (Uluru-Kata Tjuta, Kakadu, Tasmanian Wilderness and Purnululu) with all four having mostly domestic visitors. The GBMA had a slightly lower domestic percentage, receiving 76% domestic visitors and 24% international visitors.⁸⁵

⁸⁰ 3h 30min drive from Atlanta, 3h 30 min drive from Charlotte, 3h 35 min drive from Nashville and 4h 30 min drive Louisville without traffic (per Google Directions)

⁸¹ America's National Parks are More Popular Than Ever (and the Great Smoky Mountains National Park is #1), 2016, Jason Fishman

⁸² The data for Canadian Rocky Mountains Parks only includes the Alberta Canadian Rockies Tourism Region, and as such, visitation is expected to be higher.

Sources: National Park Service Visitor Use Statistics: Grand Canyon NP, 2016, National Park Service; National Park Service Visitor Use Statistics: Great Smoky Mountains NP, 2016, National Park Service; Travel to Blue Mountains, YE Dec 2015, DNSW; Tourism in Canadian Rockies Tourism Region: A Summary of 2012 Visitor Numbers and Characteristics, 2014, Alberta Government; Visitantes nacionales Y Extranjeros Al Parque Arqueologico de Machu Picchu, 1998-2014, Ministerio de Cultura; National parks visitor statistics. Visitation data ranges from 2012 – 2015. Note: 960k visitors were added to the Blue Mountains figure to reflect international day trip visitors.

⁸³ Please note, the full findings of a comparative analysis of global WHSs are contained in Section 5 of the Supporting Documentation.

⁸⁴ Note domestic/international markets are unavailable for the Great Smoky Mountains which receives the highest visitation, however, this is expected to be similar to the Grand Canyon, as the Great Smoky Mountains is a popular road trip destination for Americans.

⁸⁵ Data was not available for Te Wahipounamu, Tongariro or Great Smoky Mountains.



Element Benchmarked: Distance from Closest Main City

The most accessible site from a main city is the Great Smoky Mountains which is located 52km from Knoxville, followed by Te Wahipounamu (89km from Christchurch to Franz Josef). In Australia, the GBMA is the most accessible and is located 104km from Sydney. The most isolated site is Purnululu, which is 805km away from Katherine.

Element Benchmarked: Signature/Overnight Trails

- The Wet Tropics features the Wet Tropics Great Walk (Juwun and Jambal are 43.5km one way, 4-6 days. Camping is permitted and hotel and motel accommodation are available in some nearby towns).
- The recently developed Overland Track is offered by the newly created Three Capes Walk in Tasmania commencing at Port Arthur, Tasmania. This track has opened as a 3 night 4 day walk this year. This walk was originally planned as a 6-day walk but was reduced to 4 days because market research indicated that offering a 4-day walk was preferred by many.
- Kakadu has the Koolpin Gorge to Twin Falls hike (50km, 5 days) a guided tour by NT Immersions and Gecko Canoeing.
- The Walls of Jerusalem is a Tasmanian Wilderness highlight (30-40km, 4 days) offered as a guided tour by Tasmanian Expeditions starting from \$1295 per person. This is an introductory level walk.
- Purnululu National Park has the Piccaninny Gorge Walk (30km, 2-7 day walk). The overseas sites typically offer a wider range of overnight walks ranging from easy to difficult.
- Great Smoky Mountains has various trails to Mount LeConte (20km, overnight). The LeConte Lodge is located at the mountain's summit, offering private or share cabins, family meals and a lunch pack for the walk down.
- Grand Canyon has the Rim to Rim hike (38km and one can stay overnight at the Grand Canyon Lodge).
- The Skyline Trail is a signature trail in the Canadian Rockies (42km, 1-3days) offered as a guided tour by Great Canadian Trails, stay at backcountry lodge from AUD\$2611.
- The Inca Trail to Machu Picchu is 82km, 4 days (offered as a guided tour by SAS Travel, Llama Path, Peru Treks and Adventure, Enigma and United Mice).
- Te Wahipounama offers the Milford Track (53.5km one way, 4 days) as a guided tour by Ultimate Hikes.
- Tongariro has the Tongariro Alpine Crossing which can be typically hiked in a day, though there is also an overnight option, as well as the Tongariro Northern Circuit (38km, 2 nights). Tours start from \$950 with hut accommodation available.

There is no signature "Great Walk" within the BMNP. Some commercial operators such as Auswalk walk from Mount Victoria to Wentworth Falls (e.g. in their Grand Traverse package) but there is no continual trail through the BMNP and hikers need to leave the BMNP to reach any commercial accommodation.

Element Benchmarked: Accommodation

All sites have campsites except for Uluru-Kata Tjuta which does not allow camping or accommodation within the National Park. Accommodation within the WHSs ranged from simple bunks (Australian Mammal Fossil Sites), cottages (Gondwanan Rainforests, Kakadu), hotels (Kakadu) and wilderness lodges (Tasmanian Wilderness, Great Smoky Mountains, Grand Canyon), to 4-5-star accommodation (Canadian Rocky Mountains, Te Wahipounamu, Machu Picchu – with prices typically ranging from AUD\$735 - \$1,104 per night), glamping (Gondwanan Rainforests, Purnululu) and luxury lodge and spa (Wet Tropics). The Blue Mountains has no built accommodation within the BMNP, except for limited campgrounds.



Element Benchmarked: Entry Fees

Seven of the sites have free entry (GBMA, Wet Tropics, Gondwana Rainforests, Australian Fossil Mammal Sites, Great Smoky Mountains and Te Wahipounamu, Tongariro), while Purnululu National Park has free entry if entrance is on foot or bicycle, but there is a charge for vehicular access. The most expensive entrance fee is for Machu Picchu (AUD \$50.81 per adult),⁸⁶ followed by Kakadu National Park in the dry season (\$40 per adult). Parks such as Grand Canyon National Park also charge entry fees per car.

Element Benchmarked: Unique Experiences

- The Canadian Rockies and Te Wahipounamu offer the most diverse range of unique added experiences including gondola rides, zip lining, Rocky Mountaineer train luxury gold service, river rafting, glacier skywalk, Food Lovers Self-Drive Package (Canadian Rockies) and stand up paddle boarding, kayaking/canoeing, skydiving, glacier hot pools, boat and fishing tours (Te Wahipounamu).
- The Wet Tropics have white water rafting, elevated boardwalks, canopy walkways and the 23m Canopy Tower.
- Uluru-Kata Tjuta offers camel tours and a Field of Light dinner (light artwork after sunset until March 2017) located outside of the National Park.
- Tasmanian Wilderness offers an Overland Track Photo Tour where visitors can learn landscape photography on a hiking tour.
- Tongariro has scenic flights, horse riding and kayaking.
- The Grand Canon has the Skywalk (glass-bottom viewing platform) and river tours.
- The Blue Mountains has Scenic World, canyoning and abseiling tours.

Element Benchmarked: Issues & Challenges for the Tourism Sector

The most common issues across the sites are ageing infrastructure and associated safety issues, an undersupply of accommodation (particularly 3-5 star), overcrowding, limited parking and seasonality issues. For the Australian sites in particular:

- Uluru-Kata Tjuta has issues with tourists wanting to climb Uluru: this is at odds with Anangu cultural traditions;
- Kakadu offers only limited walk-based experiences and there is an overuse of free camping;
- the Tasmanian Wilderness is viewed as only for “intrepid travellers”;
- Purnululu and the Wet Tropics have ongoing land tenure issues which makes tourism planning difficult;
- Riversleigh and Naracoorte have issues with fossils being stolen; and
- the Blue Mountains has issues with a lack of evening activities and illegal camping and dumping of waste.

For the international sites in particular:

- informal trails are a challenge in the Canadian Rockies;
- visitor numbers are exceeding the Peru government and UNESCO-agreed figure of 2,500 visitors per day; and
- Te Wahipounamu has issues with illegal campsites and campers not properly disposing of their waste.

⁸⁶ Prices converted to AUD from original currencies on 29 July 2016.

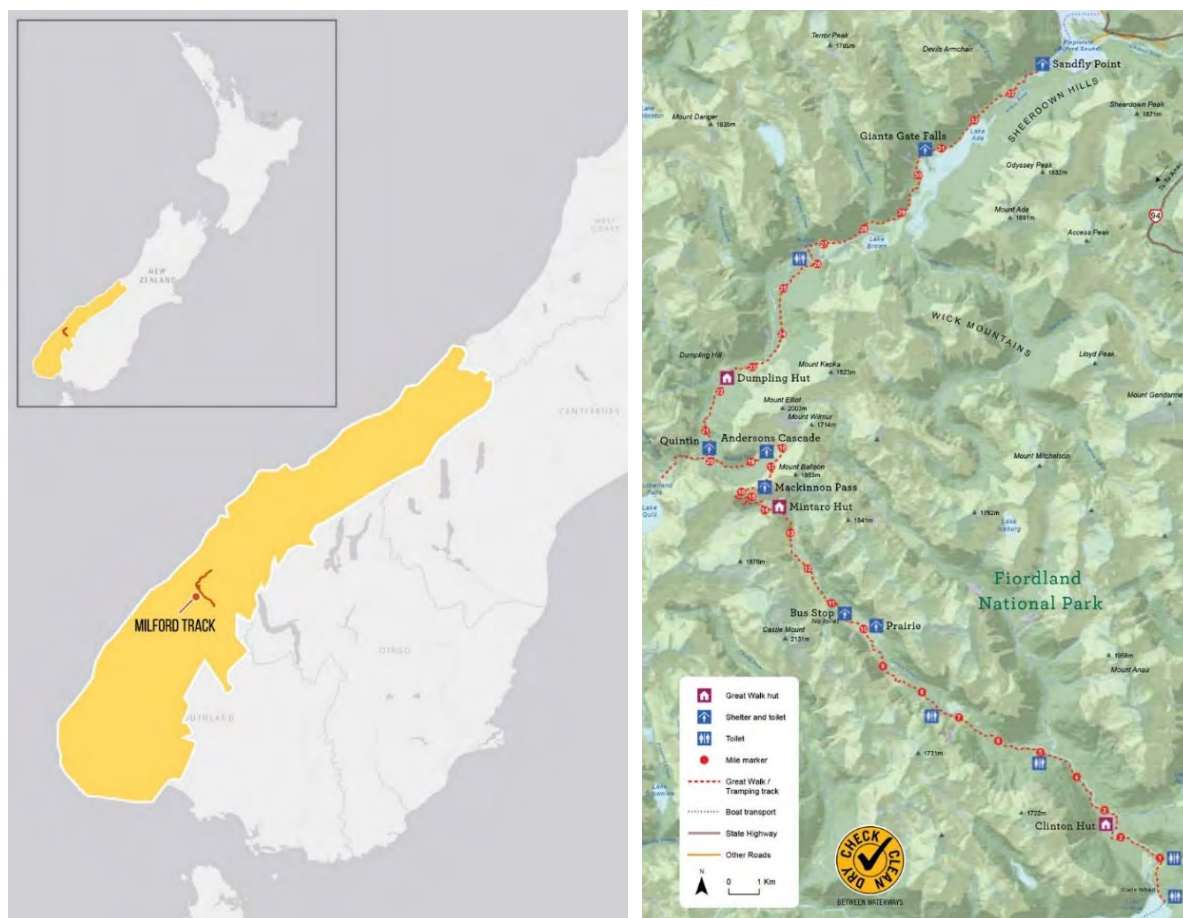
5.4. Best Practice Treks

5.4.1. Milford Track, New Zealand



The model which offers a useful global best practice example is the Milford Track in Fiordland, New Zealand. The Milford Track is a trek through the Te Wahipounamu WHS (Figure 36). The trek generally takes 4 days and is 53.5 km one way, passing by lakes, waterfalls, soaring mountain peaks and deep valleys. It is recommended for people who have a moderate level of fitness and has designated overnight accommodation stops for each night. The trek can be completed via a self-guided option, using Department of Conservation cabin accommodation, or through the licensed commercial operator (Ultimate Hikes) who have private accommodation along the track and have exclusive rights for guided overnight tours on the track.⁸⁷ Other commercial operators are permitted to operate on the track, but only for day treks (Table 16).

Figure 36: Map of the Milford Track



⁸⁷ If other companies are marketing overnight tours, they are add-on selling from either of these two options.

Table 16: Example of Milford Track Tours⁸⁸

Operator Name	Length	Group Size	Price ⁸⁹	Inclusions
Trips & Tramps	½ day	Small	\$118	-
Real Journeys	1 day	12 max	\$184	Coach from Te Anau, 1-hour scenic cruise across Lake Te Anau, lunch provided
Ultimate Hikes	4 days	50 max	From \$1,959	Accommodation, breakfasts, lunches, dinners, snacks, backpacks, rain jackets, hot showers

Figure 37 illustrates the topography of the trek and estimated distances and times to complete each leg.

Figure 37: Milford Track Profile Map



While camping is prohibited along the Milford Track, there are accommodation options ranging from multi-share huts for freedom walkers to private rooms with hot showers, handwashing facilities, generated electricity and prepared meals for organised tours. The Ultimate Hikes Tours book out months in advance, which demonstrates that there is market demand for these guided higher quality options.

5.4.2. Overland Track, Tasmania

The Overland Track in Tasmania is an example of a best practice trek (Figure 38), with walks typically lasting from 4-6 days (~50km). The track is situated in the Tasmanian Wilderness WHS and is recommended as an introduction to overnight treks with a mix of camping and cabin accommodation available. Highlights include viewing the spectacular Cradle Mountain, Crater Lake, Plateau Creek and Lake Ayr.

The Overland Track can be completed with commercial guided tours or as a self-guided option. Table 17 provides examples of commercial tours which offer a 3-night, 4-day trekking option. Longer treks are also offered, including a 5-night, 6-day option.

Figure 38: Overland Track¹



⁸⁸ Milford Track Guided Walk, 2012, Trips & Tramps; Milford Track Guided Day Walks, 2016, Real Journeys; Milford Track Bookings – Pricing & Departures, 2016/17, Ultimate Hikes New Zealand

⁸⁹ Converted from NZD to AUD on 11 August 2016

Table 17: Example of Overland Track tours

Operator Name	Length	Group Size	Price	Inclusions
Cradle Mountains Huts	4 days	10 max	\$3,190	Professional guides, hut accommodation
Park Trek	4 days	10 max	\$1,480	Professional guides. 3-star cabin-style accommodation, all transport, all meals

Figure 39: Overland Track Highlights⁹⁰



The Tasmania Parks and Wildlife Service offers huts and camping along the Overland Track for freedom walkers. Although huts are provided, there is no booking system hence tents must also be carried. An Overland Track Fee⁹¹ (\$200 for 2015-16) and National Parks Pass must be paid.

5.5. Key Success Factors Applied to the Blue Mountains

While we are not recommending that the Blue Mountains replicate the development/operational models of other natural WHSs and best practice treks, there are some practices worthy of consideration.

Table 18 indicates key practices including:

- encouraging a wide market to undertake treks;
- finding attractive revenue streams to support tourism-related employment;
- identifying ways of helping to meet the cost of track maintenance and upgrades;
- supporting the notion of accommodation development in or on the fringe of the national park;
- integrating eco-friendly and quality tourism activity with national park plans of management; and
- raising the profile of the Blue Mountains nationally and internationally.

⁹⁰ Cradle Mountains Huts

⁹¹ Funds long-term sustainable management of the track such as trackwork, hut maintenance, toilets, signage, interpretation and staffing



Table 18: Key Success factors applied to the Blue Mountains

1.

A Mix of Accommodation Options Within or on the Outskirts of World Heritage Sites

The Blue Mountains has a unique competitive advantage over many other WHSs, given its proximity to a major international gateway, Sydney. It is also situated within close proximity to a large urban population catchment (4.9m people). Sydneysiders are considered to be increasingly time poor⁹² and searching for unique "short break" getaways that enable them to escape from the urban environment.

Whilst the Blue Mountains does have a mix of accommodation, the vast majority of this is located within close proximity to the town/urban centres (Katoomba, Leura etc.). The comparative assessment completed revealed that many of the WHSs have a variety of accommodation options within their boundaries, including camping, glamping, lodges, 3-5 star hotels, the majority of which were also within close proximity to the entrance (such as the Wet Tropics, Kakadu, the Tasmania Wilderness, Great Smoky Mountains National Park and the Grand Canyon, by way of example).

Best practice accommodation options appear to include those which complement and blend in with the surrounding natural environment. Glamping, in particular, offers the potential to be eco-certified to ensure minimal environmental impact and provide visitors with a unique accommodation experience.

2.

Signature Trail (3 days, 2 nights)

In order to grow the overnight visitor market to the Blue Mountains, the creation of one signature overnight trail should be explored. Most of the Australian overnight trails assessed (such as Wet Tropics Great Walk, Koolpin Gorge to Twin Falls, Piccaninny Gorge Walk) were challenging and aimed at experienced hikers, while many of the overseas sites assessed (such as Great Smoky Mountains, Grand Canyon, Canadian Rocky Mountains and Te Wahipounamu) offered overnight trails targeting both beginner and experienced hikers. The Blue Mountains does not have any signature overnight walks nor is there any accommodation offered for walkers within the BMNP beside limited camping sites. Potential exists to develop a signature Blue Mountains trail aimed at introductory level walkers, lasting a maximum of 2 - 3 nights.

In order to encourage a novice and, consequently, a broader market, it would be beneficial to have the trail connected to either nearby villages with accommodation options close to park entry, or ideally accommodation within the park (including cabins, lodges, or glamping). This would cater for those visitors who would like to have the overnight hiking experience with added comforts.

A trail should be selected which includes secluded waterfalls, unique landforms and rich biodiversity areas which you would not be able to experience without the effort of traversing such a trail, rather than simply visiting more common visitor destinations in the region. By way of example, the Milford Track crosses McKinnon Pass and there is a sense of accomplishment for the trekkers once they have reached the summit. A similar experience which evokes a sense of accomplishment could be an important value-add for a Blue Mountains signature trail.

Another distinguishing feature of the global best practice signature trails was the online marketing which promotes the treks. Any signature trail should be marketed with an interactive website including a map, terrain profile, day-to-day itinerary including estimated distance and walking time and accommodation options. It would be ideal to produce a brochure and e-brochure promoting the trail.

3.

Shorter Overnight Trail (2 days, 1 night)

An overnight trail is likely to also help to grow the overnight visitor market to the Blue Mountains. The trail could be aimed at an introductory walker market, particularly walkers who have not completed an overnight hike before. A mix of medium to high-end accommodation options could be considered within the BMNP, or along the fringes of the BMNP, such as lodges and glamping.

Value adds such as luxury experiences may also help to encourage a beginner market. For example, the Copland Track in New Zealand includes an 18km trek on the first day which ends at the Welcome Flat hot pools and hut accommodation is located nearby. This provides introductory trekkers with a chance to relax and soothe muscle fatigue from their day's hike.

The Blue Mountains could also explore spa/massage and other luxury options within the BMNP or along its fringes.

⁹² <http://ausfoodnews.com.au/2014/09/15/more-time-poor-aussies-opting-for-ready-made-meals.html>



4. Series of Half Day/Short Walk Experiences

There are various high-quality day walks in the Blue Mountains including the Grand Cliff Top Walk, Three Sisters Walk, National Pass and the Grand Canyon Track. These half day walks are already a signature product of the LGA, with Council and the NPWS maintaining tracks. Potential exists, however, to promote these and other walks via the suggested destination website and app.

The proximity of the Blue Mountains to the major international gateway of Sydney should be considered an opportunity, particularly because of the potential to capture a greater share of the high yielding cruise ship market (with clever packaging development). A short or half day walking experience could be ideal for cruise ship visitors or those seeking a less active experience.

A signature short walk option could be identified for the Blue Mountains, which provides further value adds and has an emphasis on highlighting unique interpretation of flora/fauna and geological landforms.

5. Offering Unique Experiences such as Gondola Ride, Zip Line, Skywalk

Recognising that not all visitors travel to experience the same thing, some WHSs offer additional experiences, events and attractions. The Canadian Rocky Mountains offer gondola rides, zip lining, a Rocky Mountaineer train luxury gold service, river rafting and a glacier skywalk. Te Wahipounamu offers stand up paddle boarding, kayaking, canoeing, skydiving, glacier hot pools, boat and fishing tours. This is an important aspect to recognise and this reflects the success of Scenic World and its various value-added experiences.

6. Trekking and Attractions Packaging

To appeal to visitors who enjoy exploring the natural environment as well as cultural, food and day spa attractions the potential exists to develop a combined trekking and attractions package. The Canadian Rockies, for example, have a Food Lovers Self-Drive package, including 7-day car hire, accommodation, brewery tour, progressive dinner, horseback trail ride, canoe experience and gondola ride. These experiences take place within and outside the periphery of the WHSs.

Various options could be developed for the Blue Mountains, including trek and spa treatment packages, or a trek, food & wine trail package using the extensive eateries throughout the Blue Mountains and day spa/wellness centres.



6. CHALLENGES

The following section outlines challenges (in alphabetical order) which were identified during the consultation and analysis undertaken for this DMP.

Section 7 of this DMP highlights opportunities which provide further detail on how many of these challenges can be mitigated and positive outcomes achieved.

6.1. Product & Supporting Infrastructure Challenges

6.1.1. Cost of Trail Maintenance

The Blue Mountains has a number of walking trails which require maintenance and upkeep by Council and the NPWS. These trails generate little, if any, direct revenue and maintaining them in an environment of declining government funding is challenging.

The revitalisation of tracks and related amenities will require new revenue streams.

As walking track experiences become more heavily promoted by Council and the NPWS and industry operators are keen to capitalise on their revitalisation, demand for second tier (currently non-iconic) tracks will appear which may fuel greater visitation and visitor dispersal into the BMNP and reserve lands.

There is a reluctance by various government agencies to develop new trails/tracks for walking/mountain biking, unless revenue streams are introduced to help offset the ongoing costs of maintenance.

6.1.2. Freedom and Illegal Camping

Most camping grounds within the wider Blue Mountains region offer free camping, with limited sites being pay-for. There are sites throughout the LGA, particularly car parks, where visitors often camp illegally.

Providing experiences for free can be challenging from a marketing perspective as often this can, unintentionally, devalue the visitor's perception of an experience; "it is free, it must not be worth it". The international visitor market is often conditioned to paying for experiences and expects to pay for high-quality natural experiences, as do Australians who travel overseas.

Whilst there is a place for freedom camping, the prevalence of such camping in the LGA is challenging, particularly as this puts pressure on Council and the NPWS for facility maintenance and upgrades. There is a need for an assessment of freedom camping and the potential to convert some sites (particularly those with facilities such as toilets etc.) to pay-for-use sites with a fee.

6.1.3. Large Number of Small Operators

Despite being rated as one of Australia's "must see" visitor experiences, the Blue Mountains has very few large-scale commercial operators.⁹³ Whilst the boutique nature of many operators in the LGA may offer a more personalised experience for visitors, there is a balance required as larger-scale operators tend to bring with them larger marketing budgets which not only markets their product but also the region. Aside from Scenic World, the Blue Mountains Adventure Company and some of the larger

⁹³ Aside from the larger accommodation properties and Scenic World.

accommodation properties, the Blue Mountains has limited export-ready product which can be marketed domestically and internationally.

6.1.4. Lack of a Tour Coach Drop Off Area at Leura

There is a need to introduce a tour coach drop off area in Leura. Major coach companies need an area in Leura where coaches can safely drop off passengers, avoiding traffic congestion and allowing visitors more time to spend in the village (Council has recently completed a Leura Tourist Bus Strategy which acknowledges this challenge and identifies a range of potential locations for a coach drop off area within Leura).

6.1.5. Lack of Evening Activities

The Blue Mountains has a lack of evening activities for visitors. This makes it challenging to convince the day tripper market to convert their trip into an overnight visit and can also mean that residents, particularly families, travel outside of the LGA to engage in evening activities.

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

6.1.6. Large Event Calendar

The Blue Mountains has a busy calendar of events (Section 4.4). There is a need to condense the calendar and focus on events which generate economic, social and community benefits. The 2015 Calendar of Events provided by Council⁹⁴ demonstrated that the LGA held 287 events. Additional desktop research found a further 10 events planned for 2016/2017.⁹⁵

Council is planning to develop an events strategy for 2017 – 2018. It should include an assessment of:

- the cost of running the event;
- the revenue generated by the event;
- the amount of Council funding;
- the community patronage of the event;
- the visitor patronage of the event;
- the other benefits generated by the event (cultural awareness, volunteer engagement etc.); and
- the net economic and social benefit achieved.

This will assist Council in identifying events which are performing well and generating a wide range of benefits, as opposed to those for which funding may be better invested elsewhere.

For any new events that groups/individuals are seeking to introduce, performance criteria could be developed to assess the estimated economic, cultural and social etc. benefits to be generated.

⁹⁴ The Group also added to this event calendar based on desktop research.

⁹⁵ visitbluemountains.com.au; visitsw.com

6.1.7. Lack of Experiences for the Under 10s Market

Whilst the LGA has a wide range of soft and hard adventure experiences, these are not always suitable for the family market with children under 10 years of age. There is a need to investigate the introduction of experiences for younger children, such as high ropes and aerial courses, outdoor mazes and indoor fun parks etc. Indoor family product would also be of benefit to local families.

6.1.8. Lack of Room Capacity

The Blue Mountains has a long history of providing commercial accommodation: the Hydro Majestic; the Carrington and other heritage properties have provided accommodation for many years. Many of these properties are in the upper mountain villages. There remains, however, a lack of larger accommodation properties that can cater to demand, particularly during peak visitor periods, which impacts on the ability to convert day trippers to overnight visitors, to encourage a longer length of stay and to support conferences and events. Though commercial accommodation development of a large scale is often more challenging to achieve given the lineal nature of the LGA's urban area and limited available sites in village commercial centres, potential may exist to encourage more boutique development, particularly where this can be encouraged on the edge of the BMNP.

Additionally, to support a purpose-built conference and event centre, a large adjoining hotel facility is required.

6.1.9. Limited Pay-For Experiences

Of the eight Australian WHSs evaluated, only four have free entry. However, whilst Purnululu National Park offers free entry for those travelling on foot or by bicycle, motor vehicle charges do apply. Of the six international WHSs examined, three have entry fees, while three offer free entry.

Table 19: Entry Fees for Comparative World Heritage Sites

Site	Entry Fees
Greater Blue Mountains Area	Free entry, though we understand Council is investigating user-pays mechanisms. Income from this would be reinvested for upgrades and maintenance.
Australian Fossil Mammal Sites	Free entry
Gondwana Rainforests of Australia	Free entry
Kakadu National Park	Adult: \$40 Children: \$20 (Dry Season) Adult: \$25 Children: \$12.50 (Tropical Summer season)
Purnululu National Park	Free entry if enter on foot/bicycle, \$12 per car
Tasmanian Wilderness	\$12 per person/ \$24 per car (Cradle Mountain - Adult: \$16.50 Child: \$8.25)
Uluru-Kata Tjuta National Park	Adult: \$25 Children: \$12.50
Wet Tropics of Queensland	Free entry
Canadian Rocky Mountain Parks	Adult: CAD \$9.80 Child CAD \$4.90
Historic Sanctuary of Machu Picchu	Adult: 128 Peruvian Nuevo Sol (USD \$38.19)
Grand Canyon National Park	USD \$30 per car
Great Smoky Mountains National Park	Free entry
Te Wahipounamu – South West New Zealand	Free entry
Tongariro National Park	Free entry

Whilst offering free access to the GBMA and, more specifically, the BMNP, brings a variety of benefits such as increased exposure to the natural environment and education opportunities, it also places an increased burden on Council and State Government (the NPWS, RMS etc.) for the maintenance and upkeep of the BMNP and its infrastructure (parking, toilets, trails etc.). There is a desire by Council and the NPWS to upgrade the trails (including providing more wheelchair and pram accessible trails), parking, toilets etc., however, declining State Government funding and little-to-no income being generated by users of the natural areas and its facilities makes it challenging.

International markets are conditioned to paying entry fees for national parks, particularly where it is clear that the entry fee is applied to the maintenance of the national park.

The large number of access points into the BMNP will make it particularly challenging to charge an entry fee. The potential exists, however, to introduce pay-for-use parking.

Whilst Echo Point is not located within the BMNP, it is located right next to it and a pay-for-use parking fee is charged and this income is put back into managing the Echo Point precinct. We consider this sets a precedent which should be followed.

There is also a need to investigate introducing pay-for-use fees for the various coach companies who operate tours into the Blue Mountains. There has been a surge in the number of smaller tour companies visiting the Blue Mountains who pay no entry or parking fees and who contribute little to the Blue Mountains economy whilst using roads, toilets and parking facilities etc. There is a need to ensure these operators contribute to the use of these facilities/services.

6.1.10. Limited New Investment

There has been limited, new, privately funded tourism investment in the LGA. Lack of investment and reinvestment exists not only in tourism but across other commercial sectors, as evidenced in some of the retail and food and beverage offerings in villages in the LGA.

While the investment market often seeks opportunities close to the fringe of national parks to enable the clustering and packaging of commercial tourism experiences, state government directed planning controls appear to focus on town centres. There are also significant limitations due to bush fire controls.

6.1.11. No Overnight In-Park Trekking

Figure 40 provides an overview of a commercially guided trek available through AusWalk. AusWalk offers two guided walks (which are also available in self-guided format) in the Blue Mountains: a 5 or 7 day “Blue Mountains Grand Traverse” or a 3 day “Blue Mountains Weekender”. The overview demonstrates the indicative stops⁹⁶ provided in the 7 day “Blue Mountains Grand Traverse” walk. After the treks are completed each day, tour participants are transported into the primary tourism hubs of Mount Victoria, Blackheath, Katoomba or Leura for accommodation rather than accommodation within the BMNP.

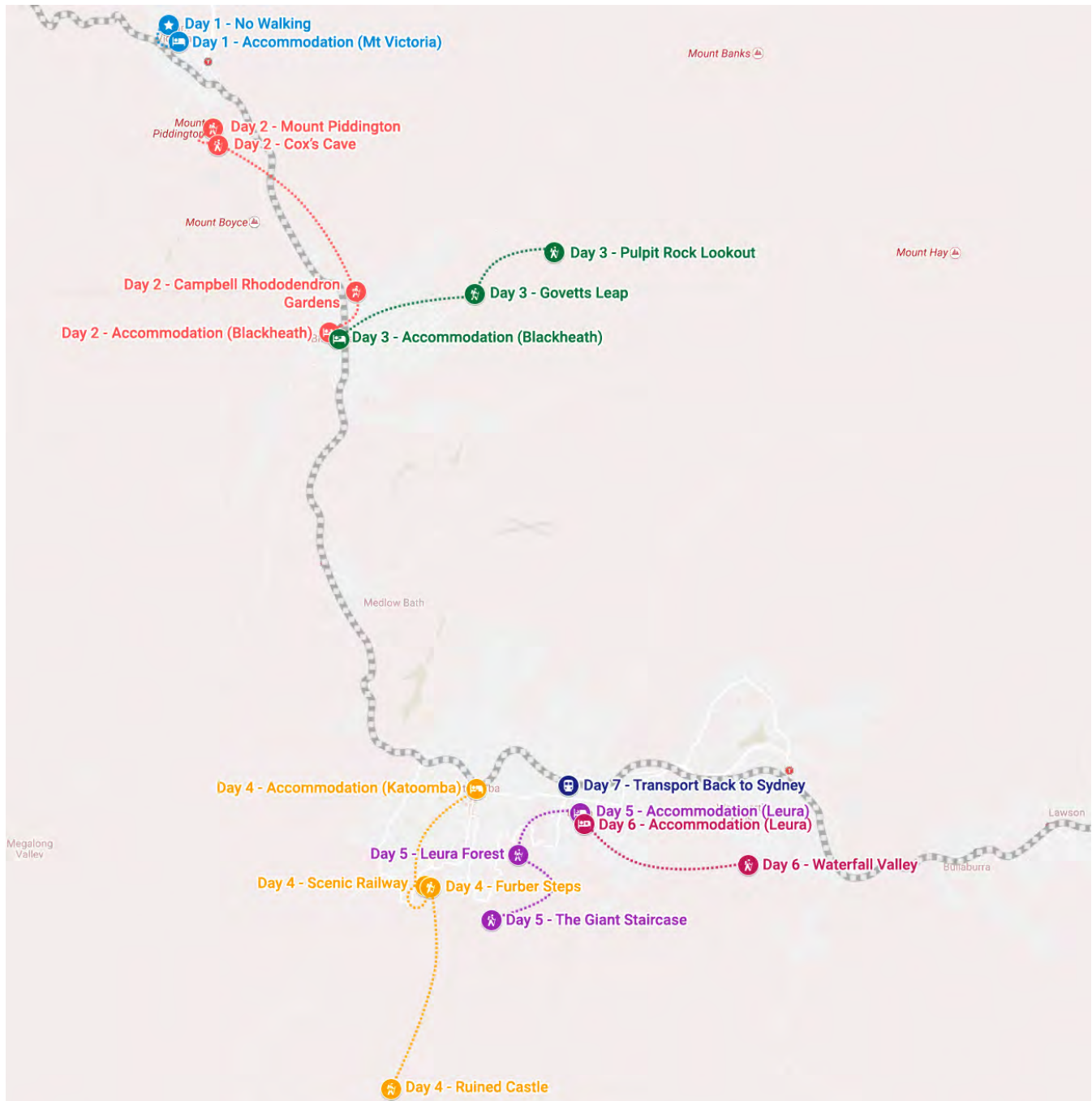
Great walks in North America, Europe, parts of Asia and New Zealand etc., provide visitors with the chance to stay overnight within a national park in a variety of accommodation options. While the AusWalk Blue Mountains trek integrates well with the villages in the Blue Mountains and “spreads the tourism dollar” through using accommodation, cafés etc., this format of walk may not appeal to the segment of walkers who want the chance to experience, in a guided or self-guided capacity, the BMNP over 2 – 5 days without having to re-enter an urban environment each night.

There is a need to investigate overnight walks which use new eco-friendly accommodation within the BMNP (glamping, eco-friendly chalets) or on the fringes of the BMNP, but which still provide visitors with an experience of being in an isolated natural environment.

⁹⁶ It is important to note this is purely an indicative overview and represents stop only as outlined in the AusWalk brochure. It does not provide an overview of the actual walk trails followed.

The Sydney Catchment Authority have control over significant parcels of national park land which contain major waterways and which restrict entry for walkers. This would need to be carefully assessed when developing the concept for a multi-day in-park trek.

Figure 40: AusWalk's Blue Mountains Grand Traverse 7 Day Trek⁹⁷



⁹⁷ Based on the itinerary provided at: <http://auswalk.com.au/walks/blue-mountains-grand-traverse/>

6.1.12. Parking (Coach and Car)

One of the major issues discussed by stakeholders was vehicle parking (for coaches and cars), near visitor attractions, with some locations seemingly reaching capacity.⁹⁸ Any increase in self-drive visitors during peak periods is likely to compound existing parking challenges.

An assessment of potential public transport solutions, such as shuttle buses to major attractions, could be undertaken to reduce parking congestion during peak periods, providing major parking stations can be introduced for the self-drive market.

6.1.13. Unlicensed Tour Operators

Unlicensed tour operators using minivans and small buses are encroaching on the businesses of licensed operators. To ensure an equitable approach, all tour operators should be licensed. Ways of preventing unlicensed tour operators using facilities need to be investigated.

6.2. Marketing Challenges

6.2.1. Branding and Cross Tenure Management

There is a challenge associated with having various visitor touch points in the LGA managed by different agencies, including Council and the NPWS. There is a need to ensure that:

- the level of quality of experience is consistent; and
- the branding of the experiences is uniform.

Echo Point lookout and VIC were developed by Council. This is not well understood. By contrast, the visitor centre and lookout at Govetts Leap is managed by the NPWS. The quality of experience between the two differs significantly yet the visitor market is not aware of this.

A consistent level of quality of product, service and infrastructure is required.

6.2.2. Lack of Product Packaging

There is limited product packaging available on destination-based websites⁹⁹. There is a need to develop packages on the Blue Mountains destination website which visitors can book, rather than providing suggested itineraries. Packages could include accommodation, transport, guided walks/cycling, food and beverage, spa treatments etc.

⁹⁸ We understand that Echo Point, Blackheath and Leura car parking is now at capacity. We also note that Scenic World is challenged by limited parking, although, they do have overflow strategies in place.

⁹⁹ Existing product packaging is primarily undertaken by the larger accommodation properties such as Lilianfels, Mountain Heritage Hotel, Hydro Majestic, The Carrington, Palais Royale and The Clarendon Guesthouse. Examples of packages include the following:

Lilianfels: Gourmet Getaway Package: Accommodation, Buffet breakfast in Orangery Restaurant, dinner at Darley's Restaurant of Echoes Restaurant; Indulgence package: Accommodation, Buffet breakfast in Orangery Restaurant, dinner at Darley's Restaurant of Echoes Restaurant, 2 X60min Aroma Relax Massages at Lilianfels Day Spa, complimentary wine and chocolate.

Mountain Heritage Hotel: Yulefest 2-night Weekend Package: Accommodation, buffet breakfast, Pre-dinner drinks, 5 course Yulefest Dinner, Performances, Santa visit, Professional Photo, Christmas deserts; Various Spa Packages which include Accommodation, Full Breakfast, Wine and chocolate and Spa Treatments at Spa Sublime.

Hydro Majestic: Golf Stay & Play Package: Overnight accommodation, full buffet breakfast for 2 adults, voucher for 1 round of 18 holes of Golf for 2 Adults at Blackheath Golf Course, including cart hire; and Yulefest Package: Accommodation, full buffet breakfast, 5 course Degustation Yulefest dinner in the Wintergarden.

The Carrington: Blue Mountains Escape: Accommodation, Continental buffet breakfast for 2, 2 tickets to Scenic World, Sparkling wine.

Palais Royale: Yulefest Package: Accommodation, full breakfast in Gazelles Restaurant, 4 course traditional Yulefest dinner in Gazelles Restaurant

The Clarendon Guesthouse: Various packages with shows, dinner & accommodation

Currently, to obtain a coordinated experience, one must visit the LGA using a structured tour package. This does not work for those wanting an overnight stay experience and a more “bespoke” program of dining, walks, shopping and accommodation. And it does not work for free independent travellers wanting to coordinate various activities to generate a bespoke experience.

6.2.3. Lack of Diverse Brand Attributes

While the Blue Mountains appears to have strong international brand caché, this is primarily centred on the Three Sisters as a day trip visit. In inclement weather, the Three Sisters is often shrouded in mist. Visitors complain that the total Blue Mountains experience was unappealing. This is because too much emphasis is placed on one experience, rather than offering a more comprehensive experience which can compensate for such a scenario. There is a need to undertake a comprehensive branding exercise to position the Blue Mountains strategically and to provide clarity on what the “Blue Mountains” is as a destination.

While the domestic and international visitor markets understand that the Blue Mountains are scenically attractive, there is a need to demonstrate the unique selling points for the LGA.

6.2.4. Lack of Unity Behind a Destination Brand

While the Blue Mountains brand name is well recognised, the collateral associated with it (taglines, brand values, vision and design etc.) is inconsistent. This is impacting on the ability of operators to define destination markets and what the destination represents.

There is a need for a destination brand and related collateral to be created for the LGA by a highly experienced destination brand specialist.

6.2.5. Limited/Fragmented Digital Presence

Much effort has been expended by the Blue Mountains Accommodation and Tourism Association (BMATA) in developing www.visitbluemountains.com.au. The website has a large amount of information, but the design does not reflect the spectacular natural environment and built experiences/product offered. Additionally, BMATA only represents its members’ product on its website rather than all tourism operators in the LGA.

6.3. Planning and Land Use Challenges

6.3.1. Ageing Population

An ageing population is challenging as the elderly generally rely more heavily on support facilities and resources and may be less enthusiastic about new or expanded tourism development due to perceived impacts on lifestyles. The disproportionately larger older aged resident demographic in the Blue Mountains is likely to continue to put pressure on the need for more health and social services to support their needs. While this age group may not be interested in encouraging greater tourism development within the LGA, without new development and new jobs for locals, the ability to attract younger people to consider the LGA for work and relocation is likely to be constrained.

6.3.2. Bushfire Regulations and Restrictions

Development within the LGA is constrained by bushfire regulations. Major bushfires, including those in the past few years, have made State Government and Council cautious about allowing tourism development too close to bushfire containment lines. This adds pressure on tourism development to sit alongside commercial and residential development with such limited sites to choose from. The option to cluster tourism development may mitigate bushfire risks and avoid resistance from the residential and

commercial communities. That said, visitors do not come to stay in town centres, they come to stay within view of the dramatic escarpments and bushland backdrops.

Finding areas to allow for new tourism development clusters close to natural assets will be important for sustaining and growing the visitor economy.

6.3.3. Geographic Layout

The LGA is lineal with a well-defined narrow urban corridor running along the ridge line. Most villages and accommodation and recreation facilities are located along the Great Western Highway. The region is also characterised by steep escarpments. The development of long treks and rides can be challenging with steep descents and ascents.

Additionally, the lineal layout makes the creation of tourism clusters challenging. Access to the edges of the BMNP is desirable for sustainable visitor growth.

6.3.4. Heritage Development Constraints

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

6.3.5. Precursors to Attracting Investment

Precursors to attracting investment into new tourism product in the LGA were identified.

- Profit centres (kiosks and refreshment rooms etc.) are needed to offset cost centres (boardwalks, car parks and trails etc.).
- Carrying capacities, hours of operation and the number of indoor and outdoor seats allowable at tourism sites should be specified in planning instruments to provide a clear guide to developers and operators.
- Small (1 – 2 bedroom) B&Bs should be exempted from providing expensive modifications to properties for the disabled as most disabled guests tend to prefer to stay in medium to larger properties that better cater to their needs.

6.3.6. No In-Park Accommodation

Despite domestic and international demand for overnight treks, the BMNP does not offer in-park accommodation to cater for overnight trekking. Other WHSs in Queensland and Tasmania do offer in-park accommodation while retaining their pristine environment. The development of in-park accommodation for the BMNP should be considered.

6.3.7. State Government Planning Standard Instruments

It is noted that various State Government policies limit the ability of Council, at times, to offer greater flexibility for development approvals because of standard planning instruments and the tight interpretation required of these. It may be necessary for Council to lobby State Government to allow for greater flexibility of planning instruments. Industry, Government and Council need to determine solutions for relaxing certain planning constraints.



6.4. Challenges and Potential Solutions

Table 20: Challenges and Potential Solutions

Challenge	Linked Opportunities
Ageing Population Requirements	<ul style="list-style-type: none"> Increased employment opportunities for youth Increased investment in tourism developments, attractions and supporting infrastructure
Bushfire Regulations and Restrictions	<ul style="list-style-type: none"> Consideration of development of the periphery of the BMNP
Cross Tenure Management Branding Challenges	<ul style="list-style-type: none"> Review of branding to better position and market the Blue Mountains
Freedom and Illegal Camping	<ul style="list-style-type: none"> Access to fee-paying sites Timed parking or fee-paying Council parking sites
Geographic Layout of the Blue Mountains	<ul style="list-style-type: none"> Tourism clusters in villages or on the BMNP's periphery
Heritage Development Constraints	<ul style="list-style-type: none"> Recognition of inestimable value of authentic historic sites
Large Number of Small Operators	<ul style="list-style-type: none"> Need for larger players to leverage marketing spend and more jobs
Lack of Evening Activities	<ul style="list-style-type: none"> Development of new product especially to convert day trips into overnight stays and to cater to the under 10s market (night walks, sound and light shows, evening events and festivals etc.)
Lack of Experiences for Under 10 Market	<ul style="list-style-type: none"> New attractions and experiences Targeted marketing
Lack of Product Packaging	<ul style="list-style-type: none"> Website which allows packaging of product
Lack of Room Capacity	<ul style="list-style-type: none"> New accommodation and destination holiday parks Potential for large well-known operator
Lack of Tour Coach Drop Off Area	<ul style="list-style-type: none"> New dedicated spaces for coaches and mini-buses
Precursors to Investment	<ul style="list-style-type: none"> Establish clear planning laws Exempt B&Bs from onerous regulations Develop profit centres to cover the costs of Council and NPWS maintenance
Lack of unity behind a destination brand	<ul style="list-style-type: none"> New destination brand to unite whole of LGA
Lack of diverse brand attributes	<ul style="list-style-type: none"> Change brand attributes to hold more appeal
Limited Charge-For Experiences	<ul style="list-style-type: none"> New fee-paying attractions
Limited New Investment	<ul style="list-style-type: none"> Offer sites and zoning for new development
Limited/Fragmented Digital Presence	<ul style="list-style-type: none"> New digital platform
No accommodation in the BMNP	<ul style="list-style-type: none"> Introduce an iconic Great Walk with overnight accommodation
No overnight In-Park Trekking	<ul style="list-style-type: none"> Introduce an iconic Great Walk with overnight accommodation
Parking (Coach and Car)	<ul style="list-style-type: none"> Create dedicated car parking/layover area; some fee paying
Large Event Calendar	<ul style="list-style-type: none"> Better management and consolidation of large event calendar
State Government Planning Standard Instruments	<ul style="list-style-type: none"> Assess additional SP3 Tourism Zone's and a dedicated tourism precinct
Trail Maintenance	<ul style="list-style-type: none"> Develop commercial revenue generating solutions
Unlicensed Tour Operators	<ul style="list-style-type: none"> Better controls of operators



7. THE OPPORTUNITIES

The following opportunities (in alphabetical order) are identified to support the growth of sustainable tourism activity within the Blue Mountains. They have been segmented according to product area.

- Accommodation
- Attractions/Experiences
- Destination Awareness, Branding and Visitor Services
- Supporting Infrastructure/Projects

Many opportunities will be subject to feasibility studies, investigation and planning approvals. They are suggestions only.

7.1. Accommodation

7.1.1. Destination Holiday Park

The LGA offers traditional (Figure 41) transit/caravan park accommodation. The potential exists to introduce a destination holiday park (Figure 42) into the Blue Mountains' accommodation mix.

Over the past 15 years, the domestic caravan, motorhome and camping industry has been fast growing. Caravan and RV registrations have increased by more than 250%¹⁰⁰. The industry is worth \$19 billion nationally and generates 11m overnight trips.¹⁰¹ Savvy operators are responding to consumer demand for better standards and facilities by transforming traditional transit parks into holiday/destination parks.

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

Destination holiday parks offer a mix of facilities to guests such as: swimming pools, aquatic parks, kids clubs, camp kitchens, mini-golf, group entertainment and shops etc. These parks are attracting family market visitors who use the parks as a base for day excursions to surrounding regions.

A destination holiday park will need:

- land area of 6 ha or greater;
- capacity for 80 - 120 powered sites and 60 – 100 non-powered sites and 25 - 30 cabins/chalets;
- a focus on visitors rather than permanent residents;
- a family friendly focus to attract the family market and to convert day trips into overnight stays;
- best practice design of facilities;
- amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, kids' playground (including a giant jumping castle), daily children's activities, a café and a convenience store; and
- easy access to major roads and highways.

¹⁰⁰ <http://www.caravanningnews.com/penrth.htm>

¹⁰¹ <http://www.smh.com.au/small-business/growing/australias-caravan-industry-worth-19-billion-and-growing-20160722-gqbgp5.html>

Figure 41 shows pictures of four traditional caravan parks. Often these parks have basic facilities and are used as transit parks by travellers (i.e. overnight accommodation when travelling between two destinations, rather than as a destination in their own right).

Figure 41: Traditional Caravan Parks



Canobolas Caravan Park, NSW



Burrum Heads Beachfront Tourist Park, QLD



Goomalling Caravan Park, WA



Tuncurry Beach Holiday Park, NSW

Figure 42 shows pictures of destination holiday parks. These parks usually feature a combination of RV/caravan/camping sites as well as chalets, waterparks, pools and water slides, kids' playgrounds, game rooms, biking trails, cafés and shops.

Figure 42: Destination Holiday Parks



Deniliquin Holiday Park, NSW



MacDonnell Range Holiday Park, NT



Pambula Beach Discovery Holiday Park, NSW



Merimbula Beach Holiday Park, NSW

A feasibility and site assessment exercise should be undertaken to determine the most appropriate sites for one or more destination holiday parks and to assess levels of investment interest. The Blue Mountains could become a hub for caravaners/RVs for greater Sydney.

7.1.2. Govetts Leap Chalets

There is increasing demand for authentic nature-based and immersive travel experiences (e.g. Antarctica, Northern Lights, Great Walks, safaris, jungle tours). The Blue Mountains can capitalise on this by developing small-scale, eco-friendly accommodation close to the boundaries of the BMNP or on previously cleared sites within the BMNP.

The picnic ground at Govetts Leap (Figure 43) could allow for 8 – 10 small, eco-friendly chalets. This site is located within the Govetts Leap Lookout precinct, back from the Lookout and could be cleverly buffered by vegetation. Such a development might position Govetts Leap as a significant national park site and would help spread visitor demand. The views from Govetts Leap are spectacular as are the trails which can be accessed from the Lookout.

Figure 43: Potential Location for Eco-Friendly Chalet Accommodation



Figure 44 provides pictures of some best practice examples of eco-friendly chalets and glamping tents built to complement their natural surroundings.

Figure 44: Best Practice Eco-Friendly Chalets/Lodges¹⁰²



Development of accommodation facilities at Govetts Leap may increase visitation to the Blue Mountains Heritage Centre (currently one of the least visited NPWS centres¹⁰³). It may also grow demand for visitation to Govetts Leap and help alleviate pressure on Echo Point and Wentworth Falls.

Figure 45 provides schematics of potential eco-friendly accommodation at Govetts Leap.

¹⁰² O'Reillys Mountain Villas, Lamington National Park, Brisbane; Natural Retreats, UK; Nightfall Camp, Lamington National Park, Brisbane; and Herbal Glamping Resort, Slovenia

¹⁰³ Out of five other NPWS visitor centres located along the north and southern coasts of NSW and Based on work The Group has previously completed.

Figure 45: Govetts Leap Eco-Friendly Accommodation Schematic



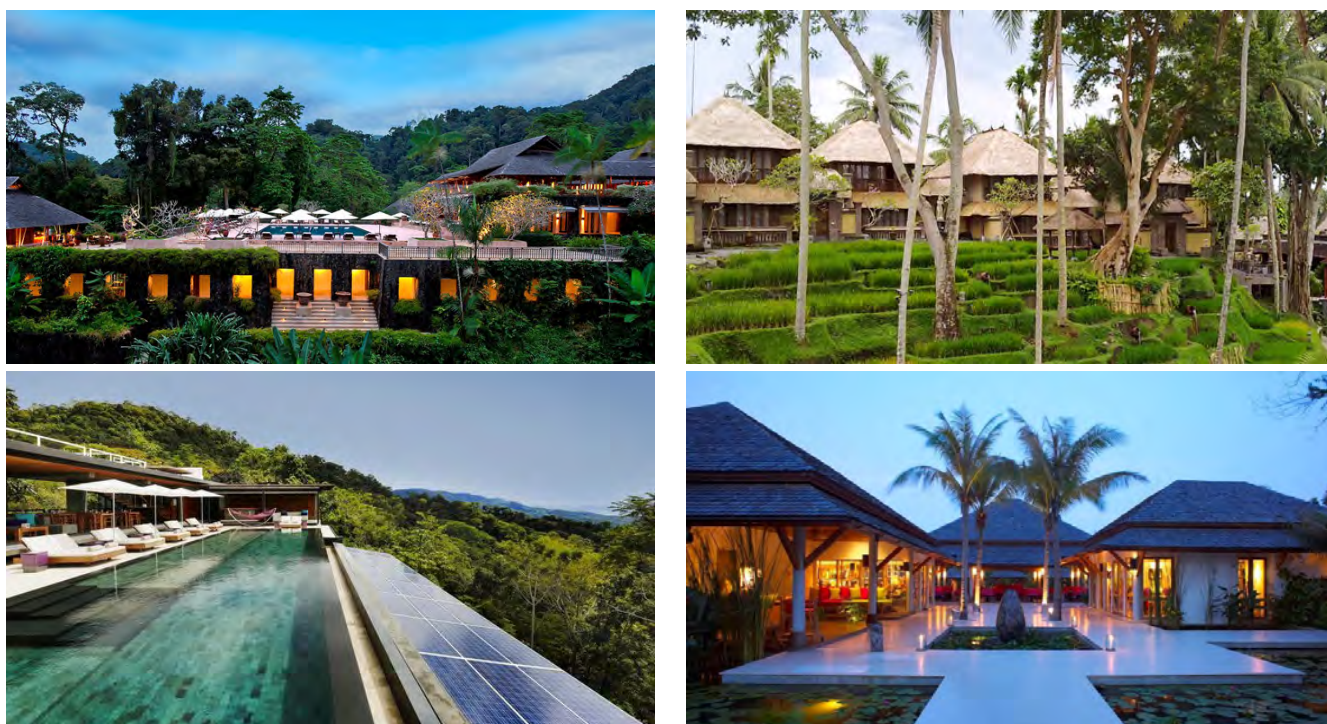
7.1.3. Larger Scale Accommodation Property with Conference Facilities and an Amphitheatre

The Blue Mountains has many smaller-scale accommodation operators (71% have less than 25 rooms). There is a need for another larger scale and possibly internationally branded property. In 2015, over 81% of visitors to the LGA were day trip visitors and 68% of visitor nights in the LGA were spent in private accommodation¹⁰⁴. Operators perceive a need to change the perception that the Blue Mountains is a day trip destination by encouraging branded operators to raise the profile, change perceptions and better meet market demand.

The reopening of the Hydro Majestic in 2014 demonstrated the pent-up demand for new and unique accommodation in the LGA. Rather than taking market share away from existing properties, the size of the overnight market has grown due to the Hydro's reopening.

Any hotel development introduced should be developed to blend in and complement the natural environment (Figure 46 and 47).

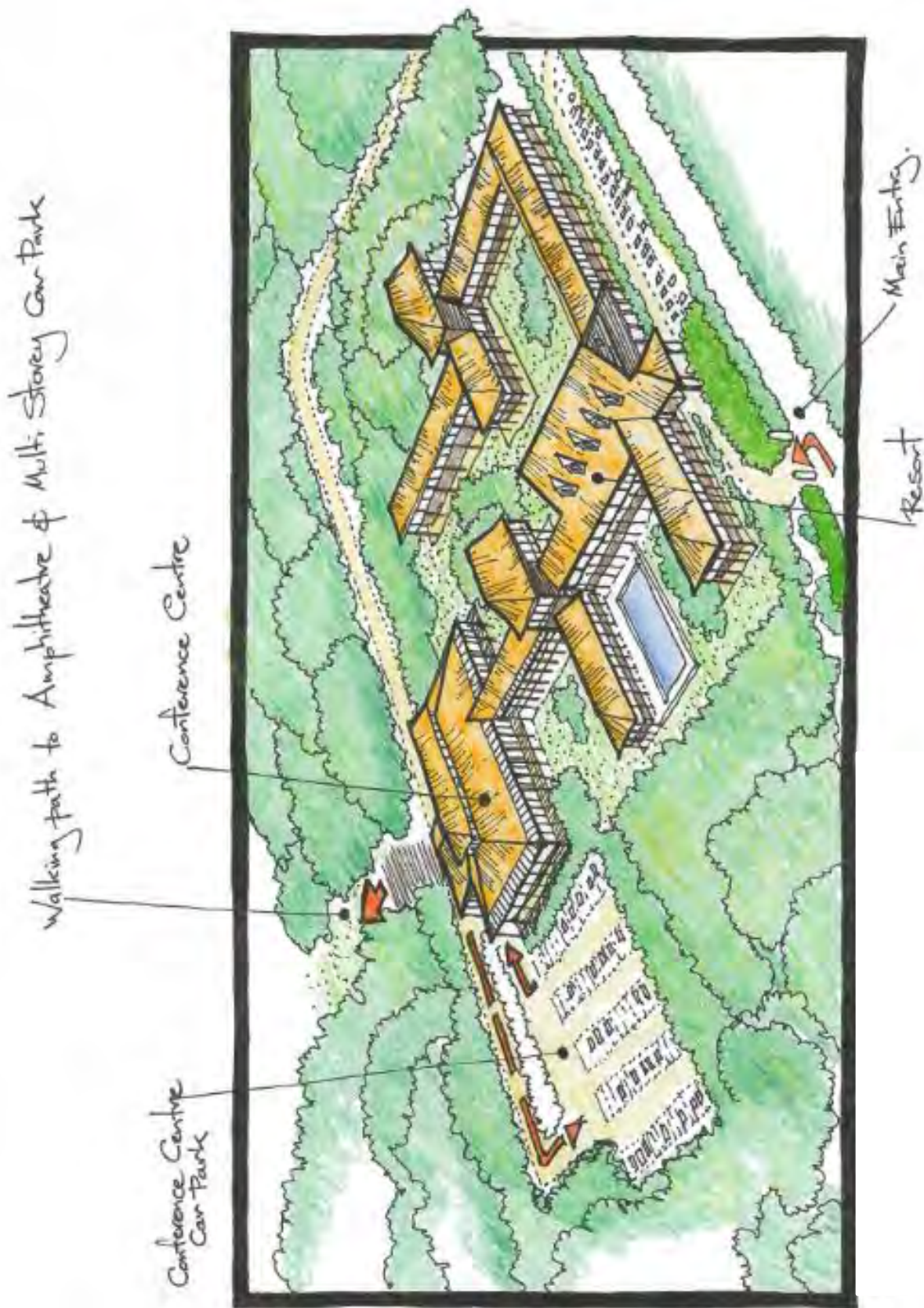
Figure 46: Sympathetic Development¹⁰⁵



¹⁰⁴ Based on a special data request to DNSW as well as a number of assumptions. See section 3.5.4 of this DMP for a detailed breakdown of how this was derived.

¹⁰⁵ The Datai, Langkawi; Kamandalu Resort & Spa, Ubud Bali; Kurà Design Villas, Costa Rica; and Six Senses Hideaway Hua Hin, Thailand.

Figure 47: Accommodation and Conference Centre Schematic



A larger scale hotel could provide a much-needed conference facility to cater for 650 – 850 patrons and events which currently cannot be attracted. Larger events, conventions and conferences are being turned away because of the lack of facilities.

Any new larger conference facility should ideally be available for use by all operators within the LGA.

The potential also exists to develop an outdoor amphitheatre (Figure 48) to hold concerts, plays and festivals etc. The amphitheatre would fill a gap in the outdoor entertainment/attraction market; the under 10s visitor market; the family market and the evening/entertainment market. Any such facility will need to have appropriate buffering from nearby residential areas.

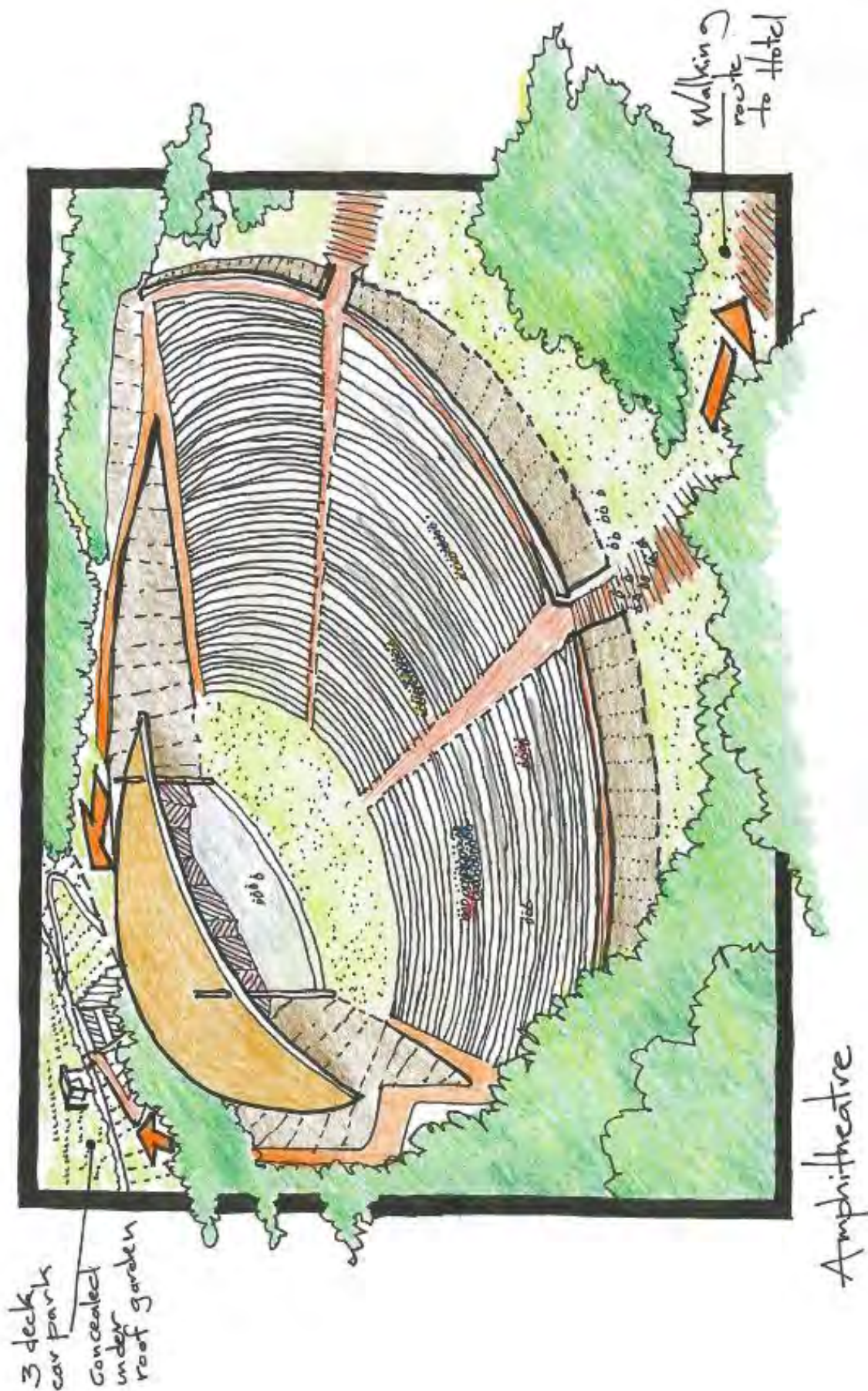
Figure 48: Outdoor Amphitheatre Examples¹⁰⁶



Figure 49 provides a schematic for an amphitheatre with capacity for up to 2,500 patrons. It reflects that a quality amphitheatre could potentially be well concealed through attractive surrounding vegetated buffer zones.

¹⁰⁶ Belvoir Homestead and Amphitheatre, Perth; Stanford Frost Amphitheatre, USA; the Cuthbert Amphitheatre, USA and Oak Point Park & Nature Preserve, USA

Figure 49: Amphitheatre Schematic



7.2. Attractions / Experiences

7.2.1. Bike Station Hire and Trails

Blue Mountain Bikes Australia, at Woodford in the mid mountains, is the only company that hires mountain bikes in the LGA.

With the lure of recreational activities and the distances between points of interest, potential exists to introduce bike share docking stations in Katoomba, Blackheath, Leura, Glenbrook, Wentworth Falls and Springwood (similar to those found in London¹⁰⁷ or Melbourne¹⁰⁸). Docking stations would allow visitors and residents to hire bikes throughout the LGA. They could also raise awareness of the many mountain biking trails such as the Anderson's or Woodford-Oaks Trails.

They could also be used to leverage new trails offering food, arts & culture and heritage experiences (Launceston and Hobart offer ARTBIKES: a bike borrowing service which takes participants on an easy access tour to the cities' galleries and museums (Figure 50) and Lithgow has planned a "Lithgow Valley Walking Track & Bike Trail" with bike hire). The opportunity may exist to establish a bike trail that follows convict and heritage roads such as The Botanists Way, the original Cox's Road and back roads.

Figure 50: ARTBIKES



7.2.2. Café/Dining for the Blue Mountains Theatre and Community Hub

The Blue Mountains Theatre and Community Hub at Springwood is an important community asset, providing a quality performing arts space, including a 430-seat theatre. Since opening in 2015, the Hub has sold over 25,000 tickets to performances, with 20% of tickets sold being to visitors¹⁰⁹.

There is scope to leverage off the Hub's success by introducing a café or pop-up dining facility. This would add a profit centre and add to the evening/attraction product in the LGA. It may also add to the vibrancy of the Hub's precinct and strengthen its regional appeal.

¹⁰⁷ London apparently has over 10,000 bikes stationed at more than 700 docking stations every 300-500m (<https://tfl.gov.uk/modes/cycling/santander-cycles/find-a-docking-station>)

¹⁰⁸ <http://www.melbournebikeshare.com.au/stationmap>

¹⁰⁹ Based on data provided by Council.

7.2.3. Cluster of Major Visitor Recreational Attractions

To encourage greater economic benefit to the LGA from tourism, more recreational experiences and attractions are needed. Mention has already made of developing a holiday park, conferencing facilities, larger scale accommodation facilities, an amphitheatre and eco-friendly in-park accommodation etc. In addition, a cluster of attractions to appeal to residents, the family market and the under 10-year-old market particularly, could be considered (Figure 51).

The cluster could include:

- a treetop canopy walkway and high ropes adventure course;
- a Sky Zone-style trampoline and recreation centre (an indoor, all-weather and evening attraction);
- a luge experience;
- a BMX track used for recreation, training and competitions; and
- an outdoor adventure playground including significant slides etc.

The development of these experiences would not only encourage people to stay longer and generate more demand for overnight stays but would also support Council strategies for providing: activities for residents, employment generation, healthy lifestyles and new business development.

Figure 51: Examples of Recreational Attractions¹¹⁰



¹¹⁰ Valley of the Giants, WA; South Yunderup, Perth, NZ; Thunderbird Park, Queensland; Sky Zone Trampoline Parks.

7.2.4. Evening Activities

There is a need to offer more evening activities to grow the domestic and international overnight visitor market. Council is developing a Katoomba Falls Night Walk and Lights Experience¹¹¹. The potential exists to complement the experience with:

- twilight concerts and cultural shows;
- dining experiences associated with shows/performances;
- evening walking tours (heritage tours etc.);
- summertime outdoor dining experiences; and
- food and wine events and night markets offering food stalls etc.

Figure 52: Evening Activities¹¹²



The Blue Mountains has been successful in facilitating events. Most have occurred during the day. Council is developing an events strategy which will include events that should stimulate the night-time economy. While the community may be uncomfortable at the notion of a strategy to create night-time entertainment, a careful and balanced approach should meet their concerns and ensure that the Blue Mountains is not perceived as a “closed shop” after 5 pm.

A mixed response was received on the potential for growth of the evening café culture in Katoomba, Leura and Lawson. Some stakeholders indicated there was growing supply of cafés and bars open in the evening. Others indicated that there was limited demand for this, other than on Saturday evenings. Operating costs including weekend and evening penalty rates were seen to be limitations on growth.

Consideration could be given to evening dining experiences during summer at locations such as Echo Point etc., assuming these high-profile locations can be used on an exclusive basis. Consideration should also be given to encouraging night-time dining and entertainment in tourism clusters to create synergistic results.

¹¹¹ To be completed 2017/18 as per feedback from Council.

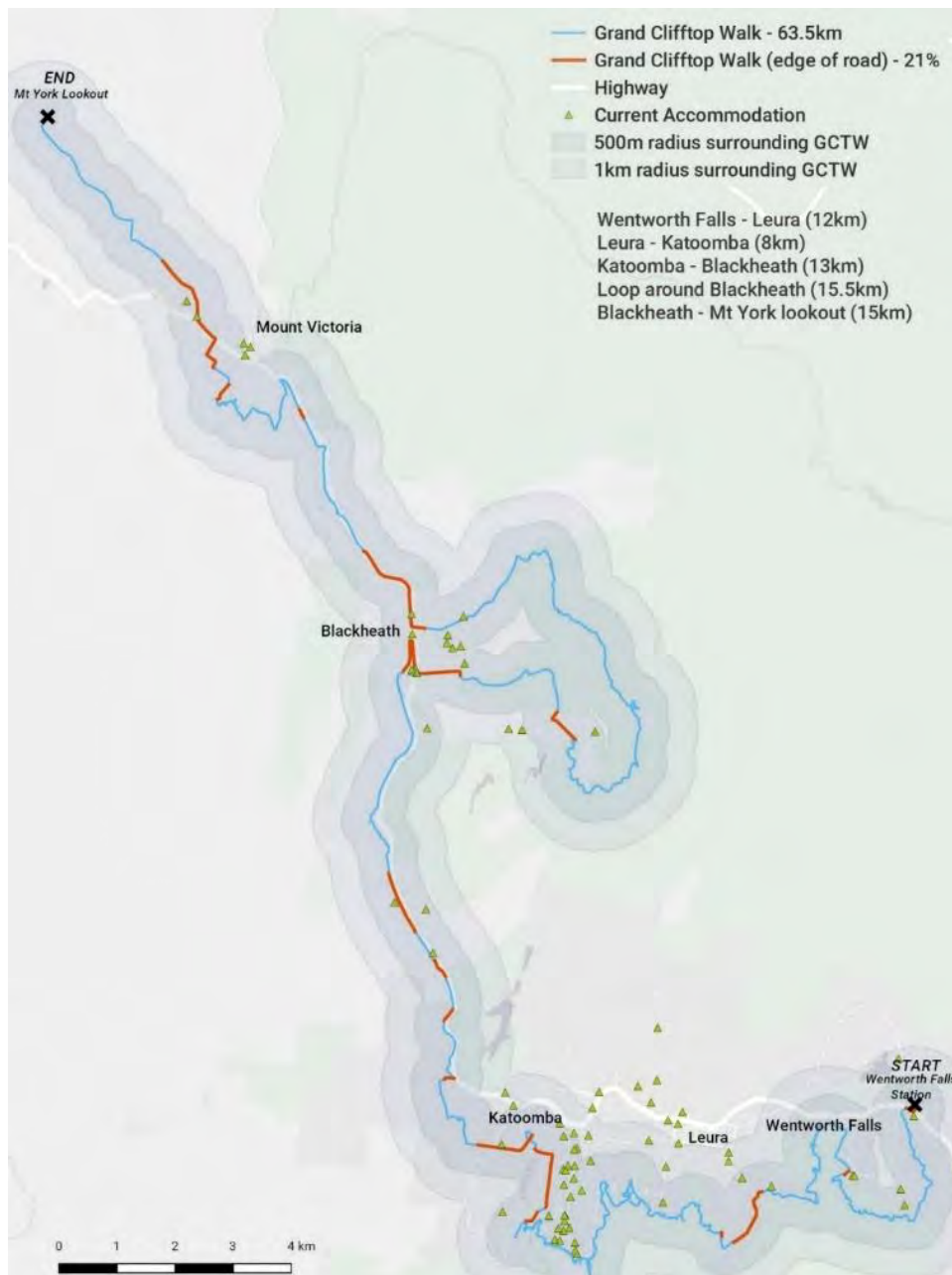
¹¹² Sounds of Silence, NT; Brisbane Night Noodle Markets; Thanksgiving Point Evening Summer Concerts, Salt Lake City and Port Arthur Ghost Tour, TAS.

7.2.5. Grand Clifftop Walk

Council has committed resources to developing the 63.5km GCTW¹¹³. The GCTW will pass through villages so visitors can access overnight accommodation and food and beverage services. As a series of half day and day excellent walking experiences, the GCTW has the potential to grow overnight visitor stays (this product should not be confused with an iconic Great Walk which contemplates a multi-day walk in the BMNP with in-park accommodation).

Approximately 21% of the GCTW traverses main roads and rail corridors (Figure 53). For the GCTW to become highly marketable, it should be segmented into half day and day components to avoid the necessity to have to walk along a main road or close to a rail corridor.

Figure 53: Grand Clifftop Walk



¹¹³ Of which 38km is apparently yet to be consolidated. Council estimates for the completion of the walk is approximately \$18m. This includes costs such as track and lookout upgrades, branding, signage and supporting infrastructure etc.

7.2.6. Greater Blue Mountains Trail

The GBMT is a path shared by walkers, runners and bike riders. The GBMT, eventually, is to link east to west across the Blue Mountains ridgeline and be accessible from all towns, villages and train stations. Council is keen to develop the GBMT as an almost fully “off road” trail to ensure riders/walkers/runners are not affected by vehicle movements. Currently, Katoomba to Blackheath has been completed and Blackheath to Mount Victoria is underway.¹¹⁴ The development of the GBMT is listed as a Priority 1 activity in the NSW Government’s Regional Trail Framework and Metro Green Grid.¹¹⁵

The potential exists to introduce product along the GBMT, including: tent/accommodation sites, seasonal food and beverage pop-ups, bike hire, commercial walking or cycling tours. Some portion of the profit from these operations could be reinvested in extending and maintaining the GBMT.

Government’s appetite for supporting trails where no commercial elements are included is diminishing. As the cost of maintaining trails is high, building in revenue generating opportunities to help offset some of these recurring costs is important.

7.2.7. Great Walk

The Blue Mountains offers excellent and well promoted half day and day walks. There remains, however, the opportunity to create a “Great Walk” in the LGA. To become a “great”, the walk will need to:

- offer views of the LGA’s best scenery;
- have tracks which are maintained to a high standard;
- have guided and semi-self-guided tours;
- have accommodation along the walk or within close proximity to it;
- have strict environmental guidelines regarding the use of tracks and the disposal of rubbish etc.;
- have clever marketing and promotion;
- be within a national park;
- have an easy-to-medium gradient for 80% of its length and a hard gradient for the balance of the walk;
- accommodate a guided group of between 10 – 20 participants;
- visit sites of significance not otherwise accessible;
- avoid roads/highways; and
- take no longer than 3 – 6 days (2 - 5 nights maximum) to complete.

New Zealand (a market leader for Great Walks¹¹⁶) has nine Great Walks. The jewel in the crown, and the most popular of the Great Walks, is the 53km Milford Track which travels through Fiordland National Park and the Te Wahipounamu WHS. This Great Walk is analysed in the best practice treks comparative analysis in this DMP (Section 5.4.1) to highlight critical success factors.

The target market for Great Walks is described at Figure 54. The market tends to be: high yielding, environmentally conscious, seeking an active experience, but not too adventurous, preferring to travel with guides and having comfortable accommodation.

¹¹⁴ As advised by Council.

¹¹⁵ As advised by Council.

¹¹⁶ Based on confidential industry advice



Figure 54: Target Market Identification for Great Walks in Australia¹¹⁷

DEMOGRAPHICS

- > 55% female 45% male
- > 50-59 year olds, followed by 60-69 then 40-49
- > average client: 51 year old female

PSYCHOGRAPHICS

- > city dwellers who enjoy the outdoors
- > urban professionals/self-funded retirees who are eco empathetic
- > higher than average disposable income and high yield

MARKET SIZE FOR MULTI-NIGHT GUIDED WALKS

- > 70,000 Australians walk overseas every year - at current yield that is a \$250m leakage to the economy
- > NSW is not represented with a Great Walk
- > NZ is the regional market leader - Milford traffic alone is larger than all of Australian Great Walks combined

BEHAVIOUR

- > Want to feel safe walking in nature with guides and fellow travellers
- > Love the beach and generally aware of their environmental footprint
- > Want to feel rejuvenated without too much hard work
- > Like novelty and premium brands
- > Have a sense of adventure and an active lifestyle
- > Enjoy outdoor experiences with creature comforts

GEOGRAPHICS

- > 33% NSW followed by 30% VIC then 16% QLD
- > 14% are international, predominantly UK/Europe, USA, Japan and noticeable increase in Chinese and Korean walkers

Research that was undertaken for the development of Great Walk experiences in Tasmania¹¹⁸ found:

- commercial bushwalkers¹¹⁹ tend to prefer 3-4 day walks, while independent bushwalkers¹²⁰ prefer 5 to 6 day walks;
- a high portion of commercial bushwalkers have very high incomes (\$150k+);
- commercial bushwalkers like creature comforts: no heavy rucksacks and good quality accommodation;
- commercial bushwalkers like to combine “other experiences” with their bushwalk: eco-boat cruises, helicopter rides and spa treatments etc;
- commercial bushwalkers avoid large groups, opting for the intimacy of smaller groups; and
- independent bushwalkers place a premium on experiencing the wilderness, a sense of escape, solitude and a challenge while commercial bushwalkers place a premium on experiencing wildlife and nature with creature comforts.

¹¹⁷ Based on confidential industry advice

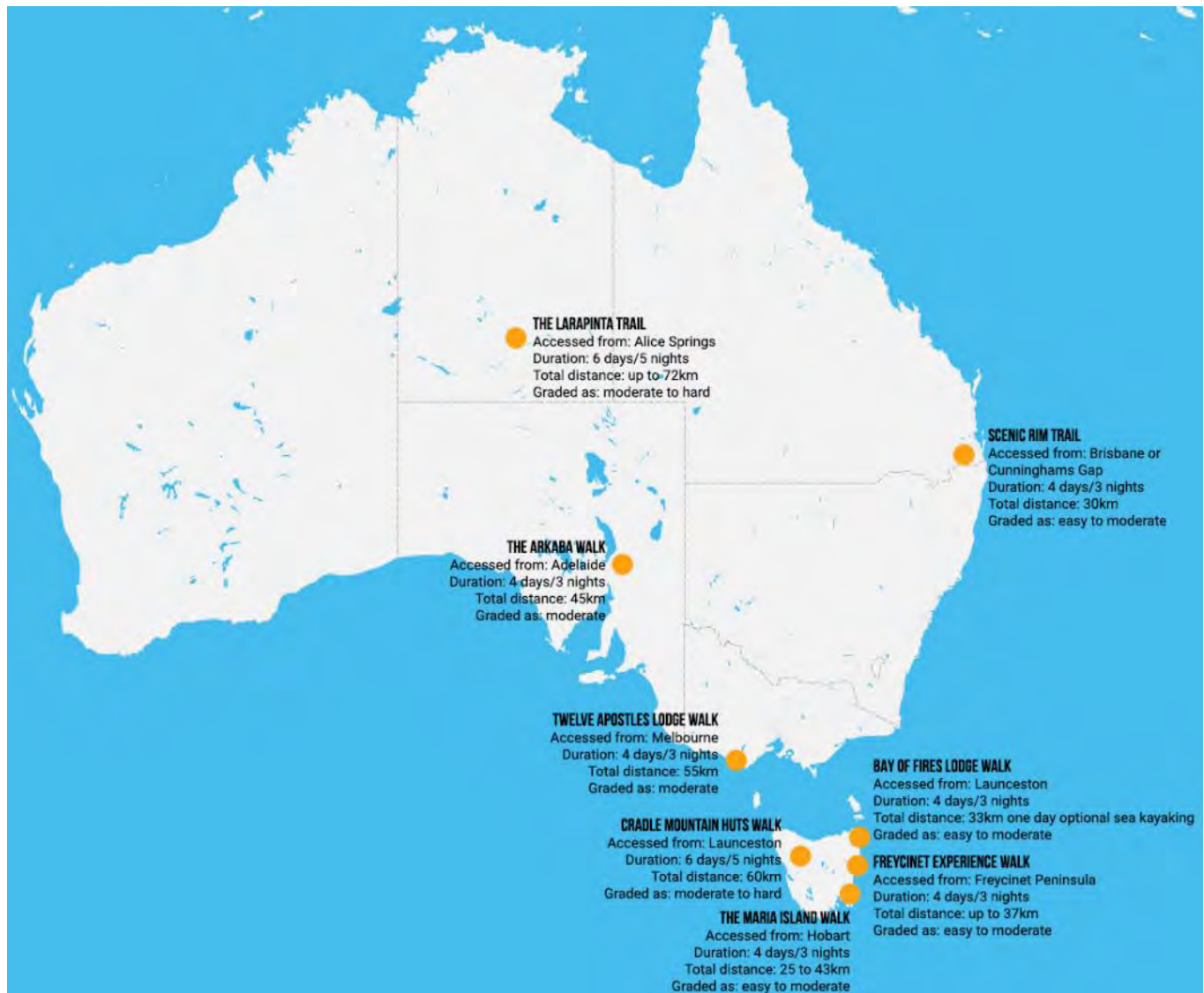
¹¹⁸ Based on confidential data provided by industry operators

¹¹⁹ Includes those undertaking a guided multi-day experience

¹²⁰ Includes those not undertaking a guided experience

Figure 55 locates walks marketed under the Great Walks of Australia (GWOA) brand. Each of these walks takes visitors through national parks and each offers accommodation including staying overnight within the national park¹²¹. There is no GWOA in NSW. Given the profile of the Blue Mountains as being one of Australia's "must visit" natural attractions¹²², its World Heritage status and its easy accessibility from Australia's primary international gateway, the development of a Great Walk seems like an obvious next step.

Figure 55: Great Walks of Australia¹²³



¹²¹ See Supporting Documentation 6 for a summary of the national parks and WHSs these walks travel through as well as the type of accommodation that is provided.

¹²² Though, not ranking as highly as attractions such as the Great Barrier Reef and Uluru, for example.

¹²³ <http://greatwalksofaustralia.com.au/>

Potential Great Walk trails and commercially guided short trails are listed at Section 7 of the Supporting Documentation. A matrix outlining the various possible great walk trails and an initial top line assessment is offered against a series of global best practice criteria. Further work however is required to refine these options, including a more detailed assessment of exactly where the various overnight stays could/should be located, how these would need to be controlled/managed, and the quality of the in-park experience which would be available, including any seasonal variances.

The particular and special rights and interests of the Traditional Owners, and the associated opportunities for cultural and economic benefit, including the potential for exclusive arrangements¹²⁴ in the use and presentation of Country, need to be a crucial consideration in the development of the Great walk.

The GCTW was also considered for its prospects as a Great Walk, particularly since Council has invested much promoting the Walk already. It was discounted, however, as it would have difficulty competing globally. Although some villages within the Blue Mountains are quaint, significant upgrades and investment would need to take place to improve streetscapes in order to compete with, for example, the Cinque Terre walk or the Camino De Santiago walk (Figure 56).

Figure 56: Cinque Terre and Camino De Santiago Village Examples



The next step in the development of a high yield Great Walk is the preparation of a feasibility study to identify qualitative (e.g. growing awareness of the environment and the historic and cultural importance of the Blue Mountains) and quantitative (e.g. employment growth and direct and indirect economic benefits etc.) benefits.

¹²⁴ As requested by Council

7.2.8. Govetts Leap Cantilevered Viewing Platform

Figure 57 provides comparison images of the lookout precincts at Govetts Leap and Echo Point. The views from each lookout are equally as stunning. There is, however, a marked difference in the quality of supporting infrastructure at each lookout. Govetts Leap is managed by the NPWS and Echo Point is a Council managed and developed precinct¹²⁵. Visitors do not differentiate between different site managers and would assume both sites are controlled similarly.

Figure 57: Govetts Leap and Echo Point Lookout Precincts



Govetts Leap Lookout Precinct



Echo Point Lookout Precinct

With Echo Point apparently reaching close to capacity during peak periods, potential exists, with careful planning and upgrades, to position Govetts Leap as a good alternative lookout to Echo Point. To do this, will require:

- a larger viewing platform, potentially cantilevered (Figure 58);
- a parking strategy to cater for periods of peak visitor demand;
- an upgrade and expansion of the toilet facilities; and
- an improved visitor information service.

Figure 58 provides examples of other cantilevered viewing platforms in natural areas which often develop into experiences in their own right.

Figure 58: Best Practice Cantilevered Viewing Platforms¹²⁶



¹²⁵ Beyond the lookout is NPWS managed.

¹²⁶ Top of Tyrol, Mount Isidor, Austria; Five fingers viewing platform, Krippenstein, Austria; Il Binocolo, Merano, Italy; and Bruxner Flora Reserve, Coffs Harbour.



7.2.9. Katoomba Falls Night Walk and Lights Experience Path Extension

The Katoomba Falls Night Walk it is not well known¹²⁷. Potential exists to enhance and increase the profile of the Night Walk. Council is upgrading the Walk with a completion timeframe of 2017/18. The upgrades include a 1.1km night lit walk through gullies and across the escarpment. The landscape lighting of the gullies, falls and escarpments will include white, multi-spectrum colour or projected lighting.

Although not included within the current upgrade schedule, the potential exists to introduce a 250m extension of path lighting through to Scenic World. This would support extended trading hours and evening activities at Scenic World.

7.2.10. Knapsack Reserve Trails Hub

Knapsack Reserve at Glenbrook in the lower mountains, has a number of walking and biking trails. The Reserve is situated within Council's Scenic Eastern Escarpment precinct¹²⁸ and includes the first sanctioned and purpose built downhill track in the Blue Mountains (cyclists only) as well as a number of cross country single biking tracks (shared walking/cycling trails). These tracks cater to riders from the Sydney market. Council has invested significantly in the development and upkeep of the tracks. The potential exists to introduce a central mountain bike hub to be used for recreational biking and events, including biking events, orienteering competitions, trail and cross country running events etc. The hub could include:

- a small-scale pop-up shop selling and hiring mountain bikes and related equipment/gear;
- a pop-up café to operate during peak periods and for events;
- an information facility to provide information on tracks at Knapsack Reserve and in the Blue Mountains generally;
- a bike repair/maintenance facility;
- toilets and related amenities;
- a gold coin or similar bike wash facility; and
- upgraded parking facilities.

The hub could also incorporate a commercial operator to provide mountain bike lessons, training courses and guided tours.

¹²⁷ As advised by Council

¹²⁸ Masterplanning for this precinct is currently underway

A feasibility assessment of the proposal to extend the mountain bike track network at Knapsack Reserve should be undertaken. There is an estimated 7.8km of tracks. Research has indicated that 20 – 30km of tracks are generally required at mountain bike circuits to avoid ride repetition¹²⁹.

Figure 59: Examples of Bike Hubs/Centres¹³⁰



The mountain bike market is a good yielding market, with data¹³¹ suggesting:

- mountain biking is one of the world's fastest growing recreational, sport and tourism activities;
- riders have a mid to high-income average;
- riders spend, on average, \$3k - \$4k per mountain bike, with more than 70% of mountain bike riders owning two or more bikes;
- enthusiasts ride frequently (2-3 times per week), and, where there is trail diversity, more often;
- riders average 2-3 hours per ride;
- 60% of those surveyed travel interstate annually to ride;
- an additional 8% travel interstate more than three times per year; and
- 34% of those surveyed travel overseas annually to ride: New Zealand is a popular destination.

With good tracks and supporting facilities, the Blue Mountains may capture a larger share of the higher yielding mountain bike niche market. It will help position the LGA as a nature-based recreational getaway. The development of new tracks will also assist in reducing the level of unsanctioned trail usage by mountain bike riders. This will help to: protect sensitive landscapes; reduce conflict with other land uses and decrease risk and liability for landowners and managers.

Knapsack Reserve is being considered in the master planning exercise for the Eastern Escarpment Precinct. Potential exists to incorporate the Hub recommendations into the planning exercise.

¹²⁹ DirtArt is a mountain bike trail design firm. In a report released the mountain bike profile, it highlights that riders typically average a speed of approximately 10km/h, requiring 20 - 30km of trail to avoid ride repetition (https://www.bicyclenetwork.com.au/media/vanilla_content/files/MTB%20Market%20Profile%20PP-%20Dirt%20Art.pdf)

¹³⁰ Swinnerton Cycles Forest Centre at Cannock Chase Forest Mountain Biking Trails, UK; and Dalby Bike Barn and Café at Dalby Forest, UK.

¹³¹ https://www.bicyclenetwork.com.au/media/vanilla_content/files/MTB%20Market%20Profile%20PP-%20Dirt%20Art.pdf (based on a survey of 2,844 mountain bikers) and http://wamba.org.au/docs/Western_Australian_Mountain_Bike_Strategy_2015-2020.pdf



7.2.11. Leura Cascades Upgrades

Leura Cascades is a popular picnic spot, viewing area and starting point for a number of walking tracks. Council is looking to introduce upgrades to the Cascades from 2019/20, including:

- the reestablishment of a night lit walkway;
- three new lookout platforms (Elysian East, West and Olympian Lookouts), one which will be cantilevered;
- an upgrade of the Solitary Restaurant; and
- new amenities facilities.

7.2.12. Megalong Valley Agri-tourism

Megalong Valley offers a unique agricultural and associated tourism/recreational environment with a product base centred on farm gate experiences; cellar door experiences; small scale cottage and chalet accommodation options; tea rooms and smaller cafés; walking tracks and horse trails etc.

To grow agri-tourism to the Megalong Valley, there is a need to address various challenges, including the need:

- for better-maintained access roads and tracks;
- for improved directional signage on trails and roads;
- for accurate cadastral and other maps;
- to address the presence of feral animals;
- for accommodation providers with 4 – 10 units (smaller providers will struggle to generate commercial returns);
- to support sustainable agri-tourism activities (where they create local employment and support initiatives such as slow food production); and
- for farmers' markets catering to residents and visitors.

With the production of good quality rieslings, rosé, shiraz and aromatic wine, cellar door experiences and food and wine trails (walking, cycling and potentially on horseback) should be investigated.

7.2.13. Mini “Vivid” Experience

Given the success of the 2015 Culturescape event held at The Carrington Hotel, potential exists to expand the event to run the length of the main street of Katoomba and in other villages. The Culturescape event ran for one night in October and attracted some 2,000 people. An evening street market and the upgraded Katoomba Falls Night Walk¹³² could leverage off the light show.

Figure 60: The Carrington Culturescape Event



¹³² Due for completion 2017/18 (based on feedback provided by Council).

7.2.16. Trails (Antiques/Bric-a-Brac)

There are a number of antique and bric-a-brac stores scattered throughout the LGA. An antiques/bric-a-brac trail could be developed to link stores in the lower, mid and upper mountains.

Once developed and marketed, this could also link with an antiques event/show. In addition, the RSA might offer this as a regional marketing initiative assuming the other LGAs have complementary product.

7.2.17. Upgrades to Blue Mountains Heritage Centre

There is a need to ensure that the visitor centre at Govetts Leap (Blue Mountains Heritage Centre), which is an important touch point for information for visitors to the Blue Mountains, is of a similar standard to the VIC at Echo Point. This will assist in spreading the load of visitors across peak period through marketing Govetts Leap as an equally important experience to Echo Point.

While the BMCC has a pay-for World Heritage Exhibition, this is situated in Katoomba town centre and not in or on the fringe of the GBMA or the BMNP.

Furthermore, Echo Point VIC will be undergoing upgrades¹³⁸ under the National Stronger Regions Fund grant program and as part of Council's Scenic Southern Escarpment¹³⁹ tourism precinct planning. As the quality of the experience will be further improved, this places a greater expectation on the need for the BMHC to offer a comparable level of quality.

As indicated in Section 7.1.2, out of five selected NPWS visitor centres in the Blue Mountains and the NSW north and south coast, the BMHC received the lowest visitation.¹⁴⁰ However, total visitation to the Blue Mountains LGA was greater than total visitation to these other destinations. The BMHC is, therefore, capturing a far smaller percentage of visitation than these other NPWS visitor centres. Given the significance of the Blue Mountains, with its World Heritage status, there is a need to encourage a greater number of visitors to experience the BMHC and the fascinating fauna, flora and social history stories it is able to offer.

Visitation data for the Blue Mountains Heritage Centre is shown in the table below.

Table 21: Visitation to NPWS Blue Mountains Heritage Centre, 2005/06 – 2014/15¹⁴¹

Year	Visitors	Year	Visitors
2005/06	70,946	2010/11	61,085
2006/07	68,013	2011/12	58,356
2007/08	67,092	2012/13	64,303
2008/09	64,420	2013/14	58,216
2009/10	59,100	2014/15	66,030

The BMHC is an attractive building which contains a plethora of interesting historical information and artefacts (Figure 62). The information and artefacts could be showcased to a greater extent if enhancements were undertaken to make the facility more interactive especially for younger visitor markets.

¹³⁸ Having received a \$2.6m grant (based on the NSRF Southern Scenic Escarpment Grant document).

¹³⁹ Comprising the areas of Wentworth Falls, Leura and Katoomba (Jamison and Kedumba Valleys).

¹⁴⁰ Based on 2011 comparative data.

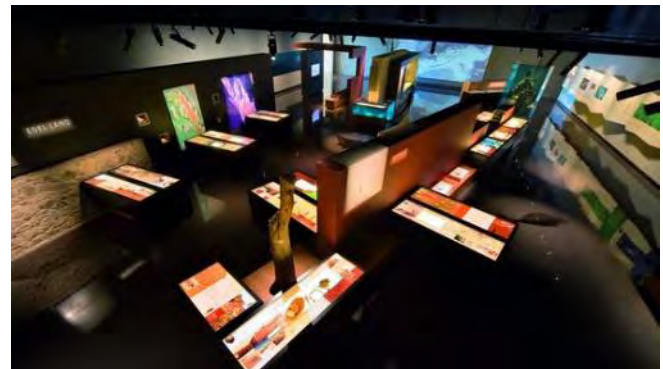
¹⁴¹ Special data request to NPWS.

Figure 62: Current Interpretation in the BMHC



Some examples of best practice VICs which showcase other WHSs are shown in Figure 63. This demonstrates the high quality of visitor centres which are a reflection of the WHSs they represent and the importance and value placed on supporting infrastructure.

Figure 63: BMHC Compared with Other World Heritage Sites Information Centres¹⁴²



¹⁴² Blue Mountains Heritage Centre, NSW; Uluru-Kata Tjuta Cultural Centre, NT; Shark Bay World Heritage Discovery and Visitor Centre, WA; Shark Bay World Heritage Discovery and Visitor Centre, WA; Bowali VIC (Kakadu National Park, NT); Canyon Rim Information Centre, Grand Canyon, USA;

The NPWS is preparing to make a number of upgrades to the BMHC including introducing new retail and interpretative displays, introducing a technology hub and a Wilderquest area for kids as well as cosmetic upgrades (painting, carpets etc.). Any upgrades need to deliver a highly interactive experience. Examples of interactive experiences include:

- Interactive Floors: Interactive floors (Figure 64) could simulate the Australian bush/national park environment;
- Touchscreen Tables: These tables can either be projected upon or be a touch screen (Figure 64). Touch tables create social interaction between users and are a platform for lively learning and entertainment. The tables could tell a range of stories such as the history of the BMNP and WHA and descriptions on the flora and fauna that live within.
- Interactive Walls: Walls can be customised to feature different scenarios (Figure 64).
- An Audio/Visual Experience: Introduction of an interactive audio-visual experience could take visitors on a fly through journey throughout the BMNP.

Figure 64: Best Practice Interactive Floors, Tables and Walls



7.2.18. Wentworth Falls Lake Upgrades

Wentworth Falls Lake was built in 1878 to supply water for steam trains prior to the railway being electrified.¹⁴³ Today, the Lake is used as a recreational facility by residents and visitors. There are electric barbeques, children's play equipment, picnic areas, a walking trail and non-motorised boating is permitted on the Lake.

Figure 65: Wentworth Falls Lake Precinct¹⁴⁴



Under the auspices of the National Stronger Regions Fund, Council will complete an upgrade to the Lake¹⁴⁵. It will provide a path/boardwalk (which will include a viewing platform (Figure 66)), a new car park including coach parking (for 2 full sized and 1 smaller bus) as well as centrally located toilet amenities, with a completion date of 2018/19 (Figure 67). The additional toilet amenities will not only cater for Lake users but for tourist coaches: it will provide an alternate toilet stop for tourist buses to ease the load on Leura.

Figure 66: Accessible Boardwalk at Western End of Wentworth Falls Lake Concept¹⁴⁶



¹⁴³ <http://www.bluemountainsfishing.net/lakes/no-power-boats/wentworth-falls-lake/>

¹⁴⁴ Six Maps - <https://maps.six.nsw.gov.au/>

¹⁴⁵ Total project cost is estimated at \$1.3m – 50% of this will be funded via Council and 50% via Federal Government (under the NSRF program)

¹⁴⁶ Wentworth Falls Design and Cost Grant Application

Figure 67: Wentworth Falls Lake Precinct Plan Upgrades¹⁴⁷



Other enhancements to the Lake and its surroundings could include:

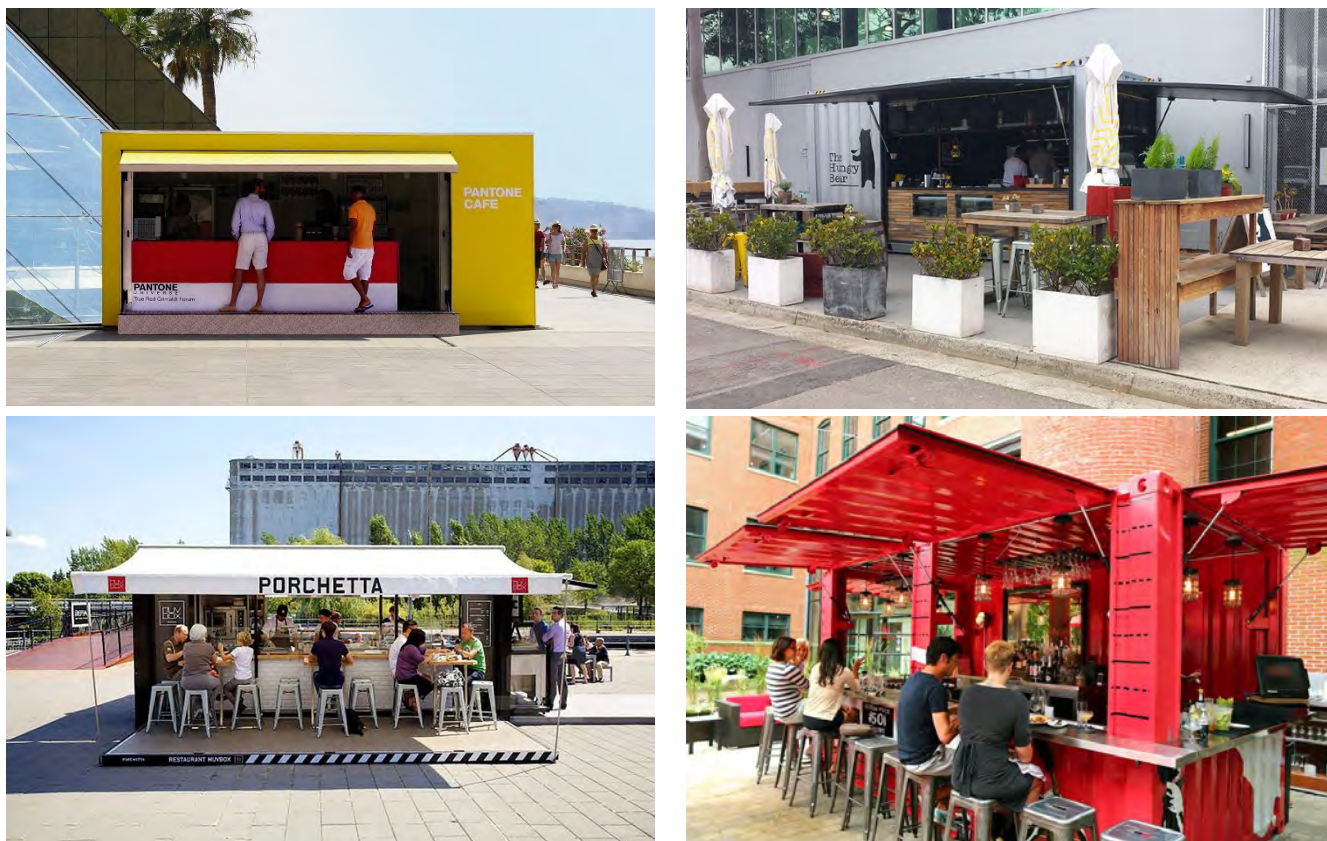
- offering seasonal recreational equipment for hire, including paddle boats, stand up paddleboards, kayaks and canoes etc;
- introducing a seasonal pop-up café to operate during peak periods only; and
- developing a range of “on lake” play equipment such as floating decks, floating trampolines and inflatable slides etc. (some of these could be seasonal or permanent and would complement the recreational nature of the Lake and Council’s investment in nearby land play equipment).

¹⁴⁷ Wentworth Falls Design and Cost Grant Application

These additional enhancements will cater to the family market, the under 10 aged market particularly and will offer new recreational facilities to support local community needs.

Any café, which could operate on a seasonal basis, does not need to be a permanent structure but – rather – could be a pop-up design which can be closed down or relocated to another location during the winter/off season (Figure 68).

Figure 68: Pop-up Café Examples¹⁴⁸



¹⁴⁸ Pantone Café, Monaco; The Hungry Bear Café, Lidcombe, Sydney; Porchetta, Montreal; and Cinquecento, Boston.

7.3. Destination Awareness, Branding and Visitor Information Services

7.3.1. Blue Mountains Destination Brand

The Blue Mountains is generally perceived as a well-known destination by domestic and international visitors. However, stakeholders considered that the Blue Mountains brand could be better framed to inform visitors about what is on offer, other than the Three Sisters.

Section 8 of the Supporting Documentation provides a summary of how the Blue Mountains “ranks” as a tourism destination, based on Google searches of “Top things to do in Australia”, “Australian Destinations” etc. and searches of key tourism-based websites. The results demonstrate the following.

- CNN Travel – “10 Natural Wonders of Australia” list¹⁴⁹: The Blue Mountains is ranked #9 on this list, with other WHA being listed above it, such as the Great Barrier Reef, Uluru, Shark Bay and Kakadu.
- Australian Landmarks.com – “Top 10 Australian Landmarks” list¹⁵⁰: The Blue Mountains, or more specifically, the Three Sisters, did not make the Top 10 list. Uluru, The Great Barrier Reef and Kakadu do appear on this list. The Three Sisters do, however, appear on the more specific “Top 10 Australian Landforms” list, ranking #6 after Uluru, Heart Reef, the Bungle Bungles, Cradle Mountain and the Daintree Rainforest.
- Escape.com.au – “Top 10 Aussie Bucket-List Destinations” list¹⁵¹: The Blue Mountains does not feature on this list while Uluru, the Great Barrier Reef and The Kimberley region take out the top three places. This ranking was based on a survey of 4,100 Australians regarding “bucket list places” respondents intend to visit one day. The Blue Mountains not being featured on this list could be due to its easy accessibility and the fact that a large number of Australians may have already visited the WHS.
- Google – Top Australian Destinations¹⁵²: When the query “top Australian destinations” is performed on Google, a total of 48 destinations/attractions appear, however, the Blue Mountains does not feature among them. Other WHSs such as Kakadu National Park, areas in the Great Barrier Reef and Cradle Mountain are, however, listed.
- Lonely Planet – “Ultimate Travel List (Worldwide)”¹⁵³ – This worldwide ultimate travel lists ranks the Great Barrier Reef as the #2 destination to visit globally (after Angkor Wat, Cambodia). Whilst the Blue Mountains does appear on this list, it is ranked #202, after, illustratively, the Twelve Apostles (#12), Cradle Mountain (#32), Uluru (#33) and Kakadu National Park (#56).

These results demonstrate that the profile of the Blue Mountains, as one of Australia’s leading natural attractors and UNESCO WHSs, appears to be much lower than many might have envisaged. It may be that the results reflect the easy accessibility of the Blue Mountains (being close to a major international gateway), which, whilst being a significant benefit for the area, can also create a perception that the experience is not as “special” as visiting some other icons (such as Uluru and Cradle Mountain) that are situated further away and that fewer people get to travel to in their lifetime. But it may also reflect a perception that unlike Cradle Mountain, for example, one can only do half day and day tours into the WHS and the urban environment generally is more suburban than unique.

Operators commented that since the demise of the regional tourism organisation (RTO) for the Blue Mountains¹⁵⁴, they have struggled to market themselves effectively and are unsure of what the current destination positioning is for the area. BMATA, the

¹⁴⁹ <http://travel.cnn.com/sydney/visit/10-natural-wonders-australia-834214/>

¹⁵⁰ <http://www.australianlandmarks.com.au/lists/australian-landmarks-top-10-list>

¹⁵¹ Based on a survey for 4,100 Australians

<http://www.escape.com.au/australia/top-10-aussie-bucketlist-destinations/news-story/05253cd21c26ae3985ca1979a6765ec3>

¹⁵² <https://www.google.com.au/search?q=top+australian+destinations>

¹⁵³ <https://www.lonelyplanet.com/ultimate-travel>

¹⁵⁴ The former RTO was BMLot – Blue Mountains, Lithgow and Oberon Tourism

Blue Mountains' local tourism organisation (LTO), has aimed to pick up many functions which the RTO (which was a body funded by State Government as well as the councils involved) used to complete. This has involved significant effort from those involved in the volunteer-run Association.

Industry also commented that the upgrade of the Great Western Highway has been a "double-edged sword". While it has improved access and allowed more people to visit, it has also created the perception that the Blue Mountains is simply a day trip destination. Industry considers the destination branding needs to encourage a longer length of stay and actively promote overnight stays.

Industry and Council need to engage a reputable brand/marketing agency with experience in developing globally significant brands to determine a destination brand for the Blue Mountains LGA, which could potentially extend to being a brand used for the GBMA. While there is no need to create a new destination name (as the Blue Mountains has considerable consumer awareness), there are other brand components which should be investigated, including:

- a tagline which showcases, in a few words, what makes the Blue Mountains unique;
- a logo which features the Blue Mountains brand and the tagline (if developed): the logo should be consumer focused and leverage off the destination's attributes and the direction which industry, Council and the community wish to pursue;
- a colour palette for the new brand which can be used on the destination website, app and all marketing collateral etc;
- brand collateral which industry can use, such as link-back logos for websites etc; and
- an overview of the target markets the brand is aiming to capture and what industry can do to promote to these markets.

The potential also exists to leverage off the positioning developed for the Greater Blue Mountains as part of Australian National Landscapes Program¹⁵⁵. As part of the Program, a guidebook was developed for the Greater Blue Mountains which focused on landscape positioning. The purpose of the guidebook, which was developed for anyone who "shares a common interest in [the Blue Mountains] landscape"¹⁵⁶, was to provide ideas and inspiration to help deliver the best experiences for visitors to the Blue Mountains.¹⁵⁷ In the guidebook, the positioning identified for the Blue Mountains is as follows:

*The Greater Blue Mountains is a place of extraordinary wild beauty, where the blue haze of World Heritage-listed eucalypts is splashed across the golden sandstone. It is an ancient land of 350 million-year-old cave systems, serpentine slot canyons and the prehistoric Wollemi pine. Traditional country of six Aboriginal language groups and Australia's cradle of conservation and bushwalking, this accessible wilderness is on Sydney's doorstep but feels a world away.*¹⁵⁸

Whilst care is needed to protect and promote the World Heritage nature of the area, the Blue Mountains is much more than just the "in-park experience". A reconstituted brand and/or positioning statement needs, therefore, to also focus on:

- the number of villages and communities which make up the area;
- the culture, arts, sporting and recreational elements which constitute its attractiveness and liveability;
- the fact that the area is so easily accessible from Sydney but offers a unique topography and climatic experience; and
- that when combined with Hawkesbury and Penrith LGAs, it is able to offer a wide range of food trails and adventure experiences.

¹⁵⁵ Developed by Tourism Australia and the Director of National Parks

¹⁵⁶ Greater Blue Mountains – A guide book to making the most of your Landscape Positioning, Australian Government – Director of National Parks and Tourism Australia, page 2.

¹⁵⁷ Ibid

¹⁵⁸ Ibid, page 11.

7.3.2. Blue Mountains Trails App

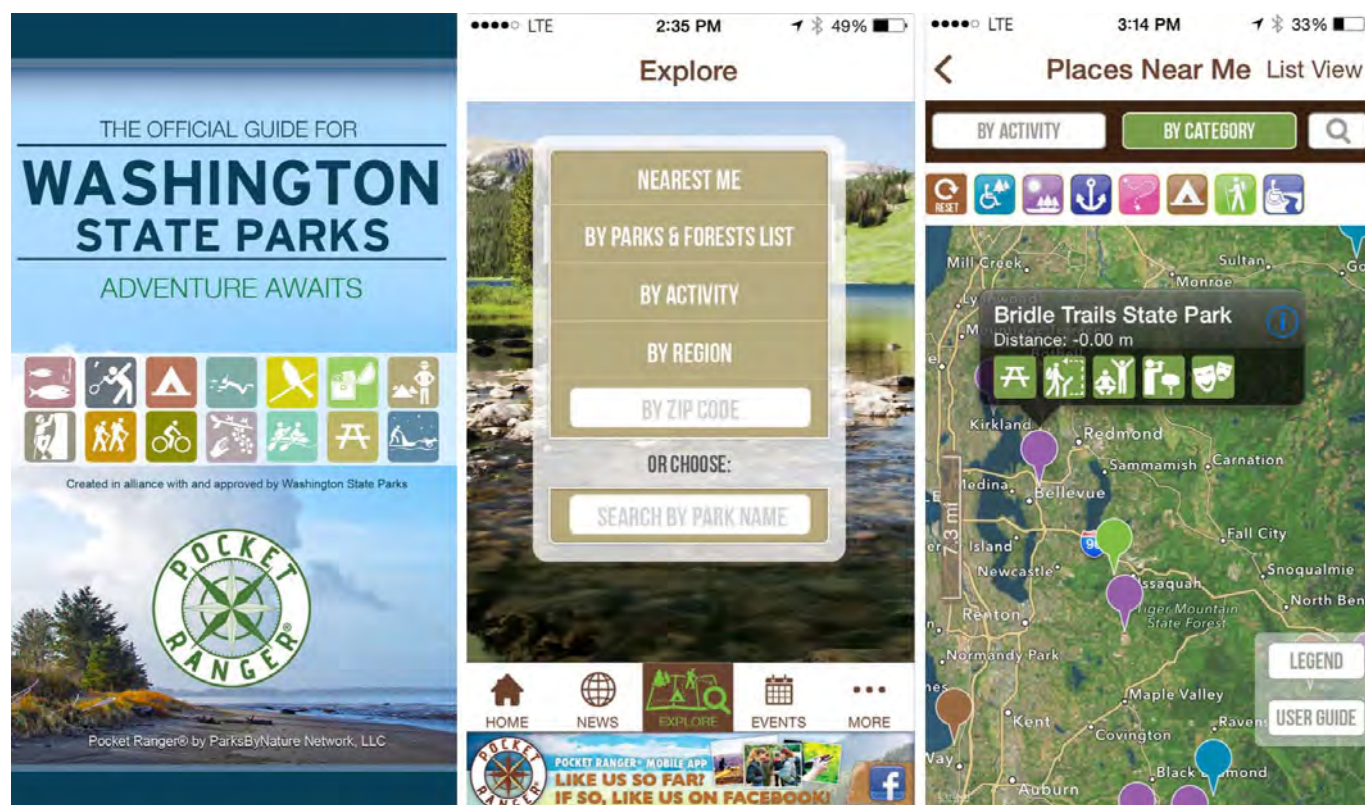
While the Blue Mountains has a plethora of Council-managed and NPWS walking and cycling trails, there is a lack of easy to source and reliable information on these trails: how to access them, the difficulty of the trail and the conditions of the trails etc.

The potential exists to introduce an app which provides residents and visitors with this information. Figure 69 provides images from a best practice walking trail app, Pocket Ranger, which was developed for Washington State Parks. The app provides:

- track/trail information including mode (hiking, walking, cycling, horseback riding etc.), description, distance, accessibility and weather conditions;
- current alerts for each trail;
- photo galleries for each of the trails;
- information on events occurring throughout the Washington State Parks network;
- an alert button which, when pressed, sends for assistance; and
- links to other apps, such as Pocket Ranger Bird Feed, which is a sharing app for bird watchers.

The app offers the ability for users to make online reservations for each park/trail. By way of example, users can book camping, RV, cabin, yurt and vacation houses. The app also provides a telephone link to book other commercial activities such as tours.

Figure 69: Best Practice Walking Trail App - Pocket Ranger (Washington State Parks)



7.3.3. Destination Website

The primary destination website for the Blue Mountains is www.visitbluemountains.com.au. The site is managed by BMATA and operators must be a member of BMATA to be listed on the site. There is a plethora of other destination and attraction-based websites which promote the Blue Mountains¹⁵⁹, including for niche tourism sectors such as arts and heritage.

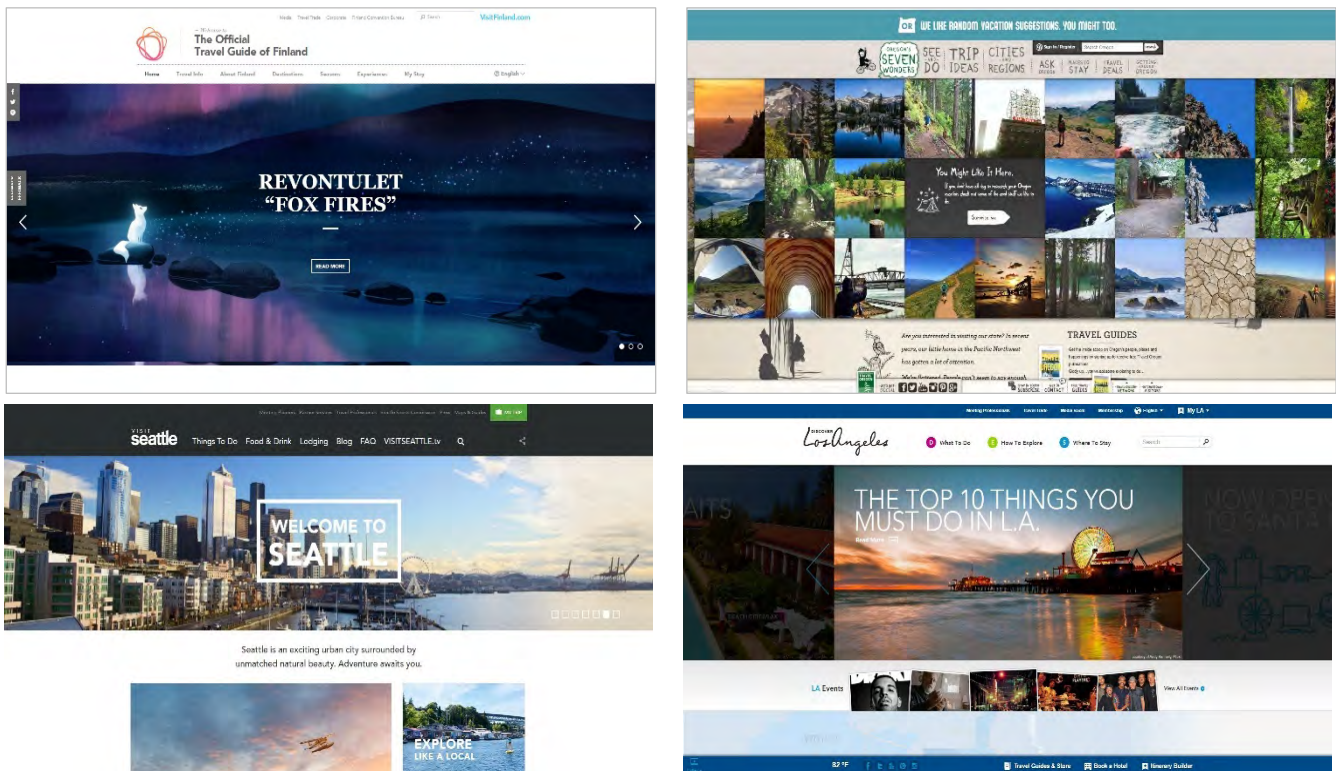
Operators see the need for one website which uses the new comprehensive brand. They suggested that Council should manage the website, in partnership with industry (via BMATA) as Council will represent the industry at large while BMATA will represent its members only.

The website/user interface should be carefully designed to reflect and showcase:

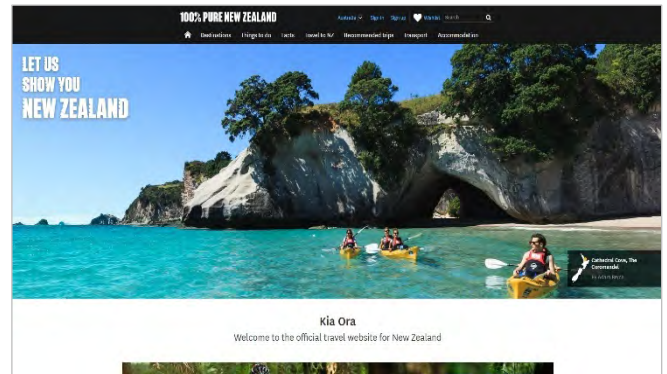
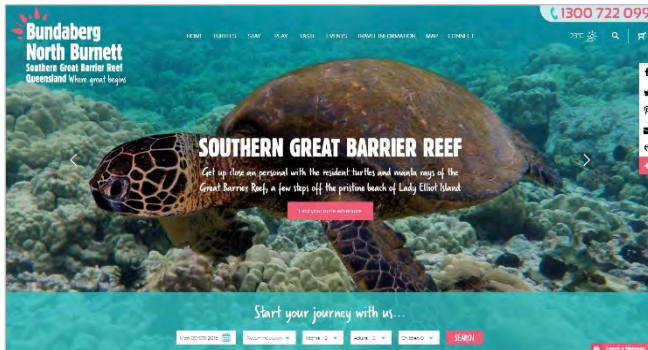
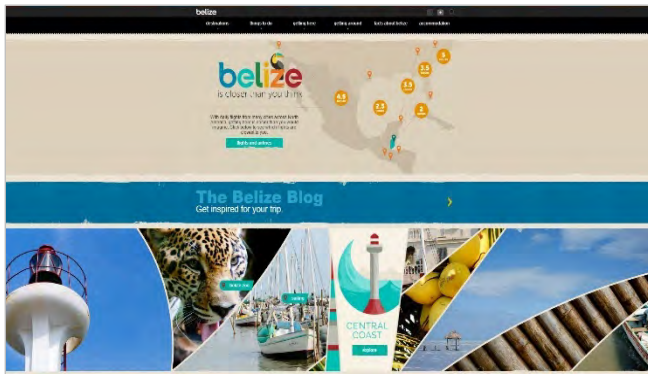
- the World Heritage status of the Blue Mountains;
- iconic experiences in the area;
- the nature-based experiences, walking tracks (both Council and NPWS managed), mountain biking tracks and lookouts; and
- major events and festivals.

Figure 70 provides examples of best practice destination websites.

Figure 70: Examples of Best Practice Destination Websites User Interfaces



¹⁵⁹ Examples: <http://www.bluemountainscitytourism.com.au/>; <http://bmata.com.au/>; <http://www.getinnow.com.au/>; <http://bluemountainsattractions.com.au/>; <http://www.greaterbluemountainsdrive.com.au/>; <http://www.visitnsw.com/destinations/blue-mountains>; <http://www.sydney.com/things-to-do/family-holidays/day-trips/blue-mountains>; <http://www.bluemts.com.au/>.



The new website should also feature an up-to-date and robust events calendar. It should be developed to provide visitors with the ability to see what is on and to book events but also to enable industry to better plan dates and avoid clashes.

Dubai's tourism calendar (Figure 71) has a useful feature which enables users to download the events calendar widget and post this on their own websites. This widget pulls data from the official Dubai tourism website and ensures the events calendar widget is always up-to-date.

Figure 71: Events Calendars

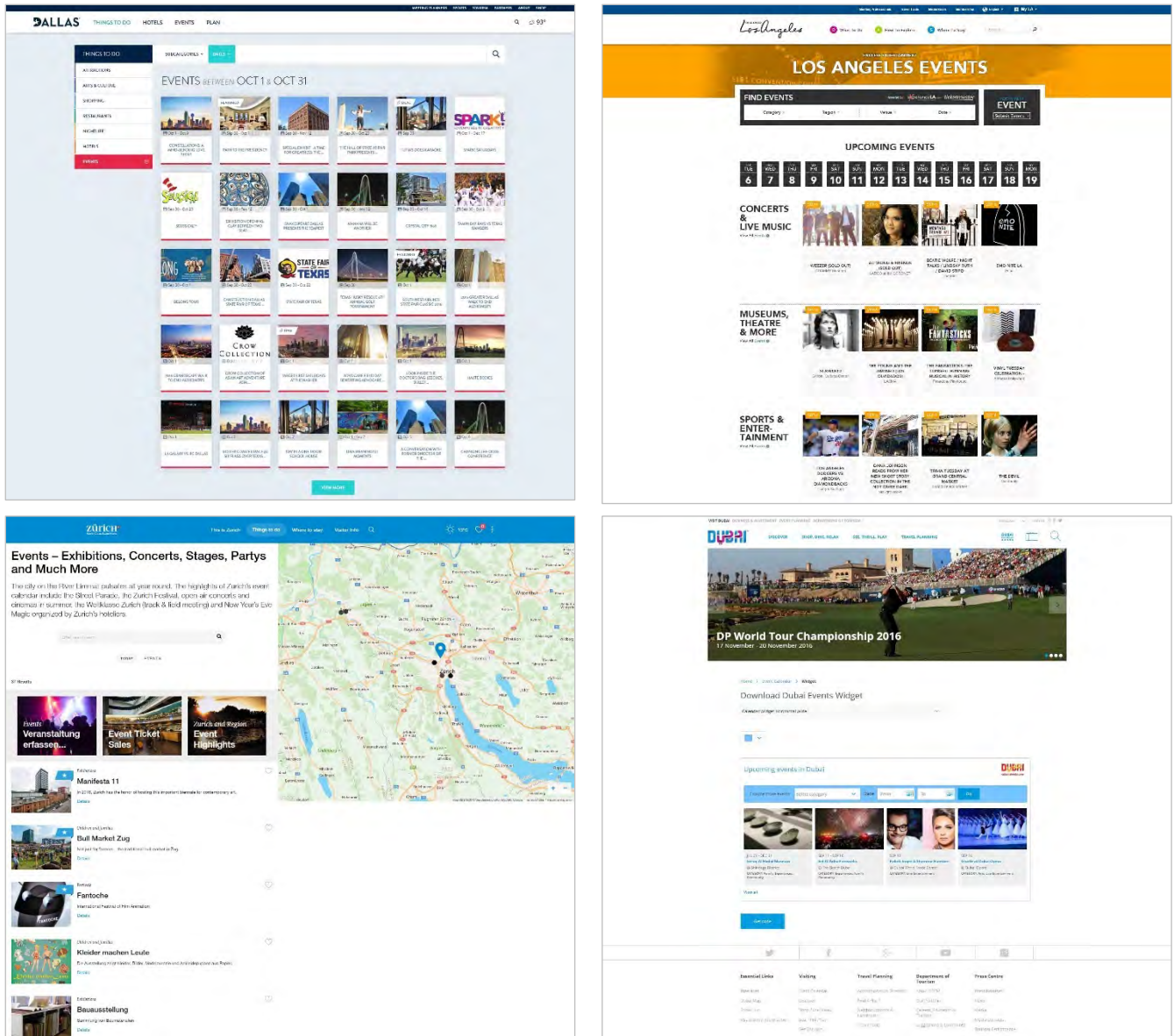
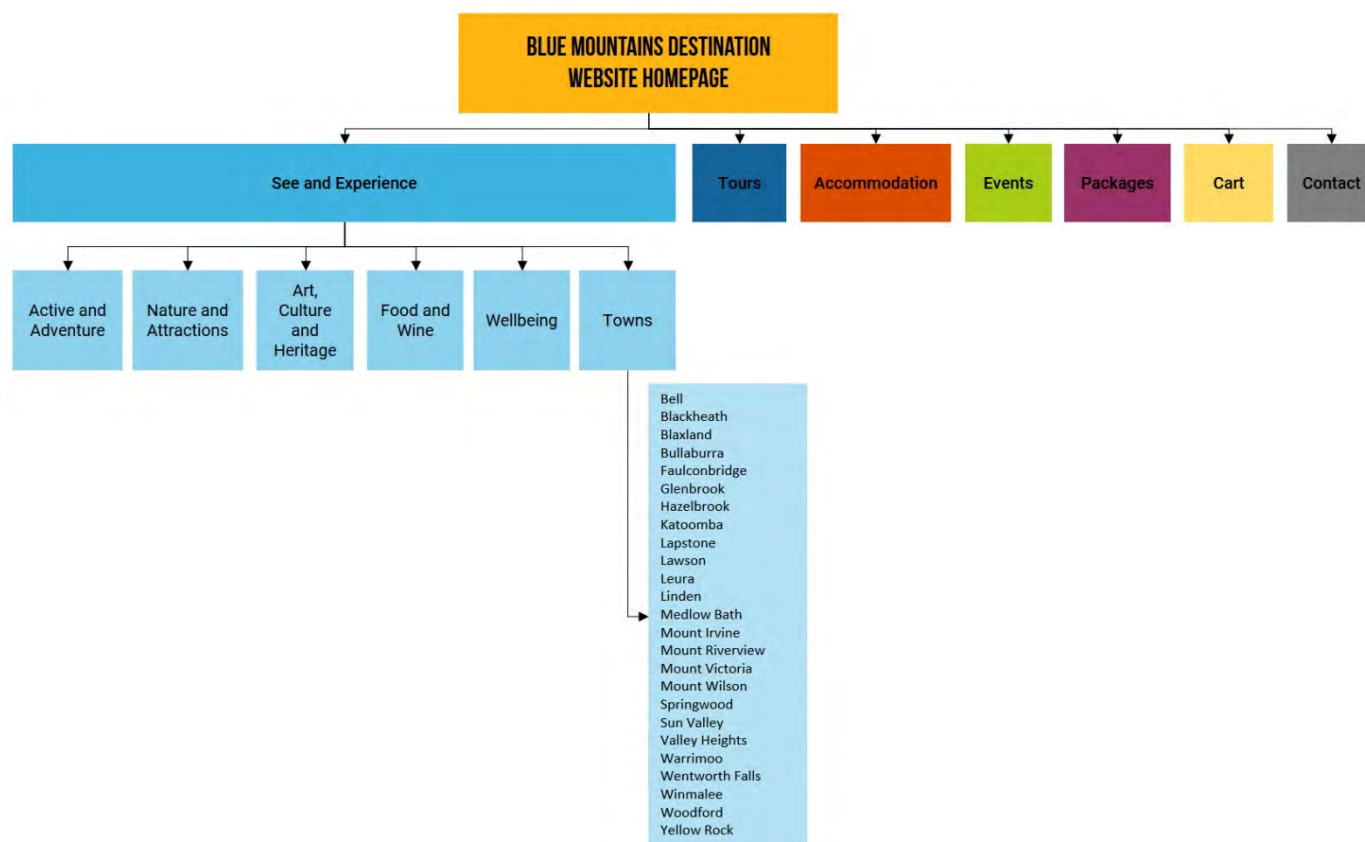


Figure 72 provides an indicative site map for the destination website. Rather than focusing the flow of the website on the towns/villages, we consider there is a need to focus on the experiences offered.

Figure 72: Indicative Blue Mountains Destination Website Site Map Flow Chart



7.3.4. Echo Point VIC Upgrades (Stage 2)

Whilst funding¹⁶⁰ for Stage 1 of upgrades to the Echo Point VIC has been obtained, funding is still required to commence planning and development for Stage 2. The upgrades to the VIC will include interactive elements¹⁶¹ and opportunities to see the Three Sisters in inclement weather (for example, through an augmented reality experience). Construction of Stage 1 is planned to commence in 2017.

Council has also advised that consultation on the project is underway with key stakeholder groups including the Traditional Owners.

¹⁶⁰ \$2.95m has been funded under Stage 1.

¹⁶¹ It is noted that the new VIC will include interpretive space and a multi-function room as advised by Council.

7.3.5. Katoomba Station Visitor Information

Road access to the Blue Mountains has improved travel times and increased the number of visitors travelling to the area by vehicle. However, a significant number of visitors, particularly international visitors, use the train service from Sydney to travel to the LGA.

While Echo Point has a well-patronised VIC, there is a disconnect between the visitor's point of arrival into Katoomba (for those travelling by train) and Echo Point. There is a need to improve visitor information at (or close by) the station to demonstrate where Echo Point and other major visitor attractions are.

Figure 73 demonstrates the limited visitor information on display at Katoomba Station.

Figure 73: Katoomba Station Exit (Bathurst Street)

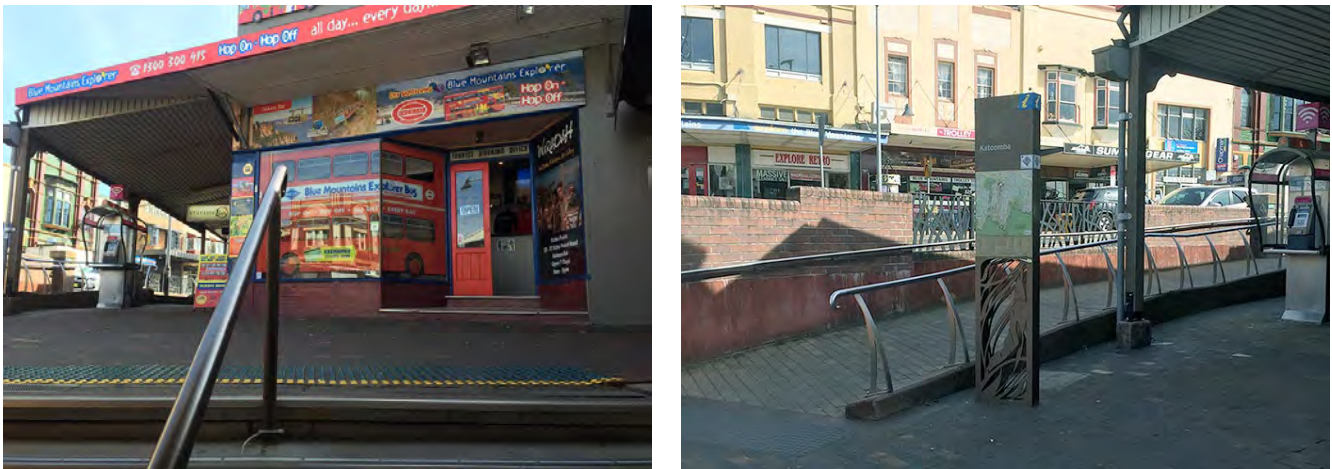
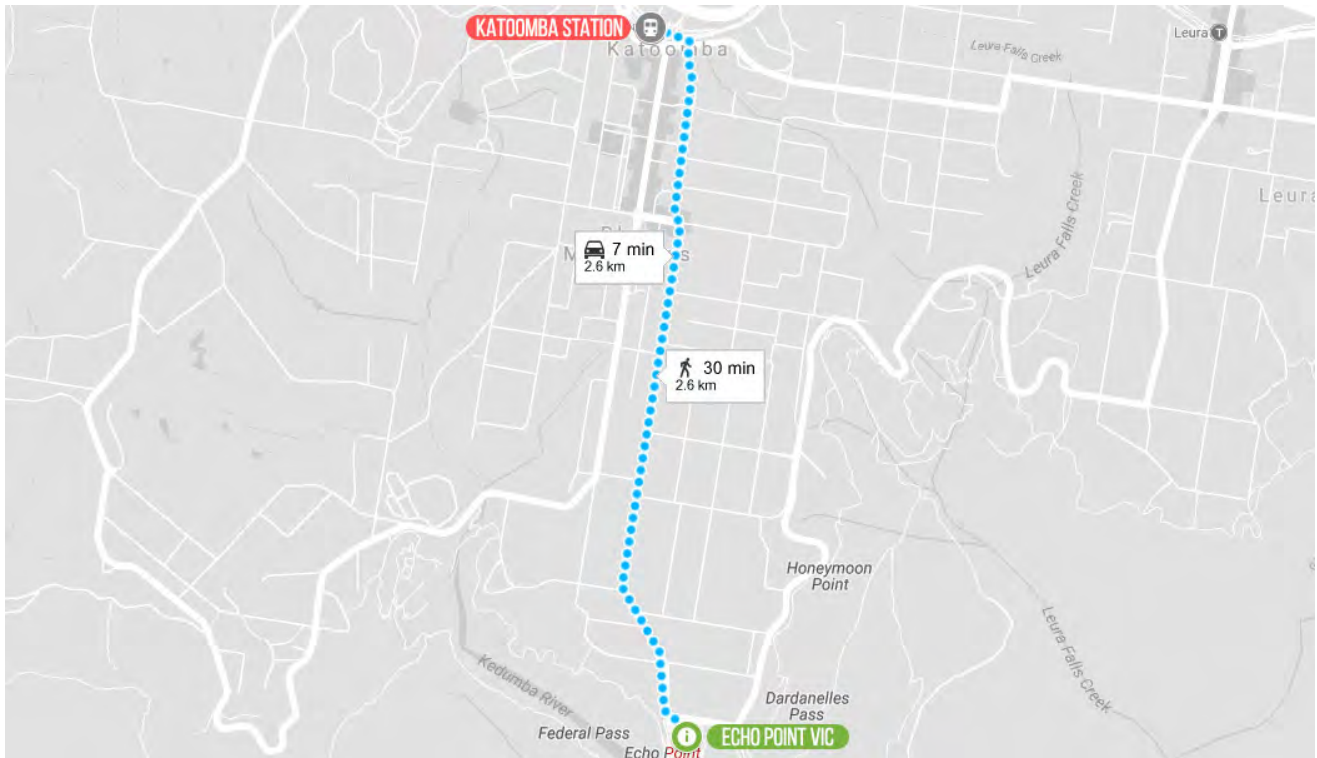


Figure 74 illustrates the walking and drive times from Katoomba Station to Echo Point. While some visitors may be happy to walk the 2.6km (30 min) walk from the station, a large percentage (particularly the elderly and for families) may consider it too far.

During peak periods, staff in shops near the station are inundated with visitor information queries. There is a need to improve visitor information at or near the station to:

- indicate walking distances and times between station and Echo Point;
- provide impartial information on shuttle services and tours visitors can take;
- provide information on other experiences in the LGA; and
- enable the booking of experiences, transport, restaurants/cafés, shuttles and taxis etc.

Figure 74: Walking and Drive Times from Katoomba Station to Echo Point



Enhanced provision of information could be delivered by any of the following.

- **The Copenhagen 'Automated' Model:** A highly customised shipping container which contains a 12-metre multi-touch touchscreen which directly links to a central database and is entirely remotely managed. The container could be open for a set number of hours per day and automatically shut down out of operating hours. The model was designed by a New Zealand firm, Gibson Group, which specialises in interactive experiences.
- **The Mobile Kiosk Model:** A visitor information kiosk in a mobile van or truck. This kiosk could be staffed by a volunteer or Council staff member. This model can be easily transported to key visitor locations and during events.
- **A Pop-up Visitor Information Centre:** A pop-up shipping container which can be relocated when required. This could be staffed by Council staff or volunteers. The potential exists to incorporate interactive touch screens etc. into this model.

Figure 75: Pop-up and Digital VICs¹⁶²



It is recommended that a feasibility be undertaken to determine the cost of implementing the three options. The study should assess information needs at different locations. The automated model may be most suitable for the Blue Mountains because:

- it provides a fully automated solution which does not require staffing and therefore is likely to be more cost effective in the medium to longer term;
- volunteers could potentially be available at the kiosk during peak visitor periods as a value-add;
- it can be remotely managed and updated;
- there should be enough room to locate the container near the station, or close by in Katoomba Street;
- the display can be segmented so that multiple users can touch and control the wall simultaneously, as shown above;
- it could link in with existing databases and is easily updated;

¹⁶² Copenhagen Information Touch Wall, Denmark; ¹⁶² Copenhagen Information Touch Wall, Denmark; Anglesey Mobile Tourist Information Centre, UK (pictured at cruise port); Arlington Mobile Tourist Centre, USA; Canberra and Region Visitors Centre Pop-up, ACT; and Seattle Space Needle Digital Experience and Information, USA.

- it can be relocated if needed; and
- it can shut itself down after a certain time to protect itself from vandalism etc.

7.3.6. Regional Strategic Alliance

Since the demise of BMLot, stakeholders have found it challenging to market the Blue Mountains as well as their individual product. While they recognise the effort made by BMATA, there is an understanding that latter's mandate is to promote its members' product and that it is a volunteer organisation with limited funding.

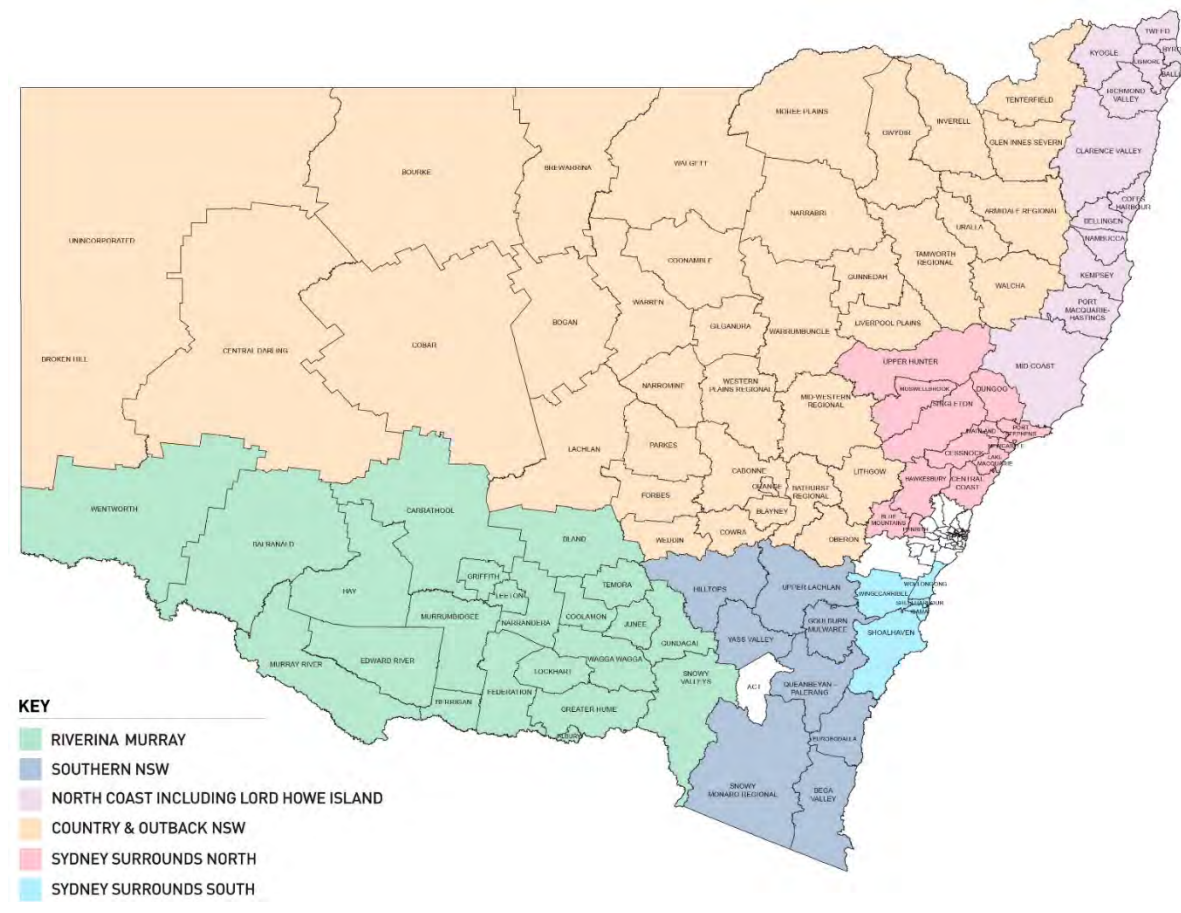
Once the RSA is formalised there is a need to promote its role(s). Industry is particularly keen to have Council involvement in any regional tourism body so there is transparency and wider operator support.

Whilst the RSA will be responsible for marketing the Blue Mountains, Penrith and Hawkesbury LGAs as a single region, care must be taken to ensure that the Blue Mountains brand is profiled first and foremost (noting that it has the highest brand recognition of the three LGAs).

Under the new Destination Network structure¹⁶³, the Blue Mountains, Penrith and Hawkesbury LGAs fall within the *Sydney Surrounds North* Destination Network along with 10 other LGAs (Figure 76). Again, care must be taken to ensure that the Blue Mountains brand is incorporated as a stand-alone brand.

The RSA would appear to be one of the first sub-regional tourism collaborations under the Destination Network umbrella.

Figure 76: Destination Networks Structure



¹⁶³ July 6, 2016 - <http://www.destinationnsw.com.au/our-industry/destination-networks>

7.3.7. Tourism Awareness Campaign

There is insufficient understanding about the important role tourism plays in the Blue Mountains economy and why it needs strong support.

There is also a lack of awareness of how the tourism dollar spreads throughout the economy (Figure 77).

The Blue Mountains' tourism industry¹⁶⁴:

- is valued at \$341.9m and accounts for 8% of total output (compared with a NSW state average of 3.2%¹⁶⁵);
- accounts for over 1.7k jobs, comprising 10.7% of all employment in the LGA (compared with a NSW state average of 5.43%¹⁶⁶).

Council should consider developing and implementing a tourism awareness campaign to show:

- how the tourism dollar disperses through the local economy (the direct and indirect impact of visitor spend);
- what businesses benefit from tourism including cafés, retailers, service stations, bars and transport providers etc;
- how extended trading hours (even seasonally) can benefit the community;
- what the estimated value of tourism is via direct, indirect and induced spending impacts (this could be demonstrated in terms such as how many loaves of bread, cups of coffee and litres of fuel etc. are purchased by tourists on any given day: a large figure such as \$341.9m does not provide the information needed to illustrate its impact on local businesses and their suppliers); and
- why Council/ratepayer funding is required to maximise returns to the LGA's community via economic, social and infrastructure benefits.

Figure 77: The Importance of Tourism



¹⁶⁴ Note this incorporates both tourism and hospitality

¹⁶⁵ <http://www.economicprofile.com.au/bluemountains/tourism/output>

¹⁶⁶ <http://www.economicprofile.com.au/bluemountains/tourism/employment>

7.4. Supporting Infrastructure/Projects

7.4.1. Advocate for 8 Carriage Train Service

There is a need to increase the number of train carriages on certain services from Sydney to the Blue Mountains. On weekends and public holidays, there is a need for eight-car train services rather than four-car. As the Blue Mountains becomes an increasingly popular mountain bike destination, there is also a need for bike storage in carriages.

There is a need for Council and industry together to advocate for these changes. NSW State Rail indicated that new, more spacious, carriages could be operational by 2020.

7.4.2. Coach Layover Hub

There are growing challenges with parking and traffic congestion. Operators, including leading tour coach companies, indicated that whilst drop off areas worked well at Echo Point, some bus users are not following the drop off rules because there is nowhere else for them to park whilst their tour participants are exploring and there is little to no monitoring of their actions. A solution identified is the development of a coach layover hub. The hub could provide:

- 20 – 30 coach parking spaces, including spaces for smaller buses which are increasingly coming to the Blue Mountains as the nature of tours change; and
- a central facility with toilets, showers and a lunch room where bus drivers can rest.

The hub should support Katoomba and Leura. Its potential site needs to be investigated as part of a feasibility study.

Additionally, there is a greater need for the proactive management of coach parking by designated Council staff.

7.4.3. Leura Coach Drop Off

Coach operators indicated their need for a dedicated drop off parking space in Leura. Currently, coach operators struggle to find a safe place where they can stop and drop off their passengers.

Council has also identified the need for a bus set down location within their Leura Tourist Bus Strategy.¹⁶⁷

Coach tour operators suggested that if a coach layover hub was available between Leura and Katoomba, they could drop off their passengers in Leura (using a designated coach drop off spot) and then park at the coach layover hub whilst their passengers have 1 hour for lunch and to explore the main street of Leura.

There is a need, then, to develop somewhere close to Leura's main street, 1 to 2 drop off points where coaches can stop, set down their passengers and travel onto the coach layover hub.

7.4.4. Mustering Areas for Larger Groups

There are also challenges associated with finding locations where larger groups can congregate and sit down together. There is a need to identify a location, at Echo Point and potentially other major lookout areas, for a mustering area for groups of 30 to 50 people. The mustering area should include seating and cover to cater for days of inclement weather. These should be open sided structures which also contain useful information boards on sites of significance etc.

¹⁶⁷ As per the Leura Tourist Bus Strategy and Enclosure 2

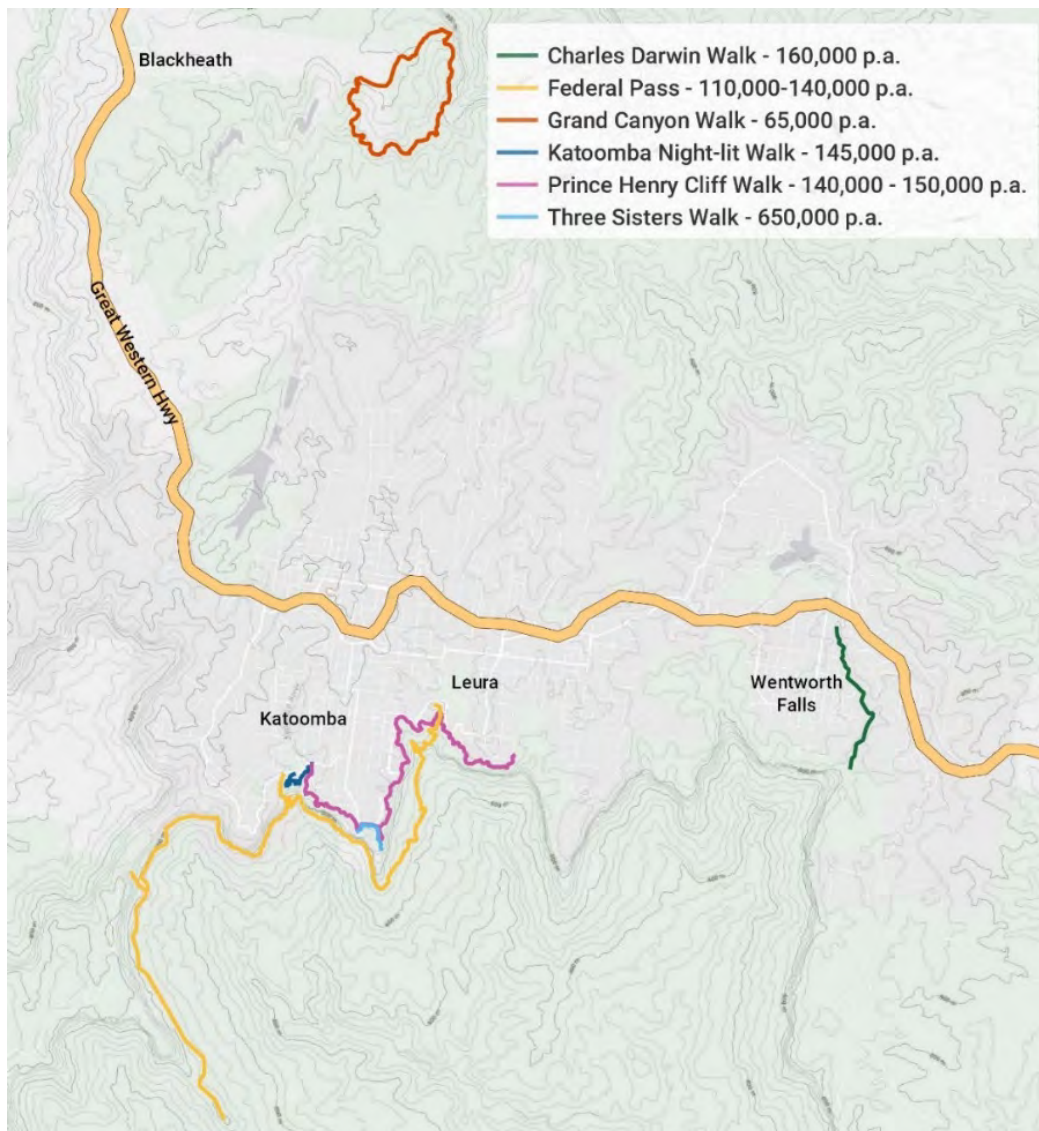
7.4.5. Park and Ride for Day Walks

The Blue Mountains has a wide range of recognised walking experiences, a number have recently been upgraded by Council and the NPWS.

The walking and cycling paths receive strong local and visitor patronage.¹⁶⁸ The Three Sisters Walk attracted an estimated 650k visitors in the 12 months to June 2015 (Figure 78).

An opportunity exists to consider enhancing supporting infrastructure, such as park and ride shuttle buses (for peak periods), improved signage, rest areas and viewing platforms.

Figure 78: Estimated Visitation for Popular Day Walks¹⁶⁹



¹⁶⁸ As per the Blue Mountains Open Space and Recreation Survey 2016, we note that out of the 442 residents surveyed, almost 70% used bike trails, walking tracks and bushland reserves at least monthly.

¹⁶⁹ Figures supplied by Council. Note: NPWS has supplied post-upgrade estimates for the Grand Canyon Walk and Three Sisters Walk being 300k and 900k respectively.

7.4.6. Signage for the Blue Mountains Cultural Centre

The BMCC in Katoomba is one of the most visited public gallery spaces in the Western Sydney region.¹⁷⁰ In addition to a gallery, the Centre also features a World Heritage Interpretive Centre, a library, a Street Art Walk, café and shop. From 2013 – 2015, the Centre attracted between 105k – 132k visitors per annum.

A major challenge for the Centre is increasing its street presence to grow foot traffic. As the Centre is located away from the tourist route along Katoomba Street (though it can be accessed via laneways¹⁷¹ from Katoomba Street), there is a need to introduce stronger wayfinding signage. The potential also exists to introduce a signage trail, potentially originating from Katoomba Station, which visitors can follow and which leads them directly to the Cultural Centre.

7.4.7. Signage Strategy Review

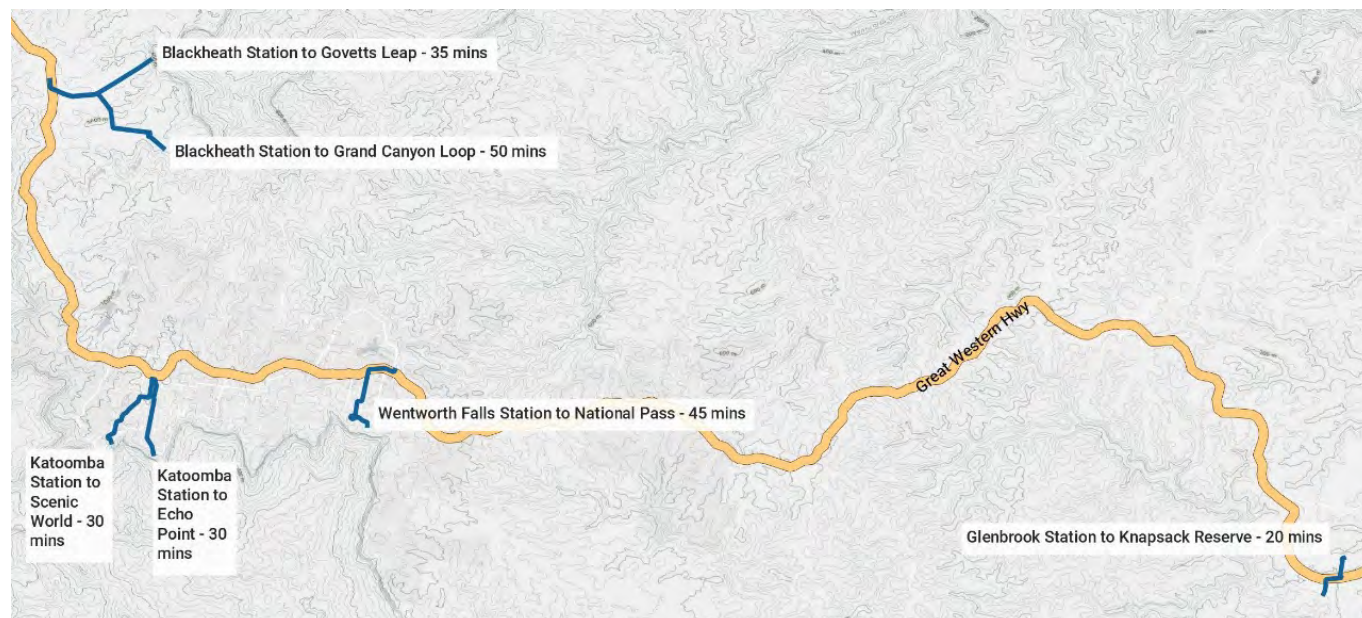
In 2010, Council commissioned a review of road, pedestrian and town entry signage.¹⁷² There is a need to review this strategy, with a particular focus on improving wayfinding and interpretive signage throughout the LGA as well as a plan for the ongoing review and maintenance of this signage. This will help ensure there is continuity for all signage (static and electronic).

The potential may exist to develop a regional signage strategy as an initiative of the RSA to ensure a consistent approach is applied throughout the wider region, which, in turn, will support drive circuits, and cycle and walking trails across LGA boundaries.

Sites where signage was needed and was considered to be particularly challenging included: Katoomba Station; the BMCC (to improve visibility/awareness of the attraction); Glenbrook VIC; Megalong Valley; train stations generally to major walks and points of interest; and gateways for the entrance into the WHS.

Figure 79 illustrates walking times from train stations to main walking tracks and attractions which could be used in wayfinding signage.

Figure 79: Walking Times to Various Walking Tracks and Attractions



¹⁷⁰ Based on Council feedback

¹⁷¹ Such as Froma Lane

¹⁷² Tourism Signage, Blue Mountains City Council, November 2010

7.4.8. Tourism Precinct Development

The lack of designated areas to allow for larger scale forms of tourism development and supporting infrastructure is a major constraint on addressing capacity constraints and helping to fill tourism product gaps.

Consideration should be given to creating a designated tourism development precinct which can support the needs of current visitation and which can offer the chance to cluster tourism activity and venues to better control and manage their benefits and impacts.

A number of new larger scale tourism amenities are required to support sustainable growth of the visitor economy. The elements which a designated tourism precinct could look to integrate and cluster include:

- a larger scale, internationally branded accommodation property, ideally of a higher scale quality;
- an accompanying conference venue to deliver a 650 - 850 seat auditorium for theatre style functions and events and 450-500 for banquets;
- a site for a new recreational attraction which might include a mix of indoor and outdoor elements such as a canopy walkway, zip-lines, a luge, indoor climbing walls, rope courses and trampolines etc.;
- an outdoor natural amphitheatre with a 2k seat capacity;
- above and below ground car parking to cater for all of the new attractions and amenities along with adding additional capacity to help address parking constraints for major visitor hubs where congestion already occurs;
- the creation of a people mover (electric bus, skyrail or gondola) to move people silently between various amenities and facilities quickly and efficiently and to link with attractions and facilities where practical; and
- offering space for a high-quality destination holiday park offering sites for RVs and caravans, chalets and camping sites along with shared amenities and water features etc. to attract the family and under 10 years of age market.

A dedicated tourism precinct can also offer vegetated buffer zones to create natural barriers to surrounding land uses and to ensure the facilities blend with the natural environment. Provision would also be needed for cycle ways and walking trails along with high-quality open space areas so areas could be well used for general recreational pursuits (picnicking etc.).

The creation of a tourism precinct will also enable increased potential for joint marketing of attractions and events along with the opportunity to master plan an area to ensure best use outcomes and benefits are achieved.

A tourism precinct could offer important benefits to the local community including:

- stronger employment generation;
- recreational facilities for sport and leisure;
- support for the local visual and performing arts sectors, heritage and social history; and
- areas which could be used for dog parks and general recreation.

7.4.9. UNESCO World Heritage Site Entry Signage

Australia has 19 UNESCO WHSs¹⁷³. There is a need to highlight to visitors when they are entering the “Greater Blue Mountains Area - a UNESCO World Heritage Site”. Signage should promote the uniqueness of the area, possibly highlighting attributes such as the fact that the GBMA is ten times older than the Grand Canyon and that it covers one million hectares etc.

There has previously been a desire to develop gateway signage, however, there are challenges in achieving sign off from State Government agencies. If Council is unable to place signage on major highway/motorways, it should consider placing gateway signage at Council-owned locations such as at the Glenbrook VIC, which could still be visible from the Great Western Highway.

Figure 80: Examples of Destination Gateway Signage



¹⁷³ <http://www.australia.com/en/articles/world-heritage-sites-australia.html> and <http://whc.unesco.org/en/statesparties/au>

7.4.10. Upgrades to Key Tourism Infrastructure

Table 22 has been provided by Council to list identified tourism-related infrastructure projects and their cost. The projects have not been prioritised and no feasibility studies have been completed to support the quantum of investment required. Nevertheless, all are noted by Council as essential to support and improve the visitor economy and warrant further investigation and resourcing.

Table 22: Upgrades to Key Infrastructure Required¹⁷⁴

Signature Attractions of World Renown		Cost (\$'000)
Grand Cliff Top Walk	Wentworth Falls – Katoomba (walking track)	\$5,500
	Katoomba – Blackheath (walking track)	\$8,500
Greater Blue Mountains Trail	Blackheath – Mount Victoria (cycle track)	\$4,500
Eastern Escarpment	Lapstone-Yellomundee RP-Blue Mountains NP (walk/cycle tracks)	\$9,500
Cradle of Industry	Western Escarpment Historic Roads	\$800
	Hartley Vale Shale Works Interpretive Walk	\$1,200
		\$30,000
Engaging with Nature – The Best of Nature-Based Recreation		Cost (\$'000)
Wentworth Falls	Wentworth Falls Lake Boardwalk	\$800
Katoomba	The Gully Aboriginal Interpretive Walk upgrade	\$200
Camping	Campground Upgrade (6 locations) and provision for Freedom Camping at designated locations	\$2,200
Adventure Sports (rope based)	Additional parking, amenities, access trails (Mt York, Mt Boyce, Mt Piddington, Shipley, Katoomba)	\$650
Citywide	Accessible tourism (access and parking) at various locations	\$600
Mountains Biking	XCountry trail improvements/pump track development	\$600
		\$5,050
Community Hosted Tourism – Town Centres Transformed		Cost (\$'000)
Blackheath	Town Centre Upgrade (additional coach/car parking, streetscape redevelopment)	\$4,000
Katoomba	Town Centre Streetscape redevelopment (including Lurline Street)	\$4,250
	Blue Mountains Cultural Centre expansion of performance/exhibition opportunities	\$5,500
	Civic Centre Upgrade (event space)	\$4,500
	Katoomba Town Centre Amenities and Visitor Information Upgrade	\$2,000
	Reuse of the former Katoomba Golf Course	\$6,500
	Yeamans Bridge Upgrade	\$10,000
Leura	Town Centre Upgrade (additional coach/car parking, streetscape redevelopment)	\$2,500
Wentworth Falls	Town Centre Upgrade (amenities, additional car parking, streetscape redevelopment)	\$1,600
	Additional Parking (satellite locations)	\$750
Glenbrook	Glenbrook Regional Park Upgrade (amenities & parking)	\$2,000
City-wide	Expansion of the Street Art walk and increased public art opportunities	\$1,600
		\$45,200
Destinations of Choice		Cost (\$'000)
Katoomba	Echo Point Visitor Information Centre Upgrade	\$4,400
	Echo Point Amenities Upgrade	\$1,200
	Lillianfels Park Amenities	\$800
	Katoomba Falls Reserve Amenities	\$800
	Katoomba Falls Reserve Precinct Upgrade	\$300
	Blue Mountains National Park Narrow Neck Upgrade	\$900
Blackheath	The NPWS Heritage Centre Upgrade	\$2,000
	Govetts Leap Precinct Upgrade	\$1,500
	Evans Lookout Precinct Upgrade	\$2,000
	Memorial Park Amenities/Precinct Upgrade	\$1,200

¹⁷⁴ The table was provided by Council as part of their application to the Greater Sydney Commission.

Leura Cascades	Solitary Restaurant redevelopment	\$2,200
	Leura Cascades Precinct Upgrade	\$1,250
	Leura Cascades Amenities	\$600
Wentworth Falls	Wentworth Falls Lake Precinct Upgrade (amenities/public domain infrastructure)	\$1,400
	Conservation Hut Precinct Upgrade	\$2,000
Glenbrook	Glenbrook Visitor Information Centre Upgrade	\$1,200
Mt Wilson	Mt Wilson Reserve Upgrade (amenities/parking)	\$400
		\$24,150
Planning for the Future		Cost (\$'000)
Katoomba	Southern Scenic Escarpment (inc. Echo Point) Master Plan & Plan of Management	\$125
	The Gully Aboriginal Master Plan & POM	\$50
Glenbrook	Eastern Scenic Escarpment Master Plan & POM	\$125
Lower Mountains	Great Blue Mountains Trail (Leura-Glenbrook) Scoping and Design Study	\$100
Citywide	Blue Mountains Camping Strategy	\$20
	Aboriginal Cultural Tourism Business Plan	\$25
	Event Development & Facilitation Strategy	\$20
	Visitor Contributions Strategy	\$15
	Crown Lands Tourism Engagement and Utilisation Study	\$25
		\$505
		\$97,805

7.4.11. Wentworth Falls Parking Improvements

There is a need to investigate strategies to improve parking at the Wentworth Falls Lookout. During peak periods, parking at the Lookout is often at capacity, particularly as there are a range of walks varying in length (up to 5 hours¹⁷⁵). Council and the NPWS are working together to resolve parking issues and completed a parking study in 2016.

There is a need to determine and agree:

- whether additional parking is needed;
- whether a timed parking solution can be introduced for some spots (which could increase parking turnaround); or
- whether pay for parking should be introduced.

The NPWS are investigating using a reserve site to allow visitors going to Wentworth Falls to park vehicles and using a minibus shuttle service to get to and from the lookout site and walkways.

¹⁷⁵ The Wentworth Pass circuit is estimated to take from 4 – 5 hours to complete



8. TOURISM PLANNING

8.1. SP3 Tourist Zone

The planning framework is set by the Environmental Planning and Assessment Act (1979) and by the Blue Mountains LEP 2015. Although a standard instrument, LEP 2015 is one of the more bespoke LEPs in NSW in recognition of the challenges of urban settlement in the Blue Mountains. In line with outcomes of extensive community engagement, that framework identifies core values aligned with the natural environment of the Blue Mountains and its special character and heritage. These values are in keeping with Council's community strategic plan and represent those aspects of the Blue Mountains that differentiate it from other parts of Sydney.

Protecting development from bushfires and maintaining water quality, heritage values and residential amenity, are challenges that regularly arise. By way of example, Council recently approved a proposal by Scenic World to extend operating hours so that the company could tap into emerging markets and incentivise packages. It is a good case study of the balance that can be achieved, with Scenic World working with residents and Council negotiating a workable outcome.

As well as this DMP, Council is progressing with a Planning Proposal to introduce an SP3 Tourist Zone, which aligns with the 2011 study prepared by The Stafford Group. Council has already undertaken non-statutory informal consultation to gauge community views, concerns and or support for the introduction of the new standard instrument zone. While the number of submissions received that dealt specifically with the SP3 Tourist Zone was limited, they supported the new zone, pending amendments to objectives and permitted land uses.

The specific provisions of Council's planning proposal are that:

- recommendations and associated proposed planning provisions for key tourist sites identified be endorsed;
- tourism uses are facilitated and preserved by introducing the SP3 Tourist Zone into LEP 2015, through applying the SP3 Tourist Zone to specific sites and by changing the zoning of other strategic tourism sites in the LGA; and
- as well as amending the LEP 2015, there will also be a need to change the Blue Mountains DCP 2015.

In addition, Council's sustainability assessment of the planned changes indicates there are no negative effects from environmental, social, economic or governance-related changes. Furthermore, there are positive benefits across all these areas, including that:

- environmental controls will still apply to the sites for the SP3 Tourist Zone and offer ongoing protection;
- existing sites used for tourism and recreational purposes are protected from unsuitable and incompatible development;
- the new SP3 Tourist Zone will support an increase in the range of tourism and recreational activities in the LGA;
- the local visitor economy will be maintained and supported to attract visitors;
- from a governance perspective, the new SP3 Tourist Zone will help to encourage new and innovative tourism and recreation; and
- the outcomes will help lead to best practice tourism planning outcomes and related planning processes.

The 2011 Stafford Group report¹⁷⁶ suggested many of these recommendations, aimed at improving certainty for investment into the tourism and hospitality sector. Importantly, this is achievable without compromising environmental standards, community needs and liveability values and principles.

Nevertheless, the DA process is inherently challenging. This DMP acknowledges the competing priorities at times and the underlying values (economic, social, environmental and cultural) which underpin the tourism industry and which often emerge in the development assessment process.

8.2. Escarpment Planning Precincts

8.2.1. Overview

Council is planning to develop a range of key planning documents for the Scenic Southern Escarpment tourism precinct. Preparation of a Masterplan and Plan of Management will provide the strategic framework to guide the maintenance and development of tourism infrastructure in Wentworth Falls, Leura and Katoomba. Council is planning to complete the Masterplan in 2017/18.

Key elements of the Escarpment Precinct Masterplans are outlined in Table 23.

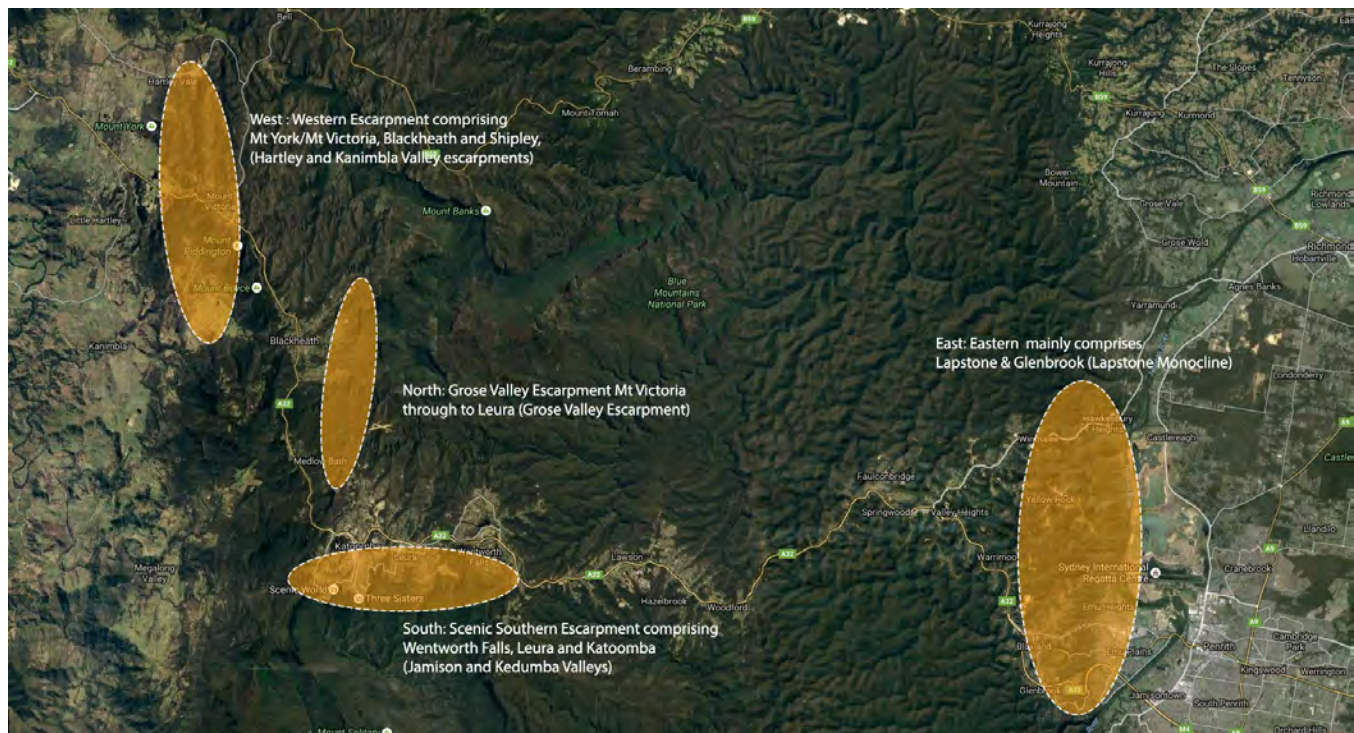
Table 23: Key Elements of the Masterplans

Project Title	Elements
Southern Scenic Escarpment Master Plan/Projects	Council will undertake a Masterplan & Plan of Management over 2016/17 & 2017/18 but there are a number of specific projects already underway.
Eastern Escarpment Master Plan including Lapstone Tunnel	<p>There are significant heritage sites located within Eastern Escarpment Precinct, including:</p> <ul style="list-style-type: none"> ▪ Lennox Bridge; ▪ Knapsack Viaduct; ▪ Lapstone Zig Zag; and ▪ Lapstone Tunnel (aka Glenbrook Tunnel). <p>The Master Plan will include a detail planning and design phase for the numerous localities within the eastern plan in context with broader district and regional recreational and tourism planning priorities.</p>
Four Geographic Precinct Master Plans	<p>Council intends to complete Masterplans for the four geographic precincts (north, south, east & west):</p> <ul style="list-style-type: none"> ▪ North: Grose Valley Escarpment Mt Victoria through to Leura (Grose Valley Escarpment) ▪ South: Scenic Southern Escarpment comprising of Wentworth Falls, Leura and Katoomba (Jamison and Kedumba Valleys) ▪ West: Western Escarpment comprising Mt York/Mt Victoria, Blackheath and Shipley, (Hartley and Kanimbla Valley escarpments) ▪ East: Eastern mainly comprising Lapstone & Glenbrook (Lapstone Monocline)

¹⁷⁶ Blue Mountains Strategic Tourism and Recreation Planning Study (2011)

The four proposed planning precincts are shown in Figure 81.

Figure 81: The Proposed Escarpment Planning Precincts



8.2.2. Benefits of a Tourism Precinct

There are already challenges in meeting visitor demand to Echo Point, Leura and Blackheath. A need is seen to identify future proofing options to allow for sustainable and improved visitor experiences without impacting negatively on local amenities and quality of life. There are very few locations, especially in Katoomba, to allow for improved parking options and to cater for visitor growth. The benefits of creating a dedicated and zoned tourism precinct include:

- addressing vehicle/parking congestion;
- identifying future proofing solutions;
- offering a master-planned approach to solving a number of challenges and introducing supporting infrastructure;
- creating economic benefits focused on generating local employment opportunities;
- delivering facilities to serve a local market/community need as a visitor market;
- providing the potential for private sector investment to fund commercial facilities and supporting infrastructure;
- creating new walkways, cycleways, improved dog walking parks and enhanced public open space;
- protecting and preserving environmental areas through offering large vegetated buffer zones;
- deliberately avoiding areas with high residential use and focusing on areas with mostly tourism-related activity;
- encompassing land uses which are either directly involved in tourism or uses which are complementary to them; and
- allowing for zoning of a dedicated tourism precinct to offer clarity and certainty to operators, developers and investors to support sustainable and desirable tourism and recreational development.

8.3. Tourism-Related Planning Principles

8.3.1. Introduction

The public spaces in town centres provide important pedestrian focused areas. This is a physical setting where people's ability to encounter a place - on foot - is at its most intense and varied. Unlike being a passenger or driver in a moving vehicle, this experience is entirely in the direct control of the individual and encompasses directional and impulse behaviour.

The location of all components of a town centre's public space environment - its footpaths; its incidental off-street spaces; its laneways – service or otherwise; its surface carparks – in short, all parts of a town centre that are unambiguously available for pedestrian movement and use (but not necessarily in public ownership) need to be mapped and examined for their existing and potential public use. The mechanism to achieve this is a variety of physical interventions and activities that could be encouraged. A public space audit should be carried out to include all public space opportunities.¹⁷⁷

8.3.2. Giving the On Foot Local and Visitor Priority

There is potential to modify the town centres' public spaces and pedestrian routes to introduce the walking visitor to a subtle physical environment that indicates the pedestrian's strategic importance to the life of each town centre.

8.3.3. Create Well-Located Town Centre Public Spaces

There is potential to create public spaces that are close to major activity generators (i.e. a local shopping strip or similar local destinations) or existing (or potential) pedestrian routes within a town centre. These may capitalise on existing pedestrian movements and reinforce them by increasing the reasons people may choose to use a particular town centre.

8.3.4. Create a Town Centre that is Pedestrian Centered

All new public spaces need to make effective use of their pedestrian potential in existing environments to better suit and transform the walking environment of the town. This focus underpins both the walking environment for the local pedestrian resident and for the on-foot visitors to the town centre.

An example of this would be to use the resurfacing of a street (using paving identified with the walking environment) to connect a new, adjacent town centre public space with both sides of the existing pedestrian pavements in the middle of a town centre.

8.3.5. Consider Introducing a Shared Street

Streets can be modified to include the surface cross-section of a principal town centre street to offer a consistency of surface level and materials. The intention is to show the priority given to foot traffic within a town centre and to modify the traffic speed and behaviour of vehicle movement. This is particularly the case where a street is significant for its pedestrian use by local residents and visitors.

An example of this would be the introduction of a shared street where a single surface level is introduced across a street at the same height as the existing pedestrian pavements. This shared area (which would include and absorb the formerly raised pedestrian pavements) is then resurfaced in a paving material associated with the town centre's walking environment (as opposed to the typical tarmac street surface). The kerb is removed and kerb drainage is replaced by a surface-mounted street grate, draining to a covered drainage channel.

¹⁷⁷ See Section 9 of the Supporting Documentation for tourism related planning principle concepts.

8.3.6. Set Up Footpath Spaces to Encourage Al Fresco Dining

There is a need to ensure the pedestrian footpath areas in main streets are wide enough and of a sufficiently gentle camber, to encourage outdoor food-based retail at intervals along these streets.

Evidence suggests that it is difficult to establish a successful al fresco street dining where street pavements have a camber on them that introduces a noticeable tilt to the tables and chairs.

8.3.7. Introduce an Avenue of Street Trees

Street trees are part of the furniture of a well-considered walking environment. They provide shade, texture, visual delight and (if well chosen) a sense of seasonal change to a street. They are at their most effective when they are located and laid out as a regular avenue, with matched trees on both sides of a street, and where the selection of tree type owes more to the qualities of shade, texture and seasonal change than to the pure doctrine of indigenous tree type. The predictable difficulties of tree root growth and interruption over time can be effectively managed by being attentive to tree selection and street infrastructure design and tree placement.

8.3.8. Exploit a Town Centre's Walking Environment to Maximise Potential Pedestrian Use

Identify all parts of a town centre's existing walking environment to map what components are unexploited and could be modified to further promote their discovery and use by pedestrians.

An example of this is provided by the service laneways to the east side of Katoomba Street. Currently, these laneways are edged by largely blank building walls and are treated primarily as car access to small surface car parks and buildings set further down the east facing slope, off the Katoomba Street ridge line. The topography of Katoomba Street and these eastern laneways are such that the laneways access good views across the valley to Leura and provide their pedestrian users with an ability to orientate themselves within the complex physical setting of Katoomba and its surroundings.

8.3.9. Welcome the Walking Visitor

Ensure the location and layout of visitor information (to be easily encountered by the walking visitor) occurs at principle points of engagement, orientation and arrival.

An example of this opportunity occurs at the junction of Katoomba Station and Katoomba and Gang Gang Streets, where exiting visitors who have arrived by train arrive at the northern end of Katoomba's main street. Currently, they are ushered out onto a narrow, rather ungenerous pavement facing a large vehicle roundabout and with little comprehensive visitor information or town centre orientation available to them. They are immediately diverted right to an uncontrolled street crossing where vehicles moving east down Gang Gang Street queue to enter the roundabout.

8.3.10. Tourism Related Urban Improvements

There is a need to offer tourism-related urban improvements to enhance the visitor experience coming into Katoomba. This includes the need to offer better connectivity between the BMCC and the main street via laneways and access points. There is also a need to improve the attractiveness and functionality of the main street which is an important conduit linking the Katoomba Station to Echo Point especially and where the bulk of on-foot visitors are trying to connect to.



9. MARKET DEMAND

9.1. Visitor Forecasts

Visitor forecasts for the Blue Mountains LGA are based on three scenarios - low, medium and high growth.¹⁷⁸ The forecasts demonstrate the following.

- Under the low growth scenario, visitation is anticipated to grow by 11% (336k visitors) over a 10-year period assessed. This level of growth reflects natural growth in visitation to the Blue Mountains with minimal new product development or new marketing initiatives.
- Under the medium growth scenario, visitation is anticipated to grow from 3.1m visitors in 2016 to 3.6m visitors by 2025 – total growth of 16% (or 503k visitors). This growth is driven via the domestic and international day visitor markets, with 15% (231k visitors) and 19% (187k visitors) growth respectively. To achieve this level of growth, it is assumed that new product would be introduced, such as the Great Walk, a new recreational visitor attraction and the Wentworth Falls Lake upgrades etc.
- Under the high growth scenario, visitation is anticipated to grow by 41%, increasing from 3.2m in 2016, to 4.5m by 2025. This high growth scenario assumes the introduction of a 200 to 250 room hotel with conferencing facilities as well as a variety of other opportunities identified in this DMP. The introduction of the hotel, however, is a catalyst for the strengthening of the overnight visitor market, with the domestic and international overnight markets growing by 393k (72% growth) and 39k (76%) respectively. The day markets are also forecast to grow, with the domestic market anticipated to grow by 452k visitors (28% growth) and the international day market forecast to increase by 415k visitors (41%).

Table 24: Visitor Growth Forecasts¹⁷⁹

	2016f ¹⁸⁰	2020f	2025f	Total Change (2016 – 2025)	Change %
Low Growth					
Domestic Day	1.55m	1.63m	1.71m	160k	10%
Domestic Overnight	531k	558k	588k	56k	11%
International Day	972k	1.03m	1.09m	114k	12%
International Overnight	51k	53k	56k	5k	10%
Total	3.11m	3.27m	3.44m	336k	11%
Medium Growth					
Domestic Day	1.56m	1.68m	1.80m	231k	15%
Domestic Overnight	534k	571k	612k	78k	15%
International Day	984k	1.08m	1.17m	187k	19%
International Overnight	51k	54k	58k	7k	13%
Total	3.13m	3.38m	3.64m	503k	16%

¹⁷⁸ Forecasts are based on a range of factors including discussions with stakeholders including DNSW, major bus touring companies, tourism operators and accommodation providers within the region and externally, as well as The Group's experience within the tourism sector.

¹⁷⁹ The full forecasts can be found in Section 10 of the Supporting Documentation.

¹⁸⁰ f = forecast.

	2016f ¹⁸⁰	2020f	2025f	Total Change (2016 – 2025)	Change %
High Growth					
Domestic Day	1.59m	1.80m	2.04m	452k	28%
Domestic Overnight	544k	678k	937k	393k	72%
International Day	1.01m	1.20m	1.42m	415k	41%
International Overnight	52k	65k	91k	39k	76%
Total	3.20m	3.75m	4.50m	1.30m	41%

9.2. Hotel Accommodation Capacity

One of the NSW State Government's major tourism goals is to double overnight visitor expenditure by 2020. To achieve this requires not only growing the number of overnight visitors but increasing the yield achieved from these visitors.

For the Blue Mountains to contribute to this target, there is a need to find ways to increase the percentage of higher spending overnight visitors. In turn, this includes the need to assess room stock and demand. Anecdotal feedback indicates that the LGA has an undersupply of higher quality hotel accommodation (above 3.5 stars).

Table 25 provides an analysis on the current room supply for hotels with ratings higher than 3.5 stars¹⁸¹.

Points to note include the following.

- All visitor forecasts under the low, medium and high scenarios are based on the growth forecasts indicated in Table 24.
- The ALOS, guest room ratio and occupancy rates are based on discussions with operators and applying industry averages.
- Based on 2015 data, an estimated 19% of visitors to the LGA were domestic or international overnight visitors.
- 2015 is the base year as 2016 visitor data is based on forecasts¹⁸².
- A total of 9 properties (with 550 available rooms) were included in the assessment as properties in this category.
- It is estimated that 20% of overnight visitors stay in hotels and of these visitors, 65% stay in higher quality (above 3.5 stars) hotels.
- Occupancy rates average approximately 71%, equating to an estimated 143k guest nights.
- Once the above 3.5-star room stock achieves an occupancy of 85%, this should trigger the need for additional room stock.
- Under the low scenario, the occupancy rate does not reach 85% over the 10-year forecasts. Additional higher quality hotel rooms would be required post-2025.
- Under the medium scenario, the above 3.5-star room stock reaches the 85% occupancy by 2022 and continues to achieve occupancies above this level out to 2025 and likely beyond.
- Under the high growth visitor scenario, the above 3.5-star room stock reaches occupancies above 85% from 2020 onward.

Table 25 indicates that under a medium growth visitor scenario for the Blue Mountains, the need for additional higher quality room stock would be needed from 2022, and, under the higher growth visitor scenario by 2020.

As it often takes 3-4 years (or more) to identify development sites, plan for and gain approval for new accommodation facilities, this process should start from 2017.

¹⁸¹ Importantly, it does not focus on other forms of accommodation (backpackers, caravan parks etc.), separate analysis would be required on these sub-sectors, though this DMP does note the need for one or more quality destination holiday parks.

¹⁸² As no visitor data has been released yet for this period.

It is likely that the supply of new higher quality commercial room stock will drive stronger demand for overnight visitation.

Table 25: Hotel Demand Forecasts

	All Visitors	% Overnight Visitors	Overnight Visitors	% In Hotels	% in Higher Quality	Visitors Using Hotels	Rooms Avail	ALOS	Guest Room Ratio	Guest Nights Used	Guest Nights Avail.	Guest Nights Avail. Spare rooms	Room Occupancy
2015	3.07m	19%	574,815	20%	65%	75k	550	2.7	1.4	143k	201k	58k	71%
Low Scenario													
2016	3.1m	19%	582k	20%	65%	76k	550	2.7	1.4	144k	201k	56k	72%
2017	3.1m	19%	590k	20%	65%	77k	550	2.7	1.4	146k	201k	54k	73%
2018	3.2m	19%	598k	20%	65%	78k	550	2.7	1.4	148k	201k	52k	74%
2019	3.2m	19%	605k	20%	65%	79k	550	2.7	1.4	150k	201k	51k	75%
2020	3.3m	19%	613k	20%	65%	80k	550	2.7	1.4	152k	201k	49k	76%
2021	3.3m	19%	620k	21%	65%	85k	550	2.7	1.4	161k	201k	39k	80%
2022	3.3m	19%	626k	21%	65%	85k	550	2.7	1.4	163k	201k	38k	81%
2023	3.4m	19%	632k	21%	65%	86k	550	2.7	1.4	165k	201k	36k	82%
2024	3.4m	19%	639k	21%	65%	87k	550	2.7	1.4	166k	201k	34k	83%
2025	3.4m	19%	645k	21%	65%	88k	550	2.7	1.4	168k	201k	33k	84%
Medium Scenario													
2016	3.1m	19%	587k	20%	65%	76k	550	2.7	1.4	146k	201k	55k	73%
2017	3.2m	19%	600k	20%	65%	78k	550	2.7	1.4	149k	201k	52k	74%
2018	3.3m	19%	612k	20%	65%	80k	550	2.7	1.4	152k	201k	49k	76%
2019	3.3m	19%	623k	20%	65%	81k	550	2.7	1.4	154k	201k	46k	77%
2020	3.4m	19%	633k	20%	65%	82k	550	2.7	1.4	157k	201k	44k	78%
2021	3.4m	19%	643k	21%	65%	88k	550	2.7	1.4	168k	201k	33k	83%
2022	3.5m	19%	653k	21%	65%	89k	550	2.7	1.4	170k	201k	31k	85%
2023	3.5m	19%	663k	21%	65%	90k	550	2.7	1.4	173k	201k	28k	86%
2024	3.6m	19%	672k	21%	65%	92k	550	2.7	1.4	175k	201k	26k	87%
2025	3.6m	19%	681k	21%	65%	93k	550	2.7	1.4	178k	201k	23k	88%
High Scenario													
2016	3.2m	19%	599k	20%	65%	78k	550	2.7	1.4	149k	201k	52k	74%
2017	3.3m	19%	624k	20%	65%	81k	550	2.7	1.4	155k	201k	46k	77%
2018	3.5m	19%	648k	20%	65%	84k	550	2.7	1.4	161k	201k	40k	80%
2019	3.6m	19%	675k	20%	65%	88k	550	2.7	1.4	167k	201k	33k	83%
2020	3.7m	19%	702k	20%	65%	91k	550	2.7	1.4	174k	201k	27k	87%
2021	3.9m	19%	731k	21%	65%	100k	550	2.7	1.4	190k	201k	10k	95%
2022	4.0m	19%	758k	21%	65%	104k	550	2.7	1.4	198k	201k	3k	98%
2023	4.2m	19%	787k	21%	65%	107k	550	2.7	1.4	205k	201k	- 4k	102%
2024	4.4m	19%	815k	21%	65%	111k	550	2.7	1.4	212k	201k	- 12k	106%
2025	4.5m	19%	842k	21%	65%	115k	550	2.7	1.4	219k	201k	- 19k	109%

9.3. Potential Markets

Table 26 provides a summary of the potential visitor markets which each of the project opportunities created may have greater appeal to.

Whilst many of these projects identified have been suggested to help the sustainability of the visitor economy and to offer future proofing and improved visitor yield, many deliberately offer solutions to current challenges.

The Blue Mountains is a significant visitor destination for the greater Sydney region. Helping to achieve the NSW State Government's goal of doubling visitor spend by 2020 also requires the Blue Mountains to encourage new and enhanced product which, in turn, will stimulate higher visitor expenditure levels.

Table 26: Market Demand

Tourism Development Opportunities	Domestic Day	Domestic O/Night	International O/Night	International Day	Locals	Cruise Ship Day Visitors
Accommodation						
Destination Holiday Park		✓	✓			
Govetts Leap Chalets		✓	✓			
Larger Scale Accommodation Property with Conferencing (200 - 250 rooms)	✓ (amphitheatre)	✓	✓		✓ (amphitheatre)	
Attractions/Experiences						
Bike Station Hire and Trails	✓	✓	✓	✓		✓
Café/Dining for the Blue Mountains Theatre and Community Hub	✓	✓	✓	✓	✓	✓
Cluster of Major Visitor Recreational Attractions	✓	✓	✓	✓	✓	✓
Evening Activities		✓	✓		✓	
Grand Clifftop Walk		✓	✓			
Greater Blue Mountains Trail	✓	✓	✓	✓	✓	
Great Walk		✓	✓			
Govetts Leap Cantilevered Viewing Platform	✓	✓	✓	✓	✓	✓
Katoomba Falls Night Walk and Lights Experience Path Extension		✓	✓		✓	
Knapsack Reserve Trails Hub	✓	✓	✓		✓	
Leura Cascades Upgrades	✓	✓	✓	✓	✓	✓
Megalong Valley Agri-tourism	✓	✓	✓	✓	✓	✓
Mini "Vivid" Experience		✓	✓		✓	
Regional Food Experiences	✓	✓	✓	✓	✓	✓
The Gully Indigenous Interpretation Experience	✓		✓	✓		✓
Trails (Antiques/Bric-a-Brac)	✓			✓		✓
Upgrades to Blue Mountains Heritage Centre	✓	✓	✓	✓	✓	✓
Wentworth Falls Lake Upgrades	✓				✓	
Destination Awareness, Branding and Visitor Information						
Blue Mountains Destination Brand	✓	✓	✓	✓	✓	✓
Blue Mountains Trails App	✓	✓	✓	✓	✓	✓
Destination Website	✓	✓	✓	✓	✓	✓
Echo Point VIC Upgrades (Stage 2)	✓	✓	✓	✓		✓



Tourism Development Opportunities	Domestic Day	Domestic O/Night	International O/Night	International Day	Locals	Cruise Ship Day Visitors
Katoomba Station Visitor Information	✓	✓	✓	✓		
Regional Strategic Alliance	✓	✓	✓	✓	✓	
Tourism Awareness Campaign					✓	
Supporting Infrastructure/Projects						
Advocate for 8 Carriage Train Service	✓	✓	✓	✓	✓	
Coach Layover Hub	✓	✓	✓	✓		
Leura Coach Drop Off	✓			✓		
Mustering Areas for Larger Groups	✓	✓	✓	✓		✓
Park and Ride for Day Walks	✓	✓	✓	✓	✓	✓
Signage for Cultural Centre	✓	✓	✓	✓		✓
Signage Strategy Review	✓	✓	✓	✓	✓	
Tourism Precinct Development	✓	✓	✓	✓	✓	✓
UNESCO World Heritage Entry Signage	✓	✓	✓	✓	✓	
Upgrades to Key Tourism Infrastructure	✓	✓	✓	✓	✓	✓
Wentworth Falls Parking Improvements	✓	✓	✓	✓	✓	



10. ACTION PLAN

The following are the key result areas to be focused on to facilitate the implementation of this DMP.

Short term strategies are those to be implemented within the next three years (2017 - 2019), medium term are those within the following five years (2020 - 2024) and long term are those to be undertaken after five or more years (2025 onwards) but which may need to commence in the medium term.

The DMP is a city-wide plan and Council will take a lead in negotiating responsibility for the delivery of actions where ownership of the action is not clearly identified/known. Council has indicated its desire to retain the DMP Reference Group¹⁸³ to help drive this Action Plan.

As the determination of who will take direct responsibility for each of these various actions and initiatives has yet to be confirmed, a separate action plan column indicating agencies, groups or individuals directly responsible has not been included. Similarly, key performance indicators (which are normally included in an action plan) for monitoring each action, have not been included as this needs to be linked with whomever will be directly responsible for each action's effective implementation.

Once a determination of who will be directly responsible for driving each action is confirmed, this Action Plan can then be updated to reflect this.

Table 27: Action Plan – Accommodation

Action	Tasks	Timeframe	Budget Estimates	Priority
Destination Holiday Park	<ul style="list-style-type: none"> Commission feasibility study including assessment of potential sites, size of site required, mix of product (chalets, camping sites and powered/unpowered RV sites) If feasible, develop investment memorandum to send to potential developers and operators 	Short term	<ul style="list-style-type: none"> \$35k (feasibility) \$20m (development) 	High
Larger Scale Accommodation Property with Conferencing	<ul style="list-style-type: none"> Commission feasibility study, including assessment of possible sites and cost benefit assessment Feasibility should assess integrated hotel, conference venue, event amphitheatre, an attraction and car parking station If feasible, develop investment memorandum to send to potential developers and operators 	Short term	<ul style="list-style-type: none"> \$45k (feasibility) \$122.5m (development) 	High
Govetts Leap Chalets	<ul style="list-style-type: none"> Commission feasibility study for chalets including site requirements If feasible, develop EOI for potential developers and operators 	Short term	<ul style="list-style-type: none"> \$35k (feasibility) \$5m (development) 	Medium

Table 28: Action Plan – Attractions/Experiences

Action	Tasks	Timeframe	Budget Estimates	Priority
Great Walk	<ul style="list-style-type: none"> Undertake consultation program with traditional owners to identify challenges and opportunities and agreed way forward Develop quadruple bottom line benefits assessment for a new Great Walk Identify preferred Great Walk route Develop EOI for developers and operators of the Great Walk 	Short term	<ul style="list-style-type: none"> \$35k feasibility \$3.5m (development) 	High
Café/Dining for the Blue Mountains Theatre and Community Hub	<ul style="list-style-type: none"> Complete feasibility for café/dining option at the Hub, looking at various models which would work best (pop-up, permanent, seasonal, Council operated, lessee etc.) 	Short term	<ul style="list-style-type: none"> \$35k (feasibility) 	Medium - high

¹⁸³ The DMP Reference Group includes a range of stakeholders including Council, NPWS, BMEE, BMATA and industry.



Action	Tasks	Timeframe	Budget Estimates	Priority
Govetts Leap Cantilevered Viewing Platform	<ul style="list-style-type: none"> Develop EOI for designer to create schematics of potential cantilevered platform options and supporting infrastructure enhancements Apply for funding grants to implement selected development option 	Medium – long term	<ul style="list-style-type: none"> \$45k (feasibility study) \$3.5m (design and development) 	Medium – high
Katoomba Falls Night Walk and Lights Experience Path Extension	<ul style="list-style-type: none"> Complete Katoomba Falls walk upgrades as planned Investigate completing 250m walk extension to Scenic World 	Short – medium term	<ul style="list-style-type: none"> \$200k (path lighting extension to Scenic World) 	Medium – high
Stage 2 Upgrades to Echo Point VIC	<ul style="list-style-type: none"> Apply for funding for Echo Point VIC stage 2 upgrades 	Short term	<ul style="list-style-type: none"> n/a 	Medium – high
Upgrades to Blue Mountains Heritage Centre	<ul style="list-style-type: none"> Commission interactive experience designers to provide recommendations for upgrades to the BMHC Apply for funding grants to implement recommendations 	Medium term	<ul style="list-style-type: none"> \$2.25m (design and development) 	Medium – high
Evening Activities	<ul style="list-style-type: none"> Develop marketing strategy including packaging for evening experiences, including packaging the soon to be completed Katoomba Falls Night Walk 	Short term	<ul style="list-style-type: none"> \$100k (marketing) 	Medium
Grand Clifftop Walk	<ul style="list-style-type: none"> Continue to advocate for the completion of the GCTW experience Once completed, develop packages for guided experiences, accommodation and F&B 	Medium – long term	<ul style="list-style-type: none"> \$70k (marketing) n/a (development) 	Medium
Greater Blue Mountains Trail	<ul style="list-style-type: none"> Advocate for the extension of the Greater Blue Mountains Trail Once funding is acquired, undertake development of extensions required 	Long term	<ul style="list-style-type: none"> \$4.5m (development) 	Medium
Knapsack Reserve Trails Hub	<ul style="list-style-type: none"> Complete feasibility study assessing potential to develop the trails hub and various commercial elements which would be synergistic (pop-up café, retail, bike maintenance centre etc.) Determine if a Destination Holiday Park could be established close by to offer the commercial elements Develop EOI for potential operators who may be interested in managing the trails hub 	Medium term	<ul style="list-style-type: none"> \$2m (development) 	Medium
Leura Cascades Upgrades	<ul style="list-style-type: none"> Subject to successful grant funding request, undertake upgrades as proposed 	Medium – long term	<ul style="list-style-type: none"> \$4m (development) 	Medium
Cluster of Major Visitor Recreational Attractions	<ul style="list-style-type: none"> Identify potential sites (old warehouses, vacant sites etc.) which could be used for a major visitor attraction (climbing walls, canopy walkways, zip line and outdoor luge etc.) Develop EOI for potential attraction developers and operators 	Short – medium term	<ul style="list-style-type: none"> \$25m (development) 	Medium
Agritourism	<ul style="list-style-type: none"> Identify potential for developing the Megalong Valley as an agri-tourism hub and assess product enhancements needed along with signage and related infrastructure 	Medium term	<ul style="list-style-type: none"> \$15k (feasibility) \$35k (marketing) 	Low – medium
Bike Station Hire and Trails	<ul style="list-style-type: none"> Complete feasibility study to identify potential models which could be implemented and preferred sites for bike hire/drop off stations If feasible, create EOI for potential bike station hire operators 	Short – medium term	<ul style="list-style-type: none"> \$40k (feasibility) 	Low – medium
Regional Food Experiences	<ul style="list-style-type: none"> Identify product throughout the RSA LGAs which could form a regional food drive trail Develop and market trail via the RSA 	Short – medium term	<ul style="list-style-type: none"> \$15k (as BM contribution for marketing) 	Low – medium
The Gully Indigenous Interpretation Experience	<ul style="list-style-type: none"> Create marketing strategy for The Gully to promote the experience to visitors and locals Work with the BMCC Aboriginal Advisory Council to develop regular tours which visitors can undertake 	Medium term	<ul style="list-style-type: none"> \$20k (marketing) 	Low – medium
Wentworth Falls Lake Upgrades	<ul style="list-style-type: none"> Complete Lake upgrades as per Council plans Identify additional upgrades to enhance the experience such as a pop-up café option, on Lake play equipment etc. 	Medium term	<ul style="list-style-type: none"> \$2.5m (development of additional upgrades¹⁸⁴) 	Low – medium
Antiques/Bric-a-Brac Trails	<ul style="list-style-type: none"> Identify potential operators in the LGA to participate in an antiques/bric-a-brac trail Develop marketing collateral to promote the trail 	Medium term	<ul style="list-style-type: none"> \$20k (marketing) 	Low
Mini “Vivid” Experience	<ul style="list-style-type: none"> Work with Culturescape operators to expand 2018 event¹⁸⁵ and market more extensively via social media strategy and product packaging (accommodation, F&B, transport etc.) 	Short term	<ul style="list-style-type: none"> \$50k (marketing) 	Low

¹⁸⁴ We understand the previously announced Council upgrades have already received funding via the National Stronger Regions Fund so this additional \$2.5m covers new additional upgrades such as the café, on lake play equipment etc.

¹⁸⁵ We note Culturescape 2016/17 is already planned for 17th – 18th February, 2017.

Table 29: Action Plan – Destination Awareness, Branding and Visitor Information

Action	Tasks	Timeframe	Budget Estimates	Priority
Blue Mountains Destination Brand	<ul style="list-style-type: none"> Commission brand designer to work with DMP Reference Group and industry to develop a destination brand and related collateral 	Short term	<ul style="list-style-type: none"> \$150k (feasibility for brand development) 	High
Destination Website	<ul style="list-style-type: none"> After the development of the brand, commission website developer to develop new destination website 	Short term	<ul style="list-style-type: none"> \$50k 	High
Katoomba Station Visitor Information	<ul style="list-style-type: none"> Commission feasibility study looking at visitor information servicing options near Katoomba Station 	Short term	<ul style="list-style-type: none"> \$40k (feasibility) 	High
Regional Strategic Alliance	<ul style="list-style-type: none"> Market and promote the region via the RSA to consumers, industry and community 	Ongoing	<ul style="list-style-type: none"> \$60k (marketing) 	High
Tourism Awareness Campaign	<ul style="list-style-type: none"> Develop tourism awareness campaign to promote the importance of tourism to the community 	Short term	<ul style="list-style-type: none"> \$20k 	High
Blue Mountains Trails App	<ul style="list-style-type: none"> Post brand and website development, commission app developer to create trails app for the Blue Mountains 	Short – medium term	<ul style="list-style-type: none"> \$60k 	Medium
Echo Point VIC Upgrades (Stage 2)	<ul style="list-style-type: none"> Apply for grant funding to plan and develop Stage 2 of Echo Point VIC upgrade 	Short term	<ul style="list-style-type: none"> TBA 	Medium

Table 30: Action Plan – Supporting Infrastructure/Projects

Action	Tasks	Timeframe	Budget Estimates	Priority
Tourism Precinct Development	<ul style="list-style-type: none"> Identify a suitable area for clustering a number of medium – larger scale tourism attractions and facilities 	Short term	<ul style="list-style-type: none"> n/a 	High
Leura Coach Drop Off	<ul style="list-style-type: none"> Implement coach drop off bay as per Council's Leura Bus Strategy 	Short – medium term	<ul style="list-style-type: none"> \$820k (development) 	High
Advocate for 8 Carriage Train Service	<ul style="list-style-type: none"> Continue to advocate for the need for 8 car services and extra mountain bike storage on weekends and public holiday periods 	Ongoing	<ul style="list-style-type: none"> n/a 	Medium – high
Wentworth Falls Parking Improvements	<ul style="list-style-type: none"> Complete a feasibility study assessing strategies for parking improvements at Wentworth Falls such as pay-for-use parking stations 	Short term	<ul style="list-style-type: none"> \$30k (feasibility) 	Medium – high
Coach Layover Hub	<ul style="list-style-type: none"> Commission feasibility to develop coach layover hub near Leura and Katoomba, including preferred sites. Feedback should be sought from major coach touring companies. If feasible, develop coach layover hub 	Medium – long term	<ul style="list-style-type: none"> \$3.5m (feasibility and development) 	Medium
Park and Ride for Day Walks	<ul style="list-style-type: none"> Investigate park and ride options for day walks 	Short - medium term	<ul style="list-style-type: none"> \$25k (feasibility) 	Medium
Signage for the Cultural Centre	<ul style="list-style-type: none"> Introduce additional signage along Katoomba Street and near the station to promote the Cultural Centre 	Short term	<ul style="list-style-type: none"> \$100k (development) 	Medium
Signage Strategy Review	<ul style="list-style-type: none"> Commission review of existing signage strategy and upgrade for directional and interpretative signage 	Medium term	<ul style="list-style-type: none"> \$25k (review) 	Medium
UNESCO World Heritage Entry Signage	<ul style="list-style-type: none"> Investigate options for UNESCO World Heritage entry-gateway signage at various locations 	Medium term	<ul style="list-style-type: none"> \$35k (feasibility) 	Medium
Mustering Areas for Larger Groups	<ul style="list-style-type: none"> Complete study on potential locations and feasibility for introduction of mustering areas at key locations 	Medium term	<ul style="list-style-type: none"> \$30k (feasibility) 	Low – medium



11. SUPPORTING DOCUMENTATION

- 11.1. Supporting Documentation 1 – Consultation List
- 11.2. Supporting Documentation 2 – Literature Review
- 11.3. Supporting Documentation 3 – Visitor Accommodation Type Breakdown
- 11.4. Supporting Documentation 4 – Full Product Audit
- 11.5. Supporting Documentation 5 – Natural World Heritage Sites Comparative Analysis
- 11.6. Supporting Documentation 6 – Great Walks of Australia
- 11.7. Supporting Documentation 7 – Other Potential Commercial Trail Opportunities
- 11.8. Supporting Documentation 8 – Attractions/Destinations Ranking
- 11.9. Supporting Documentation 9 - Tourism Related Planning Principle Concepts
- 11.10. Supporting Documentation 10 – Visitor Forecasts



11.1. Supporting Documentation 1 – Consultation List

Table 31: Consultation List¹⁸⁶

Category	Company Name
Adventure	Eagle Rock Adventures
Adventure	High n Wild Australian Adventures
Adventure	Aboriginal Blue Mountains Walkabout
Adventure	Segway Blue Mountains
Adventure	Andersons Tours
Adventure	Misty Mountain 4WD Tours
Adventure	Australian School of Mountaineering/Paddy Pallin
Adventure	Beyond the Blacktop 4WD Tours
Adventure	Blue Mountains Eco Tours
Adventure	Into The Blue Creative Walks
Adventure	Blue Mountains Horse Riding Adventure Tours
Adventure	Euroka Blue Mountains Equestrian Centre
Adventure	Blue Mountain Bikes Australia
Adventure	Phil's Harley Tours
Adventure	Mt Dan's Adventures
Adventure	Coast Warriors
Adventure	Blue Mountains Adventure Company
Adventure	Blue Mountains History Tours
Adventure	My Adventure Group Pty Ltd
Adventure	Above and Beyond Adventure Company Pty Ltd
Adventure	Allie Pepper Adventures
Adventure	Lifes an adventure
Adventure	Australian Luxury Escapes
Adventure	Wendt On Tours
Adventure	The Great Pyramid Walk Company
Arts & Heritage	Adrian Gilbert Art
Arts & Heritage	Ben Roberts Café and Gallery
Arts & Heritage	Blue Mountains Artist Network
Arts & Heritage	Blue Mountains Association of Cultural Heritage Organisations
Arts & Heritage	Blue Mountains Cultural Centre
Arts & Heritage	Braemar Gallery
Arts & Heritage	BS Glass Art
Arts & Heritage	Day Fine Art
Arts & Heritage	Falls Gallery
Arts & Heritage	Gallery 118
Arts & Heritage	Hart Studio
Arts & Heritage	Hat Hill Gallery
Arts & Heritage	Keith Rowe Glass
Arts & Heritage	Lost Bear Gallery
Arts & Heritage	Loviz Art Gallery & Studio
Arts & Heritage	Mountain Blue Vintage Linen
Arts & Heritage	Mt Victoria & District Museum
Arts & Heritage	MTS MADE
Arts & Heritage	Nolan on Lovel Art Gallery
Arts & Heritage	Norman Lindsay Gallery
Arts & Heritage	Peachtree Antiques
Arts & Heritage	Rex Livingstone Gallery
Arts & Heritage	Springwood Theatre & Hub
Arts & Heritage	Talisman Gallery
Arts & Heritage	Tarella Historic Cottage
Arts & Heritage	The Nook Arts & Crafts
Arts & Heritage	Warragil Studios Blackheath
Arts & Heritage	Wild Valley Art Park
Arts & Heritage	Woodford Academy
Attractions	Aitken's Australia in the Round
Attractions	Blue Mountains Adventure Company
Attractions	Bebeah
Attractions	Blackheath Golf Club
Attractions	Breenhold Gardens
Attractions	Bygone Beauty's Treasured Teapot Museum
Attractions	Campbell Rhododendron Gardens
Attractions	Centennial Glen Stables

Category	Company Name
Attractions	Dryridge Estate
Attractions	Everglades
Attractions	F J Tours
Attractions	Glenbrook Village
Attractions	Kurrajong Radio Museum
Attractions	Leura Golf Club
Attractions	Leuralla Toy & Railway Museum
Attractions	Lilianfels Spa
Attractions	Megalong Valley Farm
Attractions	Mount Tomah Botanic Garden
Attractions	Nanna's Teddys
Attractions	Naroo Gardens
Attractions	Scenic World Blue Mountains
Attractions	Scenic World Blue Mountains
Attractions	Scenic World Blue Mountains
Attractions	Spa Sublime Day Spa
Attractions	Springwood Country Club
Attractions	Edge Cinema, The
Attractions	Valley Height Locomotive Centre
Attractions	Wentworth Falls Country Club
Attractions	Windridge Garden
Attractions	Yengo Sculpture Gardens
Attractions	Yindi Day Spa
Bus/Tour Operators	AAT Kings
Bus/Tour Operators	Gray Line
Dining	Ambermere Rose Inn
Dining	Ashcrofts Bistro
Dining	Bakehouse on Park (Glenbrook)
Dining	Bakehouse on Wentworth
Dining	BMEE
Dining	Bonton Bistro and Wine Bar
Dining	Café Cee
Dining	Canton Palace Wentworth Falls
Dining	Chork Dee Thai Restaurant
Dining	Conservation Hut
Dining	Katoomba Family Hotel and Restaurant
Dining	Katoomba RSL All Services Club
Dining	Leura Garage
Dining	Lindsay Café
Dining	Megalong Valley Tearooms
Dining	Monte's
Dining	Plate Up
Dining	Silk's Brasserie
Dining	Slow Food
Dining	Slow Food Blue Mountains
Dining	Solitary
Dining	Sports Bunkhouse
Dining	Springwood Sports Club
Dining	Starflower Apothecary
Dining	Tamarin Restaurant
Dining	The Lookout Echo Point
Dining	The Paragon Café
Dining	Vesta
Dining	Whisk and Pin
Indigenous	Aboriginal Advisory Council
Major Accommodation	Crockett Group of Hotels
Major Accommodation	Echoes Boutique Hotel and Restaurant
Major Accommodation	Hydro Majestic Hotel Blue Mountains
Major Accommodation	Lilianfels Resort and Spa, Blue Mountains
Major Accommodation	Parklands Country Gardens and Lodges
Major Accommodation	The Carrington
Major Accommodation	Escarpment Group
Retail	Afternoonified
Retail	Australian Alpaca Centre
Retail	Birches of Leura (garden centre)
Retail	Blue Mountains Chocolate Company

¹⁸⁶ Consultation list includes stakeholders who were contacted as part of the consultation process for the DMP. The majority of these stakeholders were identified from Council's database, BMATA's database as well as The Group's own contacts.



Category	Company Name
Retail	Blue Mountains Chocolate Company
Retail	Blue Mountains Cooking School
Retail	Blue Mountains Ugg Boots
Retail	Glenbrook Native Plant Nursery
Retail	Glenbrook Village Gifts and Homewares
Retail	iKOU
Retail	Josophans Fine Chocolates
Retail	Leura Candy Store
Retail	Little Wing
Retail	Loganberry Lane
Retail	Lyttleton Stores
Retail	Megalong Books
Retail	Mr Pickwicks Fine Old Books
Retail	New Age Markets
Retail	Rick Rutherford's Country
Retail	Sanctuary Skin and Beauty
Retail	Skin Deep
Retail	Starflower Apothecary
Retail	Sylph Clothing Designs
Retail	The Candy Store, Leura
Retail	The French Shoppe
Retail	The House of Wool
Retail	The Victory Theatre Antique Centre
Retail	Uplift Fair Trade Shop
Retail	Western Wine Tours
Retail	With Max & Me
Retail	Wollemi Gems
Small Accommodation	3 Explorers Motel
Small Accommodation	3 Sisters Motel and Cottage
Small Accommodation	Alexandra Hotel
Small Accommodation	Alpine Motor Inn
Small Accommodation	AppleBlossom Cottage
Small Accommodation	Argyll Guest House
Small Accommodation	Avonleigh Guest House
Small Accommodation	Best Western Alpine Motor Inn
Small Accommodation	Bethany Manor Bed and Breakfast
Small Accommodation	Better than Grandma's
Small Accommodation	Blackheath Glen Tourist Park
Small Accommodation	Blackheath Holiday Cabins
Small Accommodation	Blackheath Motor Inn
Small Accommodation	Blue Mountains Backpacker Hostel
Small Accommodation	Blue Mountains Cottage
Small Accommodation	Blue Mountains Heritage Motel
Small Accommodation	Blue Mountains Holiday House
Small Accommodation	Blue Mountains Home
Small Accommodation	Blue Mountains Lakeside Bed and Breakfast
Small Accommodation	Blue Mountains Manor House
Small Accommodation	Blue Mountains Rhapsody
Small Accommodation	Blue Mountains Tourist Parks
Small Accommodation	Blue Mountains YHA
Small Accommodation	BM Caravan Parks
Small Accommodation	Brantwood Cottage
Small Accommodation	Bridal Falls Cottage
Small Accommodation	Broomelea
Small Accommodation	Bunderra Blue Bed and Breakfast
Small Accommodation	Bygone Beautys Cottages
Small Accommodation	Cedar Lodge Cabins
Small Accommodation	Chalet Guesthouse and Studio
Small Accommodation	Chez Molle
Small Accommodation	Clanwilliam Blackheath
Small Accommodation	Clarendon Guesthouse
Small Accommodation	Cloudlands Katoomba
Small Accommodation	Comfort Inn Redleaf Resort
Small Accommodation	Corner Manor Leura
Small Accommodation	Crimson Villa
Small Accommodation	Currawong Cottage Blackheath
Small Accommodation	Echo Point Motor Inn
Small Accommodation	Elizabeth Flats
Small Accommodation	Ellengowan
Small Accommodation	Euroka Homestead Farmstay
Small Accommodation	Falls Mountain Retreat Blue Mountains
Small Accommodation	Federation Gardens
Small Accommodation	Gardners Inn
Small Accommodation	Glen Isla Blue Mountains Accommodation
Small Accommodation	Glenella Guest House

Category	Company Name
Small Accommodation	Grevillea Chalet
Small Accommodation	Hawkesbury Heights YHA
Small Accommodation	Hidden Gem/Leura Lady
Small Accommodation	Hideaway Retreat
Small Accommodation	High Mountains Motor Inn
Small Accommodation	Hills Havens
Small Accommodation	Hotel Imperial
Small Accommodation	Jemby Rinjah Eco Lodge
Small Accommodation	Jungle Lodge, Blue Mountains Botanic Gardens, The
Small Accommodation	Kanimbla View Clifftop Retreat
Small Accommodation	Katoomba Christian Convention
Small Accommodation	Katoomba Falls Tourist Park
Small Accommodation	Katoomba Hotel
Small Accommodation	Katoomba Manor
Small Accommodation	Katoomba Town Centre Motel
Small Accommodation	Kihilla Retreat and Conference Centre
Small Accommodation	Kitchen Cottage
Small Accommodation	Kookaburra Retreat
Small Accommodation	Koorawal
Small Accommodation	Kubba Roonga Guesthouse
Small Accommodation	Kurrajong Trails and Cottages
Small Accommodation	Kurrara Historic Guest House
Small Accommodation	La Maison Boutique Hotel
Small Accommodation	Lavender Manor and Majestic
Small Accommodation	Leisure Inn Spires
Small Accommodation	Lemon Peel House
Small Accommodation	Leura Camellias
Small Accommodation	Leura House
Small Accommodation	Leura Rose Cottage
Small Accommodation	Leura Village Fairways Apartment
Small Accommodation	Leurafells
Small Accommodation	Lurline House
Small Accommodation	Lutanda Recreation and Conference Centres - Mount Victoria
Small Accommodation	Megalong Valley Farm
Small Accommodation	Megalong Valley Holiday Cabins
Small Accommodation	Melba House Bed and Breakfast
Small Accommodation	Metropole GH
Small Accommodation	Metropole Katoomba
Small Accommodation	Moments B&B
Small Accommodation	Mottistone Cottage
Small Accommodation	Mount Victoria Manor
Small Accommodation	Mountain Heritage Hotel and Spa Retreat Blue Mountains
Small Accommodation	Nevaeh House
Small Accommodation	Norman Lindsay Cottage
Small Accommodation	Norwood Mountain Lodge
Small Accommodation	Old Leura Dairy
Small Accommodation	Palais Royale
Small Accommodation	Peach Tree Cabin
Small Accommodation	Piccolo Cottage
Small Accommodation	Pioneer Way Motel
Small Accommodation	Poets Cottage
Small Accommodation	Possums Hideaway
Small Accommodation	Rachels Retreat
Small Accommodation	Rose Lindsay Cottage
Small Accommodation	Rosella Cottage Blackheath
Small Accommodation	Royal Hotel Springwood
Small Accommodation	Scenic Cottage
Small Accommodation	Secrets Hideaway
Small Accommodation	Shelton-Lea Bed and Breakfast
Small Accommodation	Sidneys Retreat
Small Accommodation	Silvermere Guesthouse
Small Accommodation	Sirens B&B
Small Accommodation	Six Foot Track Eco Lodge
Small Accommodation	Skyrider Motor inn
Small Accommodation	Sports Bunkhouse
Small Accommodation	St Mounts Boutique Hotel - Garden Cottages and Trattoria Restaurant
Small Accommodation	St Raphael
Small Accommodation	Strawberry Patch Cottage
Small Accommodation	Studio Cottages
Small Accommodation	Dell Blackheath, The
Small Accommodation	Gatsby, The
Small Accommodation	Imperial Hotel Mount Victoria, The



Category	Company Name
Small Accommodation	Tugin Cottage
Small Accommodation	Valley of the Waters Bed and Breakfast
Small Accommodation	Varenda
Small Accommodation	Waldorf Leura Gardens Resort
Small Accommodation	Warrigan
Small Accommodation	Werriberri
Small Accommodation	Whispering Pines Holiday Cottage
Small Accommodation	Wildberg
Small Accommodation	Willow Tree Cottage
Small Accommodation	Windradyne Boutique Bed & Breakfast
Small Accommodation	Woodbridge Homestead and Garden Wing
Small Accommodation	Woolshed Cabins
Small Accommodation	Yester Grange Cottages
State Government	DNSW
State Government	Sydney Trains / Transport for NSW
Tours	Blue Mountains Glow Worm Tours
Tours	Blue Mountains Guides

Category	Company Name
Tours	Blue Mountains Mystery Tours
Tours	Eat Blue Mountains
Tours	F J Tours
Tours	Getabout 4WD Tours
Tours	Lots of Fresh Air
Tours	Rick Rutherford's Country
Tours	Serenity Trike Tours
Tours	Tread Lightly Eco Tours
Tours	Western Wine Tours
Transport	Blue Mountains Trolley Tours
Transport	Blue Mountains Explorer Bus
Transport	Fantastic Aussie Tours
Transport	Transport for NSW
Transport	Transport for NSW
Transport	Transport for NSW



11.2. Supporting Documentation 2 – Literature Review

11.2.1. Blue Mountains DMP 2013

- BMNP has the highest visitation of any national park in Australia (>4 million visitors p.a.)
- Tourism development has traditionally been centred in the various villages rather than in more remote locations
- Currently only a few major built visitor attractions with large capacity to entice visitors to stay longer e.g. Scenic World, Blue Mountains Botanic Gardens, Mt Tomah, Blue Mountains Cultural Centre
- Growth from increasing demand by domestic consumers for more frequent short breaks
- Increasing outbound travel from Asia, especially China
- Need a more refined focus on key experiences that match key market sectors e.g. 'Six Villages Walk', 'Five Valleys' experiences
- Growth internationally expected to come from the experience seeker

11.2.2. Feedback on 2013 DMP

- Lack of evidence and data to support strategic objectives
- Risk management (i.e. bushfires), attracting investment and working with strategic partners have no recommendations/ not addressed
- Lack of information on a product development strategy for the region

11.2.3. Blue Mountains Economic Enterprise

- Mountains Made Maker and Innovation Space – urban revitalisation initiative. Multi-purpose community facility which will be a co-working space (professional work environment for freelancers/small firms/home-based businesses), education space (face-to-face interaction for tertiary students, distance education platforms), and maker space (professional and collaborative facility for artisans, fabricators and designers wishing to grow their business).

11.2.4. Echo Point Matters

11.2.4.1. *Sept 2000 Plan of Management Echo Point*

- Facilities such as parking areas, concrete walkways and toilet blocks dominate the area and contrast with the natural beauty of the BMNP
- Lack of managed visitor flow that adds to the congestion and prevents any personal sense of wonder or intimacy

11.2.4.2. *November 2008 Heritage Impact Statement*

- Physical condition of the Prince Henry Cliff Walk requires upgrades

11.2.4.3. *Echo Point Lookout Approvals Processes for Events & Activities*

- Outlines permissible and prohibited activities at Echo Point

11.2.4.4. *Pay and Display Framework 2016*

- Recommendation that the Council established in 2016-17 an additional Echo Point Pay and Display reserve specifically for long-term asset renewal and that a minimum of \$200,000 of income to be allocated to this reserve annually, as well as any additional income greater than \$700,000 per annum
- Recommendation that the Council note the allocation of \$580,000 over 4 years from the Echo Point Pay and Display reserve for the upgrade of tourism and visitor infrastructure at Echo Point and Katoomba Falls

- Recommendation that the Council investigates the feasibility for expansion of pay and display areas in Katoomba Falls Reserve and surrounds
- Recommendation that Council allocate funding from the new Pay and Display Reserve for Asset Renewal

11.2.4.5. *Echo Point Plan of Management 1995*

- Provides a framework for future development and management of the Echo Point area

11.2.4.6. *Echo Point Katoomba 1988*

- Provides urban design guidelines to ensure that further development in the Echo Point precinct is sympathetic to the predominant character, environmental quality and residential amenity of the area

11.2.5. Infrastructure Developments

11.2.5.1. *Eastern Escarpment Briefing*

- Infrastructure development is not to a standard of a regional asset
- No formalised interconnection between major assets
- Wayfinding/orientation signage is limited and patchy
- State and Commonwealth investment are not maximised

11.2.5.2. *GBM Trail Feasibility Assessment 2010*

- Potential to extend trail to include an off-highway alternative down the mountains to Emu Plains
- Opportunity to create temporary and permanent linkages to a wider network of trails and attractions including events

11.2.5.3. *Southern Scenic Escarpment*

- Grants funding recreational outcomes are limited
- Grants funding economic/employment outcomes are more common with higher return (DNSW Regional Visitor Fund, Tourism Australia T-qual grants, National Stronger Regions Fund)
- Over the next 5 years, Council will spend: \$3.8m on Natural Area Visitor Facilities; \$350k on buildings; \$300k on tourist parks – strong potential to attract external funding for asset renewal/income generating initiatives

11.2.5.4. *Grand Clifftop Walks*

- Outlines various itineraries, lookouts, and maps of walks which can be completed by visitors

11.2.5.5. *Katoomba Civic Centre Proposal June 2016*

- Town centre is built around the main street with pedestrian and vehicle laneways to connect to surrounding streets
- Site surrounded by heritage buildings and new development should be sensitive to heritage identity
- Civic Place has an unwelcoming nature of design, pulling away from the main street
- Laneways have limited pedestrian activity and not realising their potential
- Key concepts used to test development ideas include heart of Katoomba, connect, creative hub, comfortable
- Katoomba Civic Centre rebranded to Katoomba Town Square
- Council has chosen Option A which capitalises on existing planning layout and identity and refurbishment options to create a vibrant open space community space

11.2.6. Leura Bus Parking

- Bus parking a cause for community concern – illegal parking in Megalong St
- Locations for a coach layover hub include: Bloome Park, Leura; and Leura Mall between Craigend Street and Megalong Street.
- Locations for a coach drop off point include: the property at 12-14 Great Western Highway, Leura; The Spires; Grose St (western side); Grose St (southern side); Megalong St (east of Grose St); Railway Parade (northern side); Railway Parade (southern side); Leura Mall (front of The Spires); and Leura Mall between Craigend St and Megalong St.

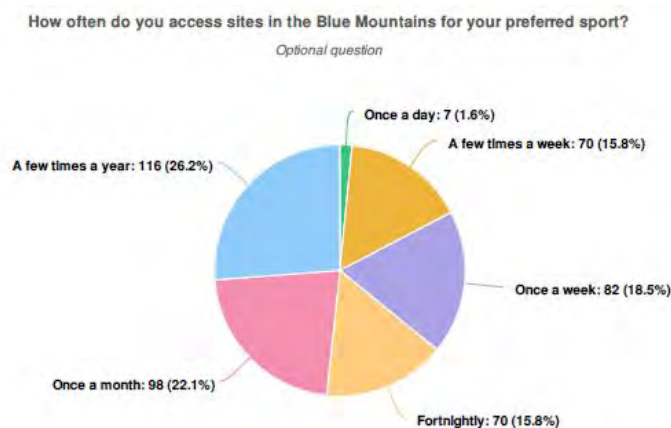
11.2.7. Open Space Recreation Strategy

11.2.7.1. Survey

- Views of bushland and nature were valued by 79% of respondents, followed by the wide variety of bushland walks and trails (58%), and access to facilities that cater for all ages/abilities
- Majority of residents felt the quality of recreation facilities in their area were “okay” (32%) or “good” (46%)
- Most residents frequently used Council facilities were urban bike and footpaths, as well as most using bike trails, walking tracks and bushland reserves monthly
- Walking tracks and bike paths were nominated as a top priority for Council (63%)

11.2.7.2. Cliff Sports - BM

- 63.9% of rock climbers preferred sports climbing, then traditional rock climbing (32.7%)



- 79% Male, 21% Female

11.2.7.3. Mountain Biking - BM

- Priorities for Council maintenance/ investment: general maintenance of trails, signage, accurate maps, provision of facilities around popular trails (e.g. bins, toilets), access to drinking water
- 51% aged 36-50; 34.2% aged 20-35
- 88% male, 12% female

11.2.7.4. ParkScape Survey

- 299 park user intercept interviews were conducted in Echo Point, Glenbrook Park, Katoomba Falls, and Wentworth Falls Lake

11.2.8. Planning Matters

11.2.8.1. *Blackheath Masterplan (Draft)*

- Currently, no designated areas where tourist coaches can stop legally in Blackheath, except at bus stops along the Great Western Highway
- Streetscape improvements should maintain and accentuate the unique identity of Blackheath

11.2.8.2. *Pioneer Place, Katoomba Master Plan: Stage 1*

- Pioneer Place, located within the Katoomba retail precinct is Council owned. The public parking facility provides parking for customers to the Coles/Kmart complex, Katoomba Fair and businesses along Katoomba Street and Pioneer Place.
- The Master Plan aims to: improve the safety and accessibility of Pioneer Place for pedestrians and cyclists; improve the manoeuvrability for vehicles by reconfiguring parking design; improve the functionality of Pioneer Place through redesign; and improve the amenity of Pioneer Place.

11.2.8.3. *Pioneer Place Katoomba: Stage 2 Public Domain Master Plan, 2015*

- The Master Plan considers traffic and circulation, pedestrian safety and amenity, parking efficiency, and urban design principles.
- Site analysis and issues: College Lane; Little User Amenity and Lack of Pedestrian Connectivity; Building Car Park Interface; Pedestrian Crossing – Katoomba; Pedestrian Vehicular Conflicts; Inactive Property Frontages; Parking not to Standard – No Allowance for Deliveries; Lack of Pedestrian Connectivity; Harsh Bland Building Façade and Poor Pedestrian Amenity; Poorly Located Pedestrian Linkage; Stark Pedestrian Linkage with Poor subsurface Drainage; Conflict Between Trees and Pedestrian Surface; Traffic Stacking Issues; Davies Lane; Pryor Place; Penny Lane; Pedestrian Zone along Big W & Woolworths eastern façade; Step Balustrade; and Community Bus Access.

11.2.8.4. *Tourist Zone & Other Sites March 2016*

- Recommendation that council receives a report and Planning Proposal on the introduction of a SP3 Tourist Zone for LEP 2015 and suite of permissible uses; suitable sites; and other sites considered during exhibition are considered suitable for rezoning for the purpose of supporting tourism

11.2.8.5. *Katoomba Charrette Outcomes Report & Town Centre Revitalisation Strategy 1999*

- Charrette held to clarify a vision for the Katoomba Town Centre; improve business, improve access for pedestrians and cars, upgrade Katoomba's built heritage; achieve more sustainable development; generate new business and employment in Katoomba and to develop proposals for 8 key sites.

11.2.8.6. *Summary of Key Changes to Current Blue Mountains LEPs*

- Zoning changes such as a new business zone for the Blue Mountains Business Park and 33 Railway Parade Hazelbrook being rezoned to Neighbourhood centre
- Outlines various land use changes and development standard changes

11.2.9. Tourist Parks

11.2.9.1. *Tourist Parks Business Case*

- Opportunities to increase caravan participation rates amongst Asian born and culturally linked Australian residents, as well as international Asian visitors

- Online retailing presents both an opportunity and challenge for the caravan industry

11.2.9.2. *Marketing Plan for Blue Mountains City Council Caravan Parks October 2010*

- Provides marketing actions for Council to strategically market the caravan parks and maximise their potential

11.2.10. Tourism-related Documents

11.2.10.1. *BMCC Presentation prepared for DNSW – Forum on future on RTOs*

- Council spent \$4.75 m in upgrading, renewing and developing natural areas visitor facilities in the past 10 years (excluding staff and maintenance costs)
- Challenge: sufficient funding and upgrade of visitor infrastructure
- Challenge: keeping pace with new technologies such as introduction of QR codes, digital apps, GPS tracking
- Challenge: keeping pace with legislative accessibility requirements, hearing impaired requirements, cultural and linguistic requirements such as squat toilet, ablution needs to meet changing visitor markets (e.g. India, Asia).

11.2.10.2. *Tourism Statement – BMCC*

- Challenge: Limited new and enhanced tourism products
- Challenge: Funds to maintain and renew visitor infrastructure
- Challenge: Capacity of current infrastructure to support visitation growth
- Challenge: Limited access to Arts funding
- Opportunity: State and Federal Government funding of visitor infrastructure upgrades
- Opportunity: Aboriginal cultural tourism initiatives
- Iconic multi-day trails are a niche product experiencing strong domestic and international growth and high returns
- Support expanding the existing User Pays system to fund visitor infrastructure
- Review Crown Lands contribution to tourism including unlocking Crown Lands for tourism use

11.2.10.3. *Proposed Regional Tourism Initiatives*

- Proposal by the RSA for the formation of a regional tourism entity for Blue Mountains City Council, Hawkesbury City Council and Penrith City Council
- Recommendation for Council to endorse the renewal of Blue Mountains City Council's tourism image and video library

11.2.10.4. *Event Audit (LGA wide)*

- List of 2015 events

11.2.10.5. *Visitor Information Centre Statistics*

- Statistics for Echo Point and Glenbrook VICS

11.2.10.6. *Greater Sydney Commission Project List*

- List of projects and their cost

11.2.10.7. *Public Art Policy*

- Policy to enhance the natural and built assets of the Blue Mountains and to reflect its character, history and future aspirations

11.2.10.8. Regional Tourism Statement Statistics

- Blue Mountains has largest forecasted visits compared with Hawkesbury and Penrith LGAs
- Tourism output currently accounts for 4% of total regional output and tourism employment currently accounts for 5% across the region

11.2.11. Greater Blue Mountains Trail

- Map of the Trail and Related Information
- Priority 1 project as listed by the State Government Sydney Regional Recreation Trails Framework

11.2.12. Economic Strategy (due for completion 2017)

11.2.12.1. Discussion Paper

- Opportunity to promote environmental benefits and associated 'clean, green' brand
- Threat – other areas of Greater Western Sydney have established facilities in health, education and recreation
- Threat – other areas of Greater Western Sydney offer relatively inexpensive and investment opportunity with greater locational advantages
- Promotion of competing tourist areas e.g. Hunter and Illawarra
- Rate of growth in employment projected to decline relative to previous 5 years
- 13% of all jobs attributed to tourism
- State's tourism data suggests a growth rate as high as 50% may be driving the tourism sector

11.2.12.2. Roundtable 2016

- Poor capitalisation of World Heritage listing
- Jobs in BM v other areas – not secure e.g. seasonal jobs
- 15-24-year-old market cannot find jobs – problems with retaining youth
- Need entry signage "Welcome To"
- Threat – communicating with Asian tourism market (China) -other areas are ahead and more international
- Threat - capacity – parking at Leura, Echo Point, Wentworth Falls
- Threat – Staffing food and accommodation services
- Threat – Lack of take-up in hospitality, tourism and events training
- Threat – Not having unified tourism peak body (affects branding and communications)
- Threat – No police patrols on trains at night beyond Penrith

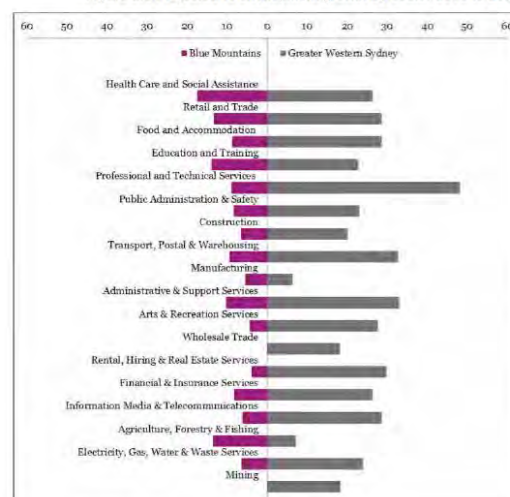


Table 2.1 Four Year Annual Average Tourism Data 2010 to 2014

	Blue Mountains LGA	NSW
Total visitors (domestic and international)	1,783,000	80,316,000
Domestic day trip	1,317,000	52,212,000
Domestic overnight	418,000	25,194,000
Percentage of visitors staying over night	24%	33%
Spend per day trip visitor	\$87	\$106
Spend per overnight visitor	\$384	\$574
International	48,000	2,910,000
Percentage of international visitors	3%	4%
International visitor spend per a visitor	\$483	\$2,229

Source: Destination NSW Blue Mountains LGA Profile 2015

Figure 2.3 Projected % employment growth by sector 2016 to 2026



Source: NSW Bureau of Transport (2014)

11.2.13. Nature Based Recreation Strategy

- 52% of visitors to BM participate in nature tourism. Most coming from backpacker market, domestic market. Most non-nature tourists come from the international market.
- Lack of integrated management framework and limited resources – council structure more suited for intensive management of limited areas
- Unapproved Development of new sites – resulting in social crowding, pollution, lack of formal parking



11.2.14. Nature Based Recreation Strategy Licensing Scheme

Categories of Licence	Total Fee (Including GST)	Comments
Annual Licence		
Initial licence application fee (one off) for use of Council land for organised nature based recreation <i>including</i> abseiling and horseback riding	\$2,300.00 Except educational institutions: \$290	Valid from 1 September for 12 months Generally for all other activities
Initial licence application fee (one off) for use of Council land for organised nature based recreation <i>excluding</i> abseiling and horseback riding	\$290.00	Valid from 1 September for 12 months Generally for all other activities
Annual renewal licence application fee for all nature based recreation activities	\$290.00	This is for renewal of an existing valid licence only Valid from 1 September for 12 months
Half day use fee - per person	\$2.25	Half day is equivalent to 0 - 4 hours
Whole day use fee - per person	\$4.50	Whole day classified as 4 - 24 hours
Casual Use Licence		
One Day Casual Licence	\$52.00	Maximum of 6 permits issued to any one organisation per year Maximum of 20 people per permit
Half day use fee - per person	\$2.25	Half day is equivalent to 0 - 4 hours
Whole day use fee - per person	\$4.50	Whole day classified as 4 - 24 hours
Special Events Licence		
Special Events Licence	\$155.00	Groups greater than 20 Maximum group size and number of trips per year is at the discretion of the Environmental Manager
Half day use fee - per person	\$2.25	Half day is equivalent to 0 - 4 hours
Whole day use fee - per person	\$4.50	Whole day classified as 4 - 24 hours

11.2.15. Blue Mountains Heritage Strategy 2014-2017

- Recommendation: Introduce a local heritage incentives fund to provide small grants to encourage local heritage projects – investigate additional funding e.g. local businesses, Blue Mountains Lithgow and Oberon Tourism (BMLot)
- Recommendation: Continue a main street program approach for town centres – e.g. provide and maintain amenities in town centres, continue the redevelopment of laneway connections in Katoomba Town Centre.
- Recommendation: Present educational and promotional programs – develop fixed and temporary heritage exhibits for Blue Mountains Cultural Centre, supplement heritage information brochures, websites and guidelines

11.2.16. Blue Mountains Cultural Strategy 2006

- Natural and cultural heritage in BM attracts > 3 million visitors p.a.
- Low level of full-time employment in cultural occupations – many live in the Mountains, but have to find work elsewhere
- Activity levels in arts festivals, art & craft markets and community cultural development in the BM far exceed overall levels in NSW
- High per capita ratio of privately operated art galleries and art studios
- Local audiences are reliable for amateur theatre productions and visiting classical musical performances but inconsistent for contemporary musical performance
- Aboriginal population and people of culturally and linguistically diverse backgrounds (CALD) in the BM are small in number relative to Western Sydney and other metropolitan areas of Australia – as such, difficult to attract high levels of state/federal funding for Community Cultural Development projects in the Blue Mountains



11.3. Supporting Documentation 3 – Visitor Accommodation Type Breakdown

Table 32: Blue Mountains Accommodation Type (by Visitor Nights)¹⁸⁷

Estimated Accommodation Type							
	International Nights	%	Domestic Nights	%	Total	%	Type
Private Accommodation	88k	34%	342k	35%	430k	35%	Private
Hotel, Motel, Resort	43k	16%	233k	24%	276k	22%	Commercial
Rented House/Apartment	34k	13%	142k	15%	176k	14%	Private
Backpacker/Hostel	25k	10%			25k	2%	Commercial
Caravan	24k	9%			24k	2%	Commercial
Guest house/B&B			76k	8%	76k	6%	Commercial
Own property (holiday home)			53k	5%	53k	4%	Private
Other/not stated	47k	18%	130k	13%	177k	14%	Private
	261k		976k		1.2m		
Totals							
Commercial	92k	35%	309k	32%	401k	32%	
Private	169k	65%	667k	68%	836k	68%	
	261k		976k		1.2m		
Applying the Above Split to Visitor Nights Data							
	2012	2013	2014	2015	%		
International Nights	266k	256k	273k	316k			
Commercial	94k	90k	96k	112k	35%		
Private	172k	166k	177k	205k	65%		
Domestic Nights	993k	959k	1.0m	1.2m			
Commercial	314k	304k	323k	375k	32%		
Private	679k	655k	698k	809k	68%		
Total Visitor Nights	1.3m	1.2m	1.3m	1.5m			
Commercial	408k	394k	419k	486k	32%		
Private	850k	821k	874k	1.0m	68%		

¹⁸⁷ Based on a special data request from as well as accommodation use breakdown provided in LGA Profile – Blue Mountains (4 Year Annual Average to year ending September 2014), DNSW as well as The Group's own estimations based on work in the LGA.



11.4. Supporting Documentation 4 – Full Product Audit

Table 33: Full Accommodation Audit in Blue Mountains LGA

LGA	Type	Property Name	Number of Rooms	Number of Caravan Sites	Number of Camping Sites
Blue Mountains LGA	B&B	Metropole Katoomba	24		
Blue Mountains LGA	B&B	Broomlea B&B	5		
Blue Mountains LGA	B&B	Mountainside B&B	3		
Blue Mountains LGA	B&B	Shelton-Lea B&B	4		
Blue Mountains LGA	B&B	The Greens of Leura Bed and Breakfast	5		
Blue Mountains LGA	B&B	Norwood Mountain Lodge	7		
Blue Mountains LGA	B&B	Lurline House	7		
Blue Mountains LGA	B&B	Silvermere	6		
Blue Mountains LGA	B&B	Sirens Bed & Breakfast	4		
Blue Mountains LGA	B&B	Storey Grange	4		
Blue Mountains LGA	B&B	Bethany Manor	4		
Blue Mountains LGA	B&B	Katoomba Manor	4		
Blue Mountains LGA	B&B	Moments Mountain Retreat	4		
Blue Mountains LGA	B&B	Valley of the Waters	3		
Blue Mountains LGA	B&B	Windradyne Boutique Bed & Breakfast	3		
Blue Mountains LGA	B&B	Woodford of Leura Bed & Breakfast	3		
Blue Mountains LGA	Backpackers	Blue Mountains YHA - Hostel	57		
Blue Mountains LGA	Backpackers	Blue Mountains Backpacker Hostel	31		
Blue Mountains LGA	Backpackers	Katoomba Mountain Lodge	18		
Blue Mountains LGA	Backpackers	No. 14	11		
Blue Mountains LGA	Backpackers	The Flying Fox Backpackers	6		
Blue Mountains LGA	Cabins	Blackheath Holiday Cabins	-		
Blue Mountains LGA	Cabins	Sidney's Retreat	-		
Blue Mountains LGA	Cabins	Jemby-rinjah Eco Lodge	30		
Blue Mountains LGA	Cabins	Federation Gardens & Possums Hideaway	17		
Blue Mountains LGA	Cabins	Cedar Lodge Cabins	9		
Blue Mountains LGA	Caravan Park/School Camp	Katoomba Christian Convention Centre	56	20	30
Blue Mountains LGA	Caravan Park/School Camp	CMS Conference Centre	36		
Blue Mountains LGA	Caravan Park/School Camp	Lakeview Holiday Park	11		
Blue Mountains LGA	Caravan Park/School Camp	Lutanda Mount Victoria - School, Church and Respite Camps	21		
Blue Mountains LGA	Caravan Park/School Camp	Blackheath Glen Tourist Park (Council owned)	12	34	25
Blue Mountains LGA	Caravan Park/School Camp	Katoomba Falls Caravan Park (Council owned)	11	29	21
Blue Mountains LGA	Cottage	Rosella Cottage	-		
Blue Mountains LGA	Cottage	Arcadia Cottage	-		
Blue Mountains LGA	Cottage	Katoomba Townhouses	-		



LGA	Type	Property Name	Number of Rooms	Number of Caravan Sites	Number of Camping Sites
Blue Mountains LGA	Cottage	Rose Lindsay Cottage	2		
Blue Mountains LGA	Cottage	Brantwood Cottage	-		
Blue Mountains LGA	Cottage	Bridal Falls Cottage	-		
Blue Mountains LGA	Cottage	Bygone Beautys Cottages	6		
Blue Mountains LGA	Cottage	Cherry Tree Cottage	-		
Blue Mountains LGA	Cottage	Cloudlands	-		
Blue Mountains LGA	Cottage	Cottage on the Mall	-		
Blue Mountains LGA	Cottage	Dryridge Estate Holiday Accommodation	-		
Blue Mountains LGA	Cottage	Forget Me Not Cottage	-		
Blue Mountains LGA	Cottage	Leura Rose Cottage	-		
Blue Mountains LGA	Cottage	Mileston Cottage	-		
Blue Mountains LGA	Cottage	Montrose House	-		
Blue Mountains LGA	Cottage	St Raphael	-		
Blue Mountains LGA	Cottage	Strawberry Patch Cottage	2		
Blue Mountains LGA	Cottage	The Jungle Lodge	4		
Blue Mountains LGA	Cottage	The Weavers Studio	-		
Blue Mountains LGA	Cottage	Varena Luxury Accommodation	1		
Blue Mountains LGA	Cottage	Warrigan	-		
Blue Mountains LGA	Cottage	Wentworth Cottage	-		
Blue Mountains LGA	Cottage	Leura Lady	-		
Blue Mountains LGA	Cottage	The Hidden Gem	9		
Blue Mountains LGA	Cottage	Old Leura Dairy	6		
Blue Mountains LGA	Cottage	Piccolo	4		
Blue Mountains LGA	Cottage	The Kitchen Cottage	3		
Blue Mountains LGA	Cottage	Leura Camellias	3		
Blue Mountains LGA	Cottage	Crimson Villa	2		
Blue Mountains LGA	Cottage	Hills Havens	2		
Blue Mountains LGA	Guest House	Corner Manor Leura	-		
Blue Mountains LGA	Guest House	Clarendon Guest House	30		
Blue Mountains LGA	Guest House	The Victoria & Albert Guest House	20		
Blue Mountains LGA	Guest House	Blue Mountains Manor House	16		
Blue Mountains LGA	Guest House	Leura House	15		
Blue Mountains LGA	Guest House	Cascades Manor	-		
Blue Mountains LGA	Guest House	Kanimbla View Clifftop Retreat	3		
Blue Mountains LGA	Guest House	Lavender Majestic	-		
Blue Mountains LGA	Guest House	Lavender Manor	-		
Blue Mountains LGA	Guest House	Rachels Retreat	-		
Blue Mountains LGA	Guest House	Glenella Guest House	6		
Blue Mountains LGA	Guest House	Jamison Guest House	4		
Blue Mountains LGA	Guest House	Hotel Avonleigh	12		
Blue Mountains LGA	Guest House	Kurrara Historic Guest House	8		
Blue Mountains LGA	Guest House	Belgravia Mountain Guest House	7		
Blue Mountains LGA	Guest House	Chalet Blue Mountains	7		
Blue Mountains LGA	Guest House	Kubba Roonga Guest House	5		
Blue Mountains LGA	Hotel	Fairmont Resort Blue Mountains - MGallery Collection	210		



LGA	Type	Property Name	Number of Rooms	Number of Caravan Sites	Number of Camping Sites
Blue Mountains LGA	Hotel	Lilianfels Blue Mountains Resort & Spa	85		
Blue Mountains LGA	Hotel	The Carrington Hotel	63		
Blue Mountains LGA	Hotel	The Hydro Majestic Hotel	60		
Blue Mountains LGA	Hotel	Comfort Inn Redleaf Resort	46		
Blue Mountains LGA	Hotel	Mountain Heritage Hotel & Spa Retreat	41		
Blue Mountains LGA	Hotel	Palais Royale	40		
Blue Mountains LGA	Hotel	Parklands Country Garden & Lodges	28		
Blue Mountains LGA	Hotel	Hotel Blue & Conference Centre	25		
Blue Mountains LGA	Hotel	Gardners Inn Hotel	25		
Blue Mountains LGA	Hotel	The Hideaway Retreat	20		
Blue Mountains LGA	Hotel	La Maison Boutique Hotel	18		
Blue Mountains LGA	Hotel	Grand View Hotel	17		
Blue Mountains LGA	Hotel	Echoes Boutique Hotel and Restaurant	14		
Blue Mountains LGA	Hotel	St Mounts Boutique Hotel	9		
Blue Mountains LGA	Hotel	Royal Hotel Springwood	9		
Blue Mountains LGA	Motel	Waldorf Leura Gardens Resort	60		
Blue Mountains LGA	Motel	Hotel Gearin	45		
Blue Mountains LGA	Motel	Rest Easy Motel	36		
Blue Mountains LGA	Motel	Echo Point Motor Inn	36		
Blue Mountains LGA	Motel	Katoomba Town Centre Motel	34		
Blue Mountains LGA	Motel	New Ivanhoe Hotel	-		
Blue Mountains LGA	Motel	Blue Mountains Budget Accommodation	11		
Blue Mountains LGA	Motel	Blue Mountains Heritage Motel	34		
Blue Mountains LGA	Motel	Hotel Imperial Mount Victoria	30		
Blue Mountains LGA	Motel	Best Western Alpine Motor Inn	25		
Blue Mountains LGA	Motel	Sky Rider Motor Inn	24		
Blue Mountains LGA	Motel	Blue Mountains G'day Motel	24		
Blue Mountains LGA	Motel	3 Sisters Motel and Cottage	21		
Blue Mountains LGA	Motel	High Mountains Motor Inn	21		
Blue Mountains LGA	Motel	Pioneer Way Motel	20		
Blue Mountains LGA	Motel	Blackheath Motor Inn	19		
Blue Mountains LGA	Motel	The 3 Explorers Motel	15		
Blue Mountains LGA	Motel	Alexandra Hotel	9		
Blue Mountains LGA	Motel	Quality Inn St. Mounts	9		
Blue Mountains LGA	Serviced Apartments	Leisure Inn Spires	39		
Blue Mountains LGA	Serviced Apartments	Falls Mountain Retreat	30		
Blue Mountains LGA	Serviced Apartments	Echo Point Holiday Village	8		
Blue Mountains LGA	Serviced Apartments	Whispering Pines Chalet & Cottages	5		
Blue Mountains LGA	Serviced Apartments	Secrets Hideaway	3		

Table 34: Full Attraction Audit in Blue Mountains LGA

LGA	Type	Name
Blue Mountains LGA	Adventure Tour Company	High n' Wild Australian Adventures
Blue Mountains LGA	Adventure Tour Company	Beyond the Blacktop 4WD Tours
Blue Mountains LGA	Adventure Tour Company	Blue Mountains 4WD
Blue Mountains LGA	Adventure Tour Company	Blue Mountains Adventure Company
Blue Mountains LGA	Adventure Tour Company	River Deep Mountain High
Blue Mountains LGA	Adventure Tour Company	Tread Lightly Eco Tours
Blue Mountains LGA	Adventure Tour Company	Blue Mountains Guides
Blue Mountains LGA	Adventure Tour Company	Wilderness Adventures
Blue Mountains LGA	Adventure Tour Company	Australian School of Mountaineering
Blue Mountains LGA	Art & Culture	Blue Mountains Cultural Centre
Blue Mountains LGA	Art & Culture	The Glass Gallery
Blue Mountains LGA	Art & Culture	Lost Bear Gallery
Blue Mountains LGA	Art & Culture	NSW Toy & Railway Museum
Blue Mountains LGA	Art & Culture	Mount Victoria & District Historical Society Museum
Blue Mountains LGA	Art & Culture	Valley Heights Locomotive Depot Heritage Museum
Blue Mountains LGA	Art & Culture	Hat Hill Gallery
Blue Mountains LGA	Art & Culture	Falls Gallery
Blue Mountains LGA	Art & Culture	Norman Lindsay Gallery
Blue Mountains LGA	Art & Culture	Wild Valley Art Park
Blue Mountains LGA	Art & Culture	Adrian Gilbert Art
Blue Mountains LGA	Art & Culture	Hart Ceramics
Blue Mountains LGA	Art & Culture	Woodford Academy
Blue Mountains LGA	Art & Culture	Bygone Beauty's Treasured Teapot Museum and Tearooms
Blue Mountains LGA	Art & Culture	Aitkens Australia in the Round
Blue Mountains LGA	Art & Culture	Day Fine Art
Blue Mountains LGA	Art & Culture	Street Art Walk - Street Art Murals Australia
Blue Mountains LGA	Art & Culture	Waradah Aboriginal Centre
Blue Mountains LGA	Art & Culture	Rick Rutherfords Country Gallery
Blue Mountains LGA	Bushwalk (Self-Guided)	Knapsack Gully Viaduct
Blue Mountains LGA	Bushwalk (Self-Guided)	Lapstone Zig Zag/Knapsack Gully Viaduct
Blue Mountains LGA	Bushwalk (Self-Guided)	National Park Glenbrook Entrance/Euroka Picnic Area
Blue Mountains LGA	Bushwalk (Self-Guided)	Euroka Creek/Nepean River
Blue Mountains LGA	Bushwalk (Self-Guided)	National Park Glenbrook Entrance/Red Hands Cave
Blue Mountains LGA	Bushwalk (Self-Guided)	Jellybean Pool or Blue Pool
Blue Mountains LGA	Bushwalk (Self-Guided)	Florabella Pass
Blue Mountains LGA	Bushwalk (Self-Guided)	Jack Evans Track (Erskine Creek)
Blue Mountains LGA	Bushwalk (Self-Guided)	Madoline Glen/Birdwood Gully
Blue Mountains LGA	Bushwalk (Self-Guided)	Springwood/Sassafras Gully/Victory Track/Faulconbridge
Blue Mountains LGA	Bushwalk (Self-Guided)	Dantes Glen/Empire Pass/Frederica Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	South Lawson Waterfall Circuit
Blue Mountains LGA	Bushwalk (Self-Guided)	Charles Darwin Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Rocket Point
Blue Mountains LGA	Bushwalk (Self-Guided)	Weeping Rock/Queens Cascade
Blue Mountains LGA	Bushwalk (Self-Guided)	Princes Rock Lookout
Blue Mountains LGA	Bushwalk (Self-Guided)	Den Fenella



LGA	Type	Name
Blue Mountains LGA	Bushwalk (Self-Guided)	Valley of the Waters Nature Track
Blue Mountains LGA	Bushwalk (Self-Guided)	Valley of the Waters/Lilians Glen/Inspiration Point
Blue Mountains LGA	Bushwalk (Self-Guided)	Overcliff/Undercliff/National Pass/Valley of the Waters
Blue Mountains LGA	Bushwalk (Self-Guided)	Valley of the Waters/Wentworth Pass/National Park
Blue Mountains LGA	Bushwalk (Self-Guided)	Sublime Point Lookout
Blue Mountains LGA	Bushwalk (Self-Guided)	Gordon Falls to Leura Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	Leura Cascades to Bridal Veil Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	Lyrebird Dell/Pool of Siloam
Blue Mountains LGA	Bushwalk (Self-Guided)	Leura Cascades Round Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Lockley Pylon
Blue Mountains LGA	Bushwalk (Self-Guided)	Leura Cascades/Leura Forest/Fern Bower Circuit
Blue Mountains LGA	Bushwalk (Self-Guided)	Three Sisters Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Echo Point/Prince Henry Cliff Walk/Katoomba Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	Katoomba Falls/Cliff View Lookout
Blue Mountains LGA	Bushwalk (Self-Guided)	Boars Head Rock/Cahill Lookout
Blue Mountains LGA	Bushwalk (Self-Guided)	Echo Point/Prince Henry Cliff Walk/Gordon Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	Katoomba Falls/Furber Steps/Scenic Railway
Blue Mountains LGA	Bushwalk (Self-Guided)	Katoomba Falls Round Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Minnehaha Falls
Blue Mountains LGA	Bushwalk (Self-Guided)	Giant Stairway/Dardanelles Pass/Leura Forest/Federal Pass/Giant Stairway
Blue Mountains LGA	Bushwalk (Self-Guided)	Furber Steps/Ruined Castle/Golden Stairs
Blue Mountains LGA	Bushwalk (Self-Guided)	Explorers Tree/Old Reserve via Six Foot Track
Blue Mountains LGA	Bushwalk (Self-Guided)	Six Foot Track/Katoomba to Jenolan Caves
Blue Mountains LGA	Bushwalk (Self-Guided)	Fairfax Heritage Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Govetts Leap/Evans Lookout
Blue Mountains LGA	Bushwalk (Self-Guided)	Govetts Leap/Pulpit Rock
Blue Mountains LGA	Bushwalk (Self-Guided)	Govetts Leap/Braeside Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Neates Glen/Grand Canyon
Blue Mountains LGA	Bushwalk (Self-Guided)	Centennial Glen/Porters Pass
Blue Mountains LGA	Bushwalk (Self-Guided)	Popes Glen/Govetts Leap
Blue Mountains LGA	Bushwalk (Self-Guided)	Walls Cave Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Perrys Lookdown/Blue Gum Forest
Blue Mountains LGA	Bushwalk (Self-Guided)	Evans Lookout/Beauchamp Falls/Junction Rock/Govetts Leap
Blue Mountains LGA	Bushwalk (Self-Guided)	Pierces Pass/Grose Valley
Blue Mountains LGA	Bushwalk (Self-Guided)	Coachwood Glen
Blue Mountains LGA	Bushwalk (Self-Guided)	Fairy Bower/Coxs Cave/Mt Piddington
Blue Mountains LGA	Bushwalk (Self-Guided)	Berghofers Pass
Blue Mountains LGA	Bushwalk (Self-Guided)	Coxs Road/Nature Walk
Blue Mountains LGA	Bushwalk (Self-Guided)	Lawsons Long Alley/Lockyers Loop Road
Blue Mountains LGA	Bushwalk (Self-Guided)	Victoria Falls Lookout/Burra Korain Flat
Blue Mountains LGA	Bushwalk (Self-Guided)	Cathedral of Ferns
Blue Mountains LGA	Bushwalk (Self-Guided)	Mount Banks Walk
Blue Mountains LGA	Day Spa	Sanctuary Skin & Beauty
Blue Mountains LGA	Day Spa	Spa Sublime Day Spa
Blue Mountains LGA	Day Spa	Hamilton Spa
Blue Mountains LGA	Day Spa	Lilianfels Spa



LGA	Type	Name
Blue Mountains LGA	Day Spa	Thai Lotus Massage & Day Spa
Blue Mountains LGA	Day Spa	Renaissance Spa at The Carrington
Blue Mountains LGA	Day Spa	Ubika Spa
Blue Mountains LGA	Day Spa	Three Sisters Thai Massage Boutique
Blue Mountains LGA	Day Spa	Blue Mountains Massage & Spa
Blue Mountains LGA	Day Spa	The Massage Health Clinic
Blue Mountains LGA	Day Spa	Yindi Day Spa
Blue Mountains LGA	F&B Experience	Dryridge Estate Wines
Blue Mountains LGA	F&B Experience	Western Wine Tours
Blue Mountains LGA	F&B Experience	D'Vine Cellars
Blue Mountains LGA	F&B Experience	Carrington Cellars
Blue Mountains LGA	Gardens/Garden Tours	TPC Garden Tours
Blue Mountains LGA	Gardens/Garden Tours	Blue Mountains Botanic Gardens, Mount Tomah
Blue Mountains LGA	Gardens/Garden Tours	Breenhold Gardens
Blue Mountains LGA	Gardens/Garden Tours	Leuralla Gardens
Blue Mountains LGA	Health & Fitness	Starflower Apothecary
Blue Mountains LGA	Health & Fitness	Springwood Aquatic & Fitness Centre
Blue Mountains LGA	Gardens/Garden Tours	Everglades Historic House and Gardens
Blue Mountains LGA	Gardens/Garden Tours	Nooroo Gardens
Blue Mountains LGA	Heritage	Lennox Bridge
Blue Mountains LGA	Mountain Biking Tour Company	Flying Fox
Blue Mountains LGA	Mountain Biking Rental Company	Blue Mountain Bikes
Blue Mountains LGA	Mountain Biking (Self-Guided)	Woodford - Oaks Trail
Blue Mountains LGA	Mountain Biking (Self-Guided)	Faulconbridge Point Lookout
Blue Mountains LGA	Mountain Biking (Self-Guided)	Blue Gum Swamp
Blue Mountains LGA	Mountain Biking (Self-Guided)	Narrow Neck
Blue Mountains LGA	Mountain Biking (Self-Guided)	McMahon's Point Ride
Blue Mountains LGA	Mountain Biking (Self-Guided)	Knapsack Reserve
Blue Mountains LGA	Mountain Biking (Self-Guided)	Andersons Trail
Blue Mountains LGA	Recreation	Wentworth Falls Lake
Blue Mountains LGA	Recreation	Scenic World Blue Mountains
Blue Mountains LGA	Recreation	Megalong Valley Farm
Blue Mountains LGA	Recreation	Wentworth Falls Country Club
Blue Mountains LGA	Recreation	Springwood Country Club
Blue Mountains LGA	Recreation	Leura Golf Club
Blue Mountains LGA	Recreation	Blackheath Golf Club

Table 35: Full Event Audit in Blue Mountains LGA¹⁸⁸

Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Blue Mountains Arts Trail	Various locations in BM	September	19-Sep-15	20-Sep-15	w/end	Annual	Art				
Blackheath Rhodo Art Show	Blackheath Community Centre	Oct-Nov	30-Oct-15	08-Nov-15	Both	Annual	Art				
Woodford Reserve Art Walk	Woodford	March	21-Mar-15	21-Mar-15	w/end	One Off	Art				
Panel Discussion – Blue Mountains Cultural Centre	BM Cultural Centre	June	11-Jun-15	11-Jun-15	MidWk	One off	Art				
Winter Magic Art Street	Shops in Katoomba Street	June	20-Jun-15	20-Jul-15	Both	Annual	Art				
The Blue Mountains Winter Arts Trail	Various locations in BM	July	18-Jul-15	19-Jul-15	w/end	Annual	Art				
Springwood Art Show		August				Annual	Art				
Harry Potter Day at Woodford Academy	Woodford Academy	February	07-Feb-15	07-Feb-15	w/end	One Off	Art				
Ride your Heart Out (Bike Ride/fundraiser)	Melrose Park to Westmead	March	08-Mar-15	08-Mar-15	w/end	Transit	Bike Ride	50			ON Road
Zoo 2 Zoo Black Dog Institute Lunch for Riders	Jackson Res, Springwood and Wentworth Falls Lake	October	16-Oct-15	16-Oct-15	Fri	One Off	Bike Ride	70			On Road
Freedom Ride	Echo Point Precinct	November	28-Nov-15	28-Nov-15	w/end	One Off	Bike Ride				On Road
Cameron Burke Memorial Hotrod Show	Springwood Country Club	June	07-Jun-15	07-Jun-15	W/end	Annual	Car show	3,000	60%	40%	TMP
C3 Christmas in the Park Glenbrook	Glenbrook Park	December	12-Dec-15	12-Dec-15	w/end	Annual	Carols/Christmas				
BM City Church Carols Mt Riverview	Reservoir Park, Mt Riverview	December	12-Dec-15	12-Dec-15	w/end	Annual	Carols/Christmas		100%		
Mt Victoria Christmas Event	Memorial Park, Mt Victoria	December	12-Dec-15	12-Dec-15	w/end	Annual	Carols/Christmas		100%		
Christmas in the Park WWF	Wilson Park, WWFs	December	13-Dec-15	13-Dec-15	w/end	Annual	Carols/Christmas		100%		
Blackheath Community Carols	Blackheath Community Hall	December	13-Dec-15	13-Dec-15	w/end	Annual	Carols/Christmas		100%		
Christmas Carols in the Park - Glenbrook	Glenbrook Park	December	18-Dec-15	18-Dec-15	Fri	Annual	Carols/Christmas		100%		
Santa Arrives by Steam Tram	Valley Heights Locomotive Depot	December	12-Dec-15	13-Dec-15	w/end	Annual	Carols/Christmas		???		
IDAHOT Day	Carrington Pl Katoomba	May	17-May-15	17-May-15	w/end	Annual	Civic/Commemorative				
Three Sisters Walking Track Opening	Echo Point Lookout	July	20-Jul-15	20-Jul-15	MidWk	One Off	Civic/Commemorative				
Springwood Hub Opening	Springwood Hub	March	14-Mar-15	14-Mar-15	w/end	One Off	Civic/Commemorative				
Police Info Day Springwood	Springwood Town Centre	April	22-Apr-15	22-Apr-15	MidWk	One Off	Civic/Commemorative				
Handshake for Peace	Lone Pine Reserve	April	18-Apr-15	18-Apr-15	w/end	One Off	Civic/Commemorative				Yes
ANZAC DAY - Glenbrook	Glenbrook Park	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
ANZAC DAY - Springwood	Buckland Pk, Macquarie Rd, Springwood	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
ANZAC Sunset Ceremony at Woodford	Memorial Park, Woodford	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				
ANZAC DAY - Hazelbrook	Memorial at Gloria Park, Hazelbrook	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
ANZAC DAY - Lawson	War Memorial, Honour Ave, Lawson	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
ANZAC Day - Wentworth Falls	Coronation Park, Wentworth Falls	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				
ANZAC DAY - Katoomba	Katoomba RSL Club	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
ANZAC DAY - Blackheath	Blackheath War Memorial	April	25-Apr-15	25-Apr-15	w/end	Annual	Civic/Commemorative				On Road
Hazelbrook ANZAC History Talk	Memory Park, Hazelbrook	April	25-Apr-15	25-Apr-15	w/end	One Off	Civic/Commemorative				
Remembrance Day Wentworth Falls	Coronation Park, Wentworth Falls	November	11-Nov-15	11-Nov-15	MidWk	Annual	Civic/Commemorative				
Remembrance Day Springwood	Buckland Pk, Macquarie Rd, Springwood	November	11-Nov-15	11-Nov-15	MidWk	Annual	Civic/Commemorative				
Remembrance Day Blackheath	Blackheath Memorial Gardens	November	11-Nov-15	11-Nov-15	MidWk	Annual	Civic/Commemorative				
Remembrance Day Mt Victoria	Mt Victoria War Memorial	November	11-Nov-15	11-Nov-15	MidWk	Annual	Civic/Commemorative				

¹⁸⁸ Provided by BMCC



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Lady Luck	Carrington PI Katoomba	January	16-Jan-15	17-Jan-15	W/end	Annual	Community	750			YES
The Roaring 20' & All that Jazz Festival	Various venues	February	07-Feb-15	22-Feb-15	Both	Annual	Community				
Leura Village Fair	Leura Mall, Leura	October	10-Oct-15	11-Oct-15	w/end	Annual	Community	5,000	40%	60%	
Blackheath Rhodo Festival	Blackheath	November	07-Nov-15	07-Nov-15	w/end	Annual	Community	2,000	60%	40%	
Yulefest	Various locations in BM	June-August	24-Jun-16	5-Aug-16		Annual	Community				
Good Food Month		October	1-Oct-16	31-Oct-16	Both	Annual	Community				
Summer Harvest Festival	Blue Mountains Region	January	23-Jan-15	28-Feb-15	Both	Annual	Community				
Wines of the West Festival	Carrington Hotel, Katoomba	January	24-Jan-15	25-Jan-15	w/end	Annual	Community				
Glenbrook Australia Day and Annual Gnome Convention	Glenbrook Park	January	26-Jan-15	26-Jan-15	MidWk	Annual	Community	6,000			
Springwood Australia Day	Springwood	January	26-Jan-15	26-Jan-15	MidWk	Annual	Community	1,500			
Opening of the Roaring 20s...And All That Jazz Festival	Hydro Majestic	February	07-Feb-15	07-Feb-15	w/end	Annual	Community				
The Great Art Deco Ball	Carrington Hotel	February	07-Feb-15	07-Feb-15	w/end	Annual	Community				
Meet the street x 6	Various villages	March	13-Mar-15 +	13-Mar-15 +	Fri	One Off	Community				
TomahROMA	Mt Tomah Botanic Garden	May	02-May-15	02-May-15	w/end	Annual	Community				
Medlow Bath Picnic Day (CXLD)	Medlow Park, Medlow Bath	May	31-May-15	31-May-15	w/end	One Off	Community				
Police Info Day Blaxland	Blaxland Mall	June	17-Jun-15	17-Jun-15	MidWk	One Off	Community				
C3 Billy Cart Bash	Buttenshaw Park, Springwood	July	12-Jul-15	12-Jul-15	w/end	Annual	Community	250			
Daffodil Festival	Mt Tomah Botanic Garden	August	22-Aug-15	30-Aug-15	Both	Annual	Community				
Springtopia	Springwood Public School	September	05-Sep-15	05-Sep-15	w/end	Annual	Community	800			
ACRC Family Fun Day - Melrose Park	Melrose Park, Katoomba	September	25-Sep-15	25-Sep-15	Fri	One Off	Community	100			
Culturescape Illumination event	Carrington Hotel	October	03-Oct-15	03-Oct-15	w/end	One Off?	Community	1,500			
NSW Transit Police and Beyond Blue Fund Raiser	Glenbrook Park	October	10-Oct-15	10-Oct-15	w/end	One Off	Community				
Springwood United FC Presentation Day	Summerhayes Park, Hawkesbury Rd, Springwood	October	18-Oct-15	18-Oct-15	w/end	Annual	Community		100%		
Reclaim the Night	Katoomba/Leura Community Hall and Forecourt	October	23-Oct-15	23-Oct-15	Fri	Annual	Community		100%		
Oktoberfest	Carrington PI, Katoomba	October	31-Oct-15	31-Oct-15	w/end	Annual	Community	500			
Halloween Event Blackheath	Memorial Park, Blackheath	October	31-Oct-15	31-Oct-15	w/end	Annual	Community		100%		
Warrimoo Spring Fair	Warrimoo Public School	November	01-Nov-15	01-Nov-15	w/end	One Off	Community				
Glenbrook Spring Festival	Glenbrook Village/Park	November	14-Nov-15	14-Nov-15	w/end	Annual	Community	3,000	50%	50%	
Mid Mountains Festival Lawson	Lawson Town Square	November	14-Nov-15	14-Nov-15	w/end	Annual	Community	600			Yes
ACRC Family Fun Day Hazelbrook	Gloria Park Oval, Hazelbrook	November	15-Nov-15	15-Nov-15	w/end	One Off	Community				
Police Info Day Springwood	Springwood Town Centre	November	25-Nov-15	25-Nov-15	MidWk	One Off	Community				
Moon Festival	Hydro Majestic	September	25-Sep-16	25-Sep-16	w/end		Community				
Steam Train or Tram Rides at Valley Heights	Valley Heights Rail Museum	August-November	14-Aug-16	27-Nov-16	w/end		Community				
Leura Harvest	Leura Mall, Leura	May	03-May-15	03-May-15	w/end	Annual	Community	1,500			Yes
Winter Magic Festival	Katoomba Street	June	20-Jun-15	20-Jun-15	w/end	Annual	Community	40,000	50%	50%	Yes
Rotary 100 yr Celebration	Carrington PI Katoomba	February	21-Feb-15	21-Feb-15	w/end	Annual	Community	100			
NSW Reconciliation Lunch	The Gully, Katoomba	February	28-Feb-15	28-Feb-15	w/end	One Off	Community				
Springwood Foundation Day	Springwood Town Centre	March	14-Mar-15	14-Mar-15	w/end	Annual	Community	4,000	40%	60%	Yes
C3 Good Friday Breakfast	Glenbrook Park	April	03-Apr-15	03-Apr-15	Fri	Annual	Community				
Easter in the Park Wentworth Falls	Wilson Park, WWFs	April	05-Apr-15	05-Apr-15	w/end	Annual	Community				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
ACRC Family Fun Day - Katoomba	Melrose Park, Katoomba	April	17-Apr-15	17-Apr-15	Fri	Annual	Community				
Blaxland Explorers Day	Blaxland Mall	May	09-May-15	09-May-15	w/end	Annual	Community	500			
Blackheath Picnic Day	Blackheath Gardens/Memorial Park	May	16-May-15	16-May-15	w/end	Annual	Community				
Million Paws Walk	Melrose Park, Katoomba	May	17-May-15	17-May-15	w/end	Annual	Community	450	100%		
NAIDOC Week	The Gully, Katoomba and Civic Pl, Katoomba	July	06-Jul-15	06-Jul-15	MidWk	Annual	Community				
Blackheath Food and Wine Fair	Ivanho Hotel grounds in 2015					Annual	Community				
Mt Victoria Steam Event	Mt Victoria Station	September	05-Sep-15	05-Sep-15	w/end	One Off	Community				
BM Con Society Rally in Civic Place	Civic Pl, Katoomba	July	18-Jul-15	18-Jul-15	w/end	One Off	Community				
Dalai Lama visit	Fairmont	June	06-Jun-15	07-Jun-15	w/end	One Off	Community				
Women in Policing Event	BM Cultural Centre	July	07-Jul-15	07-Jul-15	MidWk	One Off	Community				
Vietnam Veterans Day	Macquarie Rd, Springwood	August	16-Aug-15	16-Aug-15	w/end	Annual	Community				On Road
Leura Singers present "Last Night at the Proms"	Leura Uniting Church	October	24-Oct-15	24-Oct-15	w/end	One off	Community				
Plants With Bite! Carnivorous Plant Fair	Mt Tomah Botanic Garden	December	05-Dec-15	13-Dec-15	Both	Annual	Community				
2015 Blue Mountains Elvis Festival	Katoomba RSL Club	August	14-Aug-15	16-Aug-15	w/end	Annual	Concert				
Jaron Freeman-Fox & The Opposite of Everything (Canada) Special Guests - concert	Hotel Gearin, Katoomba	January	31-Jan-15	31-Jan-15	w/end	One off	Concert				
Jazz in the Gardens	Norman Lindsay Gallery	February	21-Feb-15	21-Feb-15	w/end	Annual	Concert				
Garden Grooves	Mt Tomah Botanic Garden	March	01-Mar-15	01-Mar-15	w/end	Annual	Concert				
Salvation Army Concert - Carrington Pl	Carrington Pl Katoomba	March	14-Mar-15	14-Mar-15	w/end	One Off	Concert				
Gospel Blues Service	Katoomba	March	15-Mar-15	15-Mar-15	w/end	One off	Concert				
Academy Singers – Palm Sunday Choral Event	Katoomba	March	29-Mar-15	29-Mar-15	w/end	One off	concert				
Jazz & Wine Fest at Norman Lindsay Gallery	Norman Lindsay Gallery	May	16-May-15	16-May-15	w/end	Annual	Concert				
Winter Magic Ball – Woodstock	Carrington Hotel	June	20-Jun-15	20-Jun-15	w/end	Annual	Concert	200			
"Cello & Chocolate"	The Gingerbread House, Katoomba	June	27-Jun-15	27-Jun-15	w/end	Annual	Concert				
French Cabaret with Baby et Lulu	Carrington Hotel, Katoomba	July	04-Jul-15	04-Jul-15	w/end	One off	Concert				
"Cello & Chocolate"	The Gingerbread House, Katoomba	July	25-Jul-15	25-Jul-15	w/end	Annual	Concert				
The Streeton Trio – Blue Mountains Concert Society	BM Theatre & Comm. Hub	August	08-Aug-15	08-Aug-15	w/end	Annual	Concert				
Schubert Mozart Boccherini – Phoenix Choir Blackheath	Phillips Hall, Blackheath	August	21-Aug-15	22-Aug-15	w/end	One Off	Concert				
"Cello & Chocolate"	The Gingerbread House, Katoomba	August	22-Aug-15	22-Aug-15	w/end	Annual	Concert				
Simon Tedeschi and Roger Benedict – Blue Mountains Concert Society	BM Theatre & Comm. Hub	August	22-Aug-15	22-Aug-15	w/end	Annual	Concert				
Bennelong Brass (concert)	BM Theatre & Comm. Hub	September	26-Sep-15	26-Sep-15	w/end	Annual	Concert				
'Cello & Chocolate'	The Gingerbread House, Katoomba	October	03-Oct-15	03-Oct-15	w/end	Annual	Concert				
Three Piece Suite presents 'Champagne Flute'	Blackheath Presbyterian Church	October	25-Oct-15	25-Oct-15	w/end	Annual	Concert				
'Cello & Chocolate'	The Gingerbread House, Katoomba	October	31-Oct-15	31-Oct-15	w/end	Annual	Concert				
Ian Cooper and Grigoryan Brothers	BM Theatre & Comm. Hub	November	21-Nov-15	21-Nov-15	w/end	Annual	Concert				
'Cello & Chocolate'	The Gingerbread House, Katoomba	November	28-Nov-15	28-Nov-15	w/end	Annual	Concert				
Phoenix Choir – Christmas Concert	St Alban's Anglican Church, Leura	December	05-Dec-15	05-Dec-15	w/end	One Off	Concert				
The Rumjacks – 'Home Rule' East Coast Tour	Hotel Gearin, Katoomba	December	19-Dec-15	19-Dec-15	w/end	One Off	Concert				
New Year's Eve with Claude Hay and More	Hotel Gearin, Katoomba	December	31-Dec-15	31-Dec-15	MidWk	Annual	Concert				
Blackheath Choir Festival	Blackheath	August	26-Aug-16	28-Aug-16	Both	Annual	Concert				
'Allo 'Allo – Dinner Theatre	Leura Waldorf Resort	January	03-Jan-15	31-Jan-15	Both	One Off	Dinner Show				
PURE BOHEMIA Life Drawing and Dinner	Paragon Café	January	09-Jan-15	09-Jan-15	Fri	Annual	Dinner Show				
RAPT in Concert + Dinner at Paragon Café	Paragon Café	June	12-Jun-15	12-Jun-15	Fri	One off	Dinner Show				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
The Goon Show LIVE! @ Yulefest	Hotel Blue, Katoomba	June-Aug	27-Jun-15	01-Aug-15	Both	Annual	Dinner Show				
Afternoon With Spirit	Carrington Hotel	August	23-Aug-15	23-Aug-15	w/end	One off	Dinner Show				
String Theories in Concert at Paragon Café	Paragon Café	September	12-Sep-15	12-Sep-15	w/end	One Off	Dinner Show				
Pure Bohemia at the Iconic Paragon Café	Paragon Café	September	25-Sep-15	25-Sep-15	Fri	Annual	Dinner Show				
Duo Caliente in Concert at Paragon Café	Paragon Café	October	17-Oct-15	17-Oct-15	w/end	One off	Dinner Show				
Chris Henry and The Hardcore Grass	Hotel Gearin, Katoomba	October	31-Oct-15	31-Oct-15	w/end	One Off	Dinner Show				
Alturas in Concert and Dinner at Paragon Café	Paragon Café	November	13-Nov-15	13-Nov-15	Fri	One Off	Dinner Show				
Frank Yamma in Concert and Dinner at Paragon Café	Paragon Café	November	20-Nov-15	20-Nov-15	Fri	One Off	Dinner Show				
Pure Bohemia at the Iconic Paragon Café	Paragon Café	November	27-Nov-15	27-Nov-15	Fri	Annual	Dinner Show				
The Morrisons Single Launch with Special Guests Lime and Steel	Hotel Gearin, Katoomba	December	05-Dec-15	05-Dec-15	w/end	One Off	Dinner Show				
Six Foot Track Marathon	Start Explorers Tree to J Caves	March	14-Mar-15	14-Mar-15	w/end	Annual	Endurance	1,150			Yes
Wild Endurance	Dunphy's Camp, Megalong Valley	May	02-May-15	03-May-15	w/end	Annual	Endurance				On Road
North Face 100 (Now Ultra Trail Australia)	starts at Scenic World	May	16-May-15	17-May-15	w/end	Annual	Endurance	6,000	40%	60%	Yes
Running Wild - Knapsack Park	Knapsack Park, Glenbrook	January	26-Jan-15	26-Jan-15	MidWk	Annual	Endurance	400			
Running Wild - Wilson Park, Wentworth Falls	Wilson Park - Nat Par & return	February	15-Feb-15	15-Feb-15	w/end	Annual	Endurance	250			
Running Wild - Lawson	North Lawson Park	March	22-Mar-15	22-Mar-15	w/end	Annual	Endurance				
CareFlight Woodford to Glenbrook Classic	Woodford to Euroka Clearing, Glenbrook	June	28-Jun-15	28-Jun-15	w/end	Annual	Endurance	850			Yes
Houndslow Classic	Blackheath	October	10-Oct-15	11-Oct-15	w/end	Annual	Endurance	600	40%	60%	Yes
Lawson Parkrun	North Lawson Park	Weekly	03-Jan-15	Weekly	w/end	Weekly	Endurance	70-120			
Sculpture at Scenic World	Scenic World	April	15-Apr-15	10-May-15	Both	Annual	Exhibition				
We Don't Need a Map: A Martu Experience of the Western Desert - Exhibition	BM Cultural Centre	Dec-Feb	05-Dec-14	15-Feb-15	Both	One Off	Exhibition	5440	40%	60%	
Jason Benjamin: Everyone is Here - Exhibition	BM Cultural Centre	Dec-Jan	12-Dec-14	25-Jan-15	Both	One Off	Exhibition	2485			
Biophilia – an exhibition by James Blackwell - exhibition	Mt Tomah Botanic Garden	Dec-Feb	20-Dec-14	01-Feb-15	Both	One Off	Exhibition				
The Native Grid II: James Blackwell - exhibition	BM Cultural Centre	Jan-Mar	30-Jan-15	22-Mar-15	Both	One off	Exhibition	2002			
The Green Desert - exhibition	BM Cultural Centre	Feb-Mar	21-Feb-15	29-Mar-15	Both	One Off	Exhibition	2399			
Reiki Wellness Retreat	Brahma Kumaris, Leura	February	27-Feb-15	01-May-15	w/end	One Off	Exhibition				
The Blue Mountains: Grandeur & Intimacy – an exhibition by Ian Brown	Mt Tomah Botanic Garden	Mar-April	07-Mar-15	27-Apr-15	Both	One off	Exhibition				
Blackheath Art Society – Easter Weekend Exhibition	Blackheath Studio, Blackheath	April	03-Apr-15	06-Apr-15	w/end	Annual	Exhibition				
Blue Mountains Storytelling Art Project	Carrington Pl, Katoomba	2 days.	07-Apr-15	30-May-15	Both	One Off	Exhibition				
The International Back To Back Wool Challenge	Mt Tomah Botanic Garden	May	02-May-15	02-May-15	w/end	Annual	Exhibition				
Waste to Art (exhibition)	BM Cultural Centre	May	02-May-15	16-May-15	Both	Annual	Exhibition				
Head in the Clouds (banner exhibition)	Katoomba St, BM Cultural Centre	May	12-May-15	03-Jun-15	Both	One Off	Exhibition				
White Out: Tamara Mendels (exhibition)	BM Cultural Centre	May-June	16-May-15	28-Jun-15	Both	One Off	Exhibition				
Whispering Trees installation/exhibition	Carrington Pl Katoomba	May	21-May-15	07-Jun-15	Both	One Off	Exhibition				
Strange Embrace (exhibition)	BM Cultural Centre	May-July	30-May-15	19-Jul-15	Both	One Off	Exhibition				
Blackheath Art Society – Winter Open Exhibition	Blackheath Studio, Blackheath	June	05-Jun-15	08-Jun-15	w/end	Annual	Exhibition				
BentART	Wentworth Falls School of Arts	June	05-Jun-15	08-Jun-15	w/end	Annual	Exhibition				
This is Darug Art – an exhibition by Shane Smithers	BM Cultural Centre	June-July	06-Jun-15	31-Jul-15	Both	One off	Exhibition				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
The Annual Blue Mountains Antiques and Collectables	Blackheath Community Hall	July	04-Jul-15	05-Jul-15	w/end	Annual	Exhibition				
A Week in the Life of the World - exhibition	BM Cultural Centre	July-Sep	25-Jul-15	06-Sep-15	Both	One off	Exhibition				
Rocky Ground - exhibition	BM Cultural Centre	Aug-Sep	01-Aug-15	13-Sep-15	Both	One off	Exhibition				
Sea Treasures Exhibition	Norman Lindsay Gallery	Aug-Jan	12-Aug-15	30-Jan-16	Both	One Off	Exhibition				
Springwood Annual Artshow	Springwood High School	August	28-Aug-15	30-Aug-15	w/end	Annual	Exhibition				
Greater West Brickfest (Lego Exhibition)	Springwood Baptist Church	September	05-Sep-15	05-Sep-15	w/end	One Off	Exhibition				
Waratahs, Wildflowers & Wildlife	Mt Tomah Botanic Garden	Sept-Oct	05-Sep-15	18-Oct-15	Both	One off	Exhibition				
Three Spring Art Exhibitions	Everglades Gallery	Sep- Nov	05-Sep-15	29-Nov-15	Both	One off	Exhibition				
Varuna Open House	Varuna	September	12-Sep-15	12-Sep-15	w/end	Annual	Exhibition				
Floor Talk - Flora & Fauna: The Nature of Fashion	BM Cultural Centre	September	12-Sep-15	12-Sep-15	w/end	One off	Exhibition				
Flora and Fauna: The Nature of Fashion	BM Cultural Centre	Sep- Nov	12-Sep-15	01-Nov-15	Both	One Off	Exhibition				
Wild about Waratahs Festival	Mt Tomah Botanic Garden	September	19-Sep-15	27-Sep-15	Both	Annual	Exhibition				
Play for Time: Damian Castaldi & Solange Kershaw (exhibition)	BM Cultural Centre	Sep-Nov	19-Sep-15	01-Nov-15	Both	One Off	Exhibition				
Blackheath Art Society – Blackheath Art Prize	Studio, Blackheath	October	02-Oct-15	05-Oct-15	w/end	Annual	Exhibition				
Mt Wilson and Mt Irvine Photography & Art Exhibition	Village Hall, Mt Wilson	October	10-Oct-15	11-Oct-15	w/end	Annual	Exhibition				On Road
Arthur Boyd: An Active Witness - exhibition	BM Cultural Centre	Nov-Jan	07-Nov-15	03-Jan-16	Both	One off	Exhibition				
Joan Ross - exhibition	BM Cultural Centre	Nov-Jan	07-Nov-15	03-Jan-16	Both	One Off	Exhibition				
Magic Moments – Birds and Blooms – a photographic exhibition by Wendy Smith	Mt Tomah Botanic Garden	Dec-Jan	19-Dec-15	31-Jan-16	Both	One off	Exhibition				
Blue Mountains ArtFest	Wentworth Falls Public School	November	11-Nov-16	13-Nov-16	Both	Annual	Exhibition				
Varuna Open House	Varuna, Katoomba	September	26-Sep-15	26-Sep-15	w/end	Annual	Exhibition				
Wedding Open Day at Fairmont Resort	Fairmont Resort	September	27-Sep-15	27-Sep-15	w/end	One off	Exhibition				
Billjims and Brothers (exhibition)	Norman Lindsay Gallery	April	15-Apr-15	30-Jul-15	Both	One Off	Exhibition				
Springwood Community Quilt Show -	Springwood High School	April	24-Apr-15	26-Apr-15	w/end	Annual	Exhibition				
Winmalee Autumn Artfest	Winmalee High School	May	01-May-15	03-May-15	w/end	Annual	Exhibition				
Antique Vintage and Collectables Fair	Winmalee High School	June	06-Jun-15	07-Jun-15	w/end	Annual	Exhibition				
In Living Colour - art exhibition	Norman Lindsay Gallery	June-Aug	24-Jun-15	24-Aug-15	Both	One Off	Exhibition				
Varuna-Sydney Writers Festival (Blue Mountains Program)	Varuna/Carrington Hotel	May	18-May-15	19-May-15	MidWk	Annual	Exhibition				
The Cavalcade of History & Fashion – The Edwardian House Party: c1910	Everglades House	November	14-Nov-15	14-Nov-15	w/end	Annual?	Exhibition				
Peter Elfes: Documentary Film Screening and Artist Talks	BM Cultural Centre	March	07-Mar-15	07-Mar-15	w/end	One off	Film Screening				
Artist Talk & Documentary Film Screening	BM Cultural Centre	March	21-Mar-15	21-Mar-15	w/end	One off	Film Screening				
FernGully: The Last Rainforest Screening at Scenic World	Scenic World	2 days.	01-Jul-15	08-Jul-15	Both	One off	Film Screening				
Fashion Film Screening – Film Screening of <i>The Women</i> (1939) and introduction by film critic David Stratton	BM Cultural Centre	September	19-Sep-15	19-Sep-15	w/end	One Off	Film Screening				
Fashion Film Screening - Film screening of <i>The Rear Window</i> (1954) and introduction by Charlotte Smith	BM Cultural Centre	October	10-Oct-15	10-Oct-15	w/end	One Off	Film Screening				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Fashion Film Screening - Director's Talk by Gillian Armstrong and screening of excerpts from <i>Women He's Undressed</i> (2015)	BM Cultural Centre	October	17-Oct-15	17-Oct-15	w/end	One Off	Film Screening				
World War I Film Fest	Mt Vic Flicks	November	20-Nov-15	22-Nov-15	w/end	One Off?	Film Screening				
Little Shop of Horrors – 1986 Film Screening (Rated M)	Mt Tomah Botanic Garden	December	12-Dec-15	12-Dec-15	w/end	One off	Film Screening				
Leura Gardens Festival	Leura	October	03-Oct-15	11-Oct-15	Both	Annual	Gardens				
Birds, Bees and Backyards – Gardening in the 1920s	Mt Tomah Botanic Garden	February	07-Feb-15	22-Feb-15	Both	One off	Gardens				
Annual Hazelbrook Woodford Garden Festival	Hazelbrook/Woodford	September	12-Sep-15	13-Sep-15	w/end	Annual	Gardens				
Cool Climate Garden Tours	Everglades Gardens	September	19-Sep-15	19-Sep-15	w/end	One Off	Gardens				
Gadara Wildflowers Farm Open Day	Mt Tomah	September	27-Sep-15	27-Sep-15	w/end	Annual	Gardens				
A Day with the Master Gardeners - Blue Mountains Garden Design and Horticulture School - Mount Wilson	Dennarque, Mt Wilson	October	10-Oct-15	10-Oct-15	w/end	One off	Gardens				
Plant Propagation and Production - Blue Mountains Garden Design and Horticulture School - Mount Wilson	Dennarque, Mt Wilson	October	24-Oct-15	24-Oct-15	w/end	One off	Gardens				
Trees and Shrubs for your Garden - Blue Mountains Garden Design and Horticulture School - Mount Wilson	Dennarque, Mt Wilson	November	07-Nov-15	07-Nov-15	w/end	One off	Gardens				Yes
Mount Wilson Autumn Festival	Mount Wilson	April	15-Apr-17	15-Apr-17	w/end		Gardens				
Crackin Cancer	Megalong Valley - showground	September	26-Sep-15	03-Oct-15	6 DAYS	Annual	Horse riding	60	10%	90%	
Kid's Story Time	Mt Tomah Botanic Garden	April	10-Apr-15	10-Apr-15	Fri	One off	Kids				
Mountain Explorers - children's Self Guided Trail	Blue Mountains Botanic Garden	September-November	1-Sep-16	30-Nov-16	Both		Kids				
Teddy Bears Day Out	Valley Heights Rail Museum	May	28-May-17	28-May-17	w/end		Kids				
Lah-Lah in Concert	BM Theatre & Comm. Hub	July	07-Jul-15	07-Jul-15	MidWk	One off	Kids				
Mystery of the Munchers - kids walk	Mt Tomah Botanic Garden	Sept-Jan	01-Sep-14	28-Feb-15	Both	One Off	Kids				
Disney Fairies Trail - kids walk	Mt Tomah Botanic Garden	Dec-Feb	01-Dec-14	28-Feb-15	Both	One Off	Kids				
Living Worlds (exhibition)	Mt Tomah Botanic Garden	Winter	01-Jun-15	30-Nov-15	Both	One Off	Kids				
Bastille Day Luncheon	Everglades Gardens	July	11-Jul-15	11-Jul-15	w/end	Annual	Lunch				
Twilight Market at Contextart 2015	Korowal School, Hazelbrook	April	13-Apr-15	13-Apr-15	MidWk	Annual	Market				
Mountain Care Car Boot Sale Mt Riverview	Mt Riverview shops	August	22-Aug-15	22-Aug-15	w/end	One Off	Market				Carpark
Back to Hartley – Annual Produce Market	Hartley Historic Site	October	25-Oct-15	25-Oct-15	w/end	Annual	Market				
Wollemi Artisan Markets	BM Cultural Centre	December	04-Dec-15	04-Dec-15	Fri	Annual	Market				
St Columbas Christmas Market	Springwood Town Centre	December	10-Dec-15	10-Dec-15	MidWk	Annual	Market		100%		
Springwood Chamber Christmas Shopping	Springwood Shops	December	10-Dec-15	10-Dec-15	MidWk	Annual	Market		100%		
Blackheath Growers Market	Memory Park Blackheath	Monthly	08-Feb-15	Monthly	w/end	Monthly	Market	750/MKT			
Blaxland Monthly Markets	Blaxland Mall	Monthly	14-Feb-15	Monthly	w/end	Monthly	Market	500/MKT	100%		
Springwood Monthly Growers Markets	Springwood Hub	Monthly	23-Aug-15	Monthly	W/end	Monthly	Market	600/MKT	100%		
Blackheath Flower and Craft Show	Blackheath Community Centre	September	26-Sep-15	27-Sep-15	w/end	Annual	Market				
Celebrating Design Artisan Markets	Springwood High School	November	14-Nov-15	14-Nov-15	w/end	Annual	Market				
Live at the Village presents AMBON	BM Theatre & Comm. Hub	June	06-Jun-15	06-Jun-15	w/end	One off	Music				
Blue Mountains Ukulele Festival	Katoomba Civic Centre Carrington Pl & Hotel	February	14-Feb-15	15-Feb-15	w/end	Annual	Music	4,000			



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Blue Mountains Music Festival	Katoomba RSL, Pub School, Clarendon	March	14-Mar-15	16-Mar-15	w/end	Annual	Music	4,000			
Glee Books - Dog Book Launch	Blackheath Memorial Park	July	12-Jul-15	12-Jul-15	w/end	One Off	Other				
Beltane Radiothon KSP	Kingsford Smith Park, Katoomba	Oct-Nov	31-Oct-15	01-Nov-15	w/end	One Off	Other		100%		
November Crown Tournament	Kingsford Smith Park, Katoomba	November	07-Nov-15	08-Nov-15	w/end	One Off	Other	150	20%	80%	
World Heritage 15th Anniversary event	Govetts Leap Lookout, Blackheath	November	28-Nov-15	28-Nov-15	w/end	One Off	Other				
Leura Shakespeare Festival	Everglades Gardens	January	10-Jan-15	25-Jan-15	W/end	Annual	Play/Theatre				
The Truth by Sir Terry Pratchett	Glenbrook Community Theatre	May	01-May-15	09-May-15	Both	Annual	Play/Theatre				
Phantom of the Opera – Blue Mountains Musical Society	BM Theatre & Comm. Hub	October	10-Oct-15	25-Oct-15	Both	Annual	Play/Theatre				
Taskforce 72 Model Ship Association Annual Regatta	Wentworth Falls Lake	November	28-Nov-15	29-Nov-15	w/end	Bi-Annual	Regatta	100	10%	90%	
Annual NSW Iris Show	Blackheath Community Hall	October	24-Oct-15	25-Oct-15	w/end	Annual	Show				
Greystanes Golf Day 2015	Leura Golf Club	April	10-Apr-15	10-Apr-15	Fri	Annual	Sports				
Contingency And History – Blackheath Philosophy Forum	Blackheath Community Centre	June	13-Jun-15	13-Jun-15	w/end	Annual	Talk				
The Sceptical Depths Of Film – Blackheath Philosophy Forum	Blackheath Community Centre	June	20-Jun-15	20-Jun-15	w/end	Annual	Talk				
What Literature Can Do That Philosophy Cannot – Blackheath Philosophy Forum	Blackheath Community Centre	July	11-Jul-15	11-Jul-15	w/end	Annual	Talk				
Winter Bird Walk with Carol Proberts	Mt Tomah Botanic Garden	July	25-Jul-15	25-Jul-15	w/end	One Off	Talk				
Music As Philosophy – Blackheath Philosophy Forum	Blackheath Community Centre	July	25-Jul-15	25-Jul-15	w/end	Annual	Talk				
Blackheath History Forum – Wrestling with the Leviathan: biography, history, Australia and C.M.H Clark	Blackheath Public School Hall	September	12-Sep-15	12-Sep-15	w/end	Annual	Talk				
Inaugural Mick Dark Talk for the Future: Time Flannery	Wentworth Falls School of Arts	September	19-Sep-15	19-Sep-15	w/end	One Off	Talk				
Panel Discussion - From Museum to Media to Muse: Australia's Fashion Story	BM Cultural Centre	September	26-Sep-15	26-Sep-15	w/end	One Off	Talk				
Blackheath History Forum – Telling the Secrets: writing the official history of ASIO	Blackheath Public School Hall	September	26-Sep-15	26-Sep-15	w/end	Annual	Talk				
Q&A - Play for Time: Damian Castaldi & Solange Kershaw	BM Cultural Centre	October	03-Oct-15	03-Oct-15	w/end	One Off	Talk				
Lunchtime Talk – Dior's Muse - Flora & Fauna: The Nature of Fashion	BM Cultural Centre	October	10-Oct-15	10-Oct-15	w/end	One Off	Talk				
Blackheath History Forum – 'Behind Every Great Man...'	Blackheath Community Centre	October	10-Oct-15	10-Oct-15	w/end	Annual	Talk				
Panel Discussion - Fashion's Sway on the Arts	BM Cultural Centre	October	17-Oct-15	17-Oct-15	w/end	One Off	Talk				
Blackheath History Forum – The Fraser Government's Asylum Seeker Policy	Blackheath Public School Hall	October	24-Oct-15	24-Oct-15	w/end	Annual	Talk				
Talk & Discussion – Arthur Boyd: An Active Witness	BM Cultural Centre	December	05-Dec-15	05-Dec-15	w/end	One Off	Talk				
Curator & Artist Talk – Joan Ross	BM Cultural Centre	December	12-Dec-15	12-Dec-15	w/end	One off	Talk				
Dead Men Talking (Concert/Show)	BM Theatre & Comm. Hub	August	09-Aug-15	09-Aug-15	w/end	One off	Talk				
Australian Poetry Slam	Katoomba library	June	18-Jun-15	18-Jun-15	MidWk	One Off	Talk				
Greater Blue Mountains Heritage Trail Open Days	Various locations in BM	October	03-Oct-15	03-Oct-15	w/end	Annual	Trail				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Bookworm Trivia: A family event for Reading Hour	Springwood Library	August	15-Aug-15	15-Aug-15	w/end	One off	Trivia Night				
Daffodil Discovery Walk	Mt Tomah Botanic Garden	August	25-Aug-15	25-Aug-15	MidWk	Annual	Walk				
Waratah Wander	Mt Tomah Botanic Garden	September	22-Sep-15	22-Sep-15	MidWk	Annual	Walk				
National Parks Discovery Wild Waratah Walk	Bells Line of Road, Mt Tomah	September	26-Sep-15	26-Sep-15	w/end	Annual	Walk				
Cooee March	travelled through the Mtns	November	04-Nov-15	07-Nov-15	Both	One Off	Walk				
Walk 4 William	Faulconbridge	September	12-Sep-15	12-Sep-15	w/end	One Off	Walk				
Bird Talk	Mt Tomah Botanic Garden	January	31-Jan-15	31-Jan-15	w/end	Annual	Walk				
History Tour of the Carrington Hotel	Carrington Hotel	February	07-Feb-15	07-Feb-15	w/end	Annual	Walk				
Spring Bird Walk and Talk	Mt Tomah Botanic Garden	October	17-Oct-15	17-Oct-15	w/end	One Off	Walk				
Colleena Shakti – From Folk to Fusion (workshops/dance event)	Katoomba Halls/Springwood Hub	June	06-Jun-15	07-Jun-15	w/end	One Off	Workshop				
Life Drawing Summer Schools - Norman Lindsay	Norman Lindsay Gallery	2 weeks	05-Jan-15	15-Jan-15	MidWk	Annual	Workshop				
'Drawing and Pastels' at Norman Lindsay Gallery - workshop	Norman Lindsay Gallery	January	09-Jan-15	09-Jan-15	Fri	One Off	Workshop				
Cartoon Dave workshops	Norman Lindsay Gallery	January	10-Jan-15	09-Jan-15	W/end	One Off	Workshop				
Introduction to Caricature and Manga Drawing	Norman Lindsay Gallery	January	10-Jan-15	10-Jan-15	w/end	One Off	Workshop				
Abstract Colour Painting Workshop - Liz Perfect	Norman Lindsay Gallery	January	16-Jan-15	16-Jan-15	Fri	One Off	Workshop				
Animated Animals in Clay - workshop	Norman Lindsay Gallery	January	17-Jan-15	17-Jan-15	W/end	One off	Workshop				
Carnivorous Plants & Other Curiosities – a drawing workshop with Fiona Lumsden	Mt Tomah Botanic Garden	February	01-Feb-15	01-Feb-15	w/end	One off	Workshop				
Weaving Workshop – Learn To Weave with Lanny Mackenzie	Mt Tomah Botanic Garden	February	07-Feb-15	07-Feb-15	w/end	Annual	Workshop				
Art & Tea Workshop	BM Cultural Centre	March	14-Mar-15	14-Mar-15	w/end	One off	Workshop				
Free Gospel Choir Workshop	Katoomba	March	14-Mar-15	14-Mar-15	w/end	One off	Workshop				
March to May – 6 Week Drawing Course with Artist David Middlebrook	BM Cultural Centre	6 weeks	28-Mar-15	09-May-15	Both	One off	Workshop	4507			
Contextart Forum	Korowal School, Hazelbrook	April	11-Apr-15	16-Apr-15	Both	Annual	Workshop				
Landscape Art Day - drawing class and artist talks	BM Cultural Centre	April	18-Apr-15	18-Apr-15	w/end	One Off	Workshop				
2 Day Painting Workshop Artist John Caldwell	BM Cultural Centre	2 days.	16-May-15	23-May-15	w/end	One Off	Workshop				
Blue Mountains Beginner to Advanced Photographic Workshops	Leura Cascades, various	June-Nov	13-Jun-15	08-Nov-15	Both	One Off	Workshop				
Mountains of Stories: Creative Writing Workshops at Blue Mountains Libraries	BM Libraries	August	01-Aug-15	01-Aug-15	w/end		Workshop				
A Taste of Family History	Springwood Library	August	17-Aug-15	22-Aug-15	Both	One Off	Workshop				
4 Day Painting Workshop with Rowen Matthews	BM Cultural Centre	4 days.	22-Aug-15	12-Sep-15	Both	One off	Workshop				
Growing bulbs successfully	Mt Tomah Botanic Garden	August	27-Aug-15	27-Aug-15	MidWk	Annual	Workshop				
Discovering WWI Service Records: A Family History 'How To' Talk	Springwood Library	August	28-Aug-15	28-Aug-15	Fri	One Off	Workshop				
Mountains of Stories: Creative Writing Workshops at Blue Mountains Libraries	Blue Mountains Libraries	August	29-Aug-15	29-Aug-15	w/end		Workshop				
Weaving Workshop – Learn to Weave with Lanny Mackenzie	Mt Tomah Botanic Garden	September	05-Sep-15	19-Sep-15	Both	Annual	Workshop				
Beginners Calligraphy Workshop	BM Cultural Centre	September	11-Sep-15	11-Sep-15	Fri	One Off	Workshop				
Intermediate Calligraphy Workshop	BM Cultural Centre	September	11-Sep-15	11-Sep-15	Fri	One Off	Workshop				



Event	Venue	Month	Start Date	End Date	W/end or MidWk	Freq.	Type	Est Visitor #	Est % Local	Est % Out of area	Road Closure
Blue Mountains: Warwick Fuller artists retreat on the edge	Parklands Country Gardens & Lodges, Blackheath	Sep-May	15-Sep-15	17-May-15	Both	One off	Workshop				
7 Week Painting Fundamentals Course with Kristel Smits	BM Cultural Centre	Sep-Oct	18-Sep-15	30-Oct-15	Both	One Off	Workshop				
Mountains of Stories: Creative Writing Workshops at Blue Mountains Libraries	Springwood Library	September	19-Sep-15	19-Sep-15	w/end		Workshop				
Weaving Workshop - Stage 2	Mt Tomah Botanic Garden	September	19-Sep-15	19-Sep-15	w/end	Annual	Workshop				
Waratahs, Wildflowers & Wildlife - nature drawing workshop	Mt Tomah Botanic Garden	October	04-Oct-15	04-Oct-15	W/end	Annual	Workshop				
Mountains of Stories: Creative Writing Workshops at Blue Mountains Libraries	Springwood Library	October	17-Oct-15	17-Oct-15	w/end		Workshop				
Bees In Your Garden	Mt Tomah Botanic Garden	November	01-Nov-15	01-Nov-15	w/end	One Off	Workshop				
6 Week Drawing Basics Course – with Kristel Smits	BM Cultural Centre	Fridays	06-Nov-15	11-Dec-15	Both	One Off	Workshop				On Road
Blue Mountains Pro Wrestling: Katoomba Slam	Katoomba Sports & Aquatic Centre	November	01-Nov-15	01-Nov-15	w/end	One Off	Wrestling				
Leura Shakespeare Festival	Everglades Historic House and Gardens	January				Annual	Community/Arts				
Opera Festival	Hydro Majestic	-					Concert				

11.5. Supporting Documentation 5 – Natural World Heritage Sites Comparative Analysis

Table 36: Natural World Heritage Sites Comparative Analysis

Site	Visitation ¹⁸⁹	Visitor Markets ¹⁹⁰	Size	Distance to closest main city ¹⁹¹	Entry Fees	Issues and Challenges ¹⁹²	Signature/Overnight Trails	Accommodation	Unique Experiences
Wet Tropics of Queensland	5,000,000	-	893,453 ha	125km km Cairns to Daintree	Free entry. \$28 for Daintree Discovery Centre; \$20 entry fee for Mamu Rainforest Canopy Walkway	Ageing infrastructure causing safety issues, land tenure issues	Wet Tropics Great Walk (2 sections: Wallaman Falls Section; Juwun and Jambal walks). Juwan and Jambal Walks 43.5km one way, taking approximately 4-6 days. Camping is permitted with permits and one bush campsite. Hotel and motel accommodation is available in Ravenshoe and Mount Garnet. Only for experienced hikers with no designated track between Blanket Creek and Orange Tree.	Heritage Lodge and Spa in the Daintree with a restaurant and spa and Daintree Eco Lodge and Spa (has Nature Package including accommodation, breakfast, Daintree River Cruise, nature walk; Nurture Package including spa treatments), located just outside the WHS. Also branded hotels located short distance from the WHS, campsites.	Whitewater rafting on the Tully River, Daintree Discovery Centre (entry fee) has elevated boardwalks, Aerial Walkway and a 23m high Canopy Tower. Mamu Canopy Walkway in Wooroonoora National Park.
Gondwana Rainforests of Australia	2,500,000	-	370,000 ha	-	Free entry	-	-	Glamping at Nightfall Wilderness Camp, O'Reillys Rainforest Retreat, Cottage at New England National Park; Plateau Beach Campground, Brushy Mountain campground, Thungutti campground.	-
Uluru-Kata Tjuta National Park	269,000	52% domestic, 48% international	132,566 ha	465km from Alice Springs	Adult: \$25 Children: \$12.50	Tourists wanting to climb Uluru (however this is at odds with the cultural values of Indigenous Australians), Ageing infrastructure, Costly and poor standard of visitor accommodation	No camping/overnight trails within WHS. Popular walks include Uluru base walk (10.6km loop - 3.5 hrs), Liru walk (4km return, 1.5hrs), Valley of the Winds Walk (7.4km circuit, 4 hrs) and Free ranger-guided mala walk (2km return, 1.5 hrs - park rangers guide a daily tour. Ranger guides along the base of the rock, telling the mala story (rufous hare-wallaby), rock art, and park management. Wheelchair accessible.	There is no accommodation/camping allowed within national park. Ayers Rock Resort is a 10-minute drive.	Field of Light dinner (light artwork after sunset - until March 2017) (outside the park), camel tours
Kakadu National Park	179,000	83% domestic, 17% international	1,980,994 ha	152km from Katherine	Adult: \$40 Children: \$20 (Dry Season) Adult: \$25	Limited walk-based experiences; undersupply of mid-to-high-end accommodation with cultural experiences, overuse of free	Koolpin Gorge to Twin Falls is a 5-day hike (50km) and is offered as a guided tour by NT Immersions and Gecko	There are 5 park-managed campgrounds, 10 unmanaged campsites, and 6 free campsites. There are hotels and cottages	River cruise, fishing tour

¹⁸⁹ Australian Visitation Source: Special data request from Tourism NT; Tourism Region Profiles, 2015, Wilderness West Tasmania, Tourism Research Australia; Economic Activity of Australia's World Heritage Areas, 2008, Department of the Environment, Water, Heritage and the Arts; National Park Service Visitor Use Statistics: Grand Canyon NP, 2016, National Park Service; National Park Service Visitor Use Statistics: Great Smoky Mountains NP, 2016, National Park Service; Domestic Visitation to NSW National Parks, 2015, Office of Environment and Heritage; Tourism in Canadian Rockies Tourism Region: A Summary of 2012 Visitor Numbers and Characteristics, 2014, Alberta Government; Visitantes nacionales Y Extranjeros Al Parque Arqueologico de Machu Picchu, 1998-2014, Ministerio de Cultura

¹⁹⁰ Tourism Regional Profile: Lasseter, YE Dec 2015, Tourism NT; Tourism Regional Profile: Kakadu Arnhem, YE Dec 2015, Tourism NT; Australia's North West: Overnight Visitor Fact Sheet 2014/2015, Tourism Western Australia; Grand Canyon National Park Northern Arizona Tourism Study, 2005, Northern Arizona University

¹⁹¹ Distance calculated using Google Directions. Note for Machu Picchu, there was no data available in Google Directions, so the Google Measure Distance tool was used.

¹⁹² Paradise lost: Australia's heritage jewels under threat, 2013, Background Briefing; Wet Tropics Nature Based Tourism Strategy, 2000, Wet Tropics Management Authority; Uluru-Kata Tjuta National Park Management Plan 2010-2020, 2010, Director of National Parks; Visitor Numbers and Satisfaction: Uluru-Kata Tjuta National Park, Director of National Parks; Smokies' aging infrastructure needs \$240 million to upgrade, 2015, The Washington Times; Avoiding the Crowds, National Park Service; Tourism in Canadian Rockies Tourism Region: A Summary of 2012 Visitor Numbers and Characteristics, 2014, Alberta Government; Tourism to the rescue, 2016, Richard Blackwell & David Parkinson; Banff National Park of Canada Management Plan, 2010, Parks Canada; Historic Sanctuary of Machu Picchu, 2016, UNESCO, Security cameras, 10-minute visiting slots and two million tourists a year: Machu Picchu's plans £28.5million makeover to cope with overcrowding, 2015, Daily Mail; Camper waste a problem on the South Island's Great Walks, 2016, Stuff, Joanne Carroll



Site	Visitation ¹⁸⁹	Visitor Markets ¹⁹⁰	Size	Distance to closest main city ¹⁹¹	Entry Fees	Issues and Challenges ¹⁹²	Signature/Overnight Trails	Accommodation	Unique Experiences
					Children: \$12.50 (Tropical Summer season)	camping sites, current bushwalking booking system difficult for visitors, quality of tour guide knowledge, variable quality and inconsistent design of infrastructure, road corridor infrastructure not planned in an integrated way, Seasonality issues with the wet season	Canoeing. Permits are needed and the walk is untracked.	available within the park and on the border. Aurora Kakadu is located within the park.	
Tasmanian Wilderness	175,000	90% domestic, 10% international	1,584,233 ha	320km from Hobart to Cradle Mountain	\$12 per person/ \$24 per car (Cradle Mountain - Adult: \$16.50 Child: \$8.25)	Visitors view the site as "better suited to 'intrepid travellers' who didn't mind 'roughing it'"; visitors generally unaware of attractions offered throughout the site.	Walls of Jerusalem (30-40km, 4 days). Only accessible by foot. Good for introductory-grade walks as there is a short walk to campsite, meaning the majority of the walk only needs a day pack as you can return to camp each day. Tasmanian Expeditions offers tours starting from \$1295 per person.	There are lodges located within and on the outskirts of the WHS such as Pumphouse Point and Pedder Wilderness Lodge (inside) and Cradle Mountain Wilderness Village (on the edge). Campsites in around the WHS.	Overland Track Photo Tours offer hiking tour and learn landscape photography along the way from award winning photographers.
Australian Fossil Mammal Sites	29,322	-	10,300 ha	277km from Mt Isa; 334km from Adelaide	Free entry	Fossils being stolen/damaged	-	Naracoorte WHA has the Wirreanda Bunkhouse (ideal for groups up to 50 people) and Wirreanda Campground. Riversleigh has camping and caravan facilities.	-
Purnululu National Park	23,687	96% domestic, 4% international	79,602 ha	805km from Katherine	Free entry if enter on foot/bicycle, \$12 per car	Difficult to maintain staff due to the remoteness of the area, land tenure issues	Piccaninny Gorge Walk, (30km, 2-7 day walk). Walk is difficult in the gorge.	Bungle Bungle Caravan Park located just outside national park (commercial), glamping in APT Bungle Wilderness Lodge (3-course dinner and breakfast included, open-air dining, liquor license, private cabin with ensuite), 2 campgrounds within park	Helicopter flights
Greater Blue Mountains Area	4,498,000	76% domestic, 24% international	1,032,649 ha	104km from Echo Point to Sydney	Free entry	Need for new accommodation, lack of evening activities, parking issues, illegal camping, dumping of waste	-	Campsites within the WHA	Scenic World, canyoning and abseiling tours.
Great Smoky Mountains National Park	10,712,674	-	209,000 ha	52km from Knoxville	Free entry	Ageing infrastructure, overcrowding	Mount LeConte (20km, overnight). The LeConte Lodge is located at the summit of the mountain, offering private or share cabins, family meals and wine available, lunch pack for walk down.	Le Conte Lodge is the only lodging within the national park. Campsites within the national park. Nearby motel and rental cabins outside of the national park.	Great Smoky Mountain Wheel (ferris wheel outside of the park open day and night) and Gatlinburg Space Needle (located outside of the park), Horse Riding
Grand Canyon National Park	5,520,736	83% domestic, 17% international	493,270 ha	406km from Las Vegas	USD \$30 per car	Lack of serenity due to overcrowding, poor signage, need for increased bus services and parking spaces.	Rim to Rim Hike (can be done in a day trip but there is lodging available. Hike 38 km and stay at the Grand Canyon Lodge, then hike back and can also stay at South Rim to recuperate. Hotel options are also available a short distance from the park.	Bright Angel Lodge, El Tovar Hotel, Kachina Lodge, Thunderbird Lodge, Maswik Lodge operated by Xanterra Parks and Resorts; Yavapai Lodge operated by Delaware North. Various inns and lodges are also located in Tusayan (11km south of Grand Canyon Village). Campgrounds are also available.	Grand Canyon Skywalk (glass bottom viewing platform), River tours, Riding mules



Site	Visitation ¹⁸⁹	Visitor Markets ¹⁹⁰	Size	Distance to closest main city ¹⁹¹	Entry Fees	Issues and Challenges ¹⁹²	Signature/Overnight Trails	Accommodation	Unique Experiences
Canadian Rocky Mountain Parks	4,270,000	84% domestic, 16% international	2,299,104 ha	108km from Calgary	Adult: CAD \$9.80 Child CAD \$4.90	Seasonality issues, with only 15% of visits occurring in the low season from Jan-Mar. Visa restriction impact inbound markets; informal trails being used	Skyline Trail (42km, 1-3 days). Tour with Great Canadian Trails, stay at a backcountry lodge (from CAD\$2590).	A range of accommodation options with the WHA. Eg. Fairmont Chateau Lake Louise (4-star resort) from AUD\$738 per night (lowest price from hotels.com), 13 campgrounds within Banff National Park.	Gondola ride up Sulphur Mountain, Horse riding, Rocky Mountaineer train luxury gold service, zip lining, river rafting, helicopter tour, glacier skywalk, Food lovers self-drive package
Historic Sanctuary of Machu Picchu	1,079,350	72% international, 28% domestic	38,160 ha	90km from Cusco	Adult: 128 Peruvian Nuevo Sol (USD \$38.19)	Increasing visitor numbers are not being matched by effective park management which is resulting in detrimental cultural and environmental impacts and degrading infrastructure; poor sanitary and safety conditions, visitor numbers are exceeding the agreed limit (by Peru and UNESCO) of 2,500 visitors per day.	The Inca Trail (82km, 4 days). Overnight option available to stay at Belmond Sanctuary Lodge (4-star. Prices from \$1,104) in Machu Picchu. Campsites available along track. Last campsite before Machu Picchu, there is a restaurant, and hot showers and toilets. Dormitory beds also available.	A range of hotel and motels are offered within the WHS. Eg Belmond Sanctuary Lodge from AUD\$1,104 per night (lowest price on hotels.com), Sumaq Machu Picchu hotel, Casa del Sol, Home Like Home. There are also various campsites available.	-
Te Wahipounamu – South West New Zealand	-	-	2,600,000 ha	89km from Christchurch to Franz Josef	Free entry	Illegal campsites, campers not aware of proper waste disposal, overcrowding at certain sites, limited accommodation.	Milford Track (53.5km one way, 4 days), Copland Track (2 days, 1 night - River terraces to bouldery riverbed, fuschia and ribbonwood forests. Soak in Welcome Flat hot pools, and stay overnight in Conservation Hut. Return following day)	5-star Fiordland Lodge with fine dining from AUD\$735 per night (lowest price on hotels.com); range of hotels in nearby Te Anau; huts in the national parks.	Helicopter tours, stand up paddle boarding, kayaking, canoeing, skydiving, glacier hot pools, horse riding, boat tours, fishing tours
Tongariro National Park	-	-	79,596 ha	225km from Hamilton	Free entry	-	Tongariro Alpine Crossing 19.4km (single day, but can stay overnight); Tongariro Northern Circuit (38km, 2 nights, tours starting from \$950 - hut accommodation. Hot spas offered as part of accommodation packages just outside of the National Park such as Adventure Lodge and Motel, when the trek has been completed)	Alpine Chalets, lodges and motels on the edge of the National Park. Huts and campsites within the National Park.	Scenic flights, horse riding, kayaking



11.6. Supporting Documentation 6 – Great Walks of Australia

The following table provides a summary of the Great Walks of Australia¹⁹³ and demonstrates:

- the national parks which they traverse through;
- if the trail enters a WHS; and
- the format of accommodation offered (including whether this is within or outside of a national park area).

Table 37: Great Walks of Australia

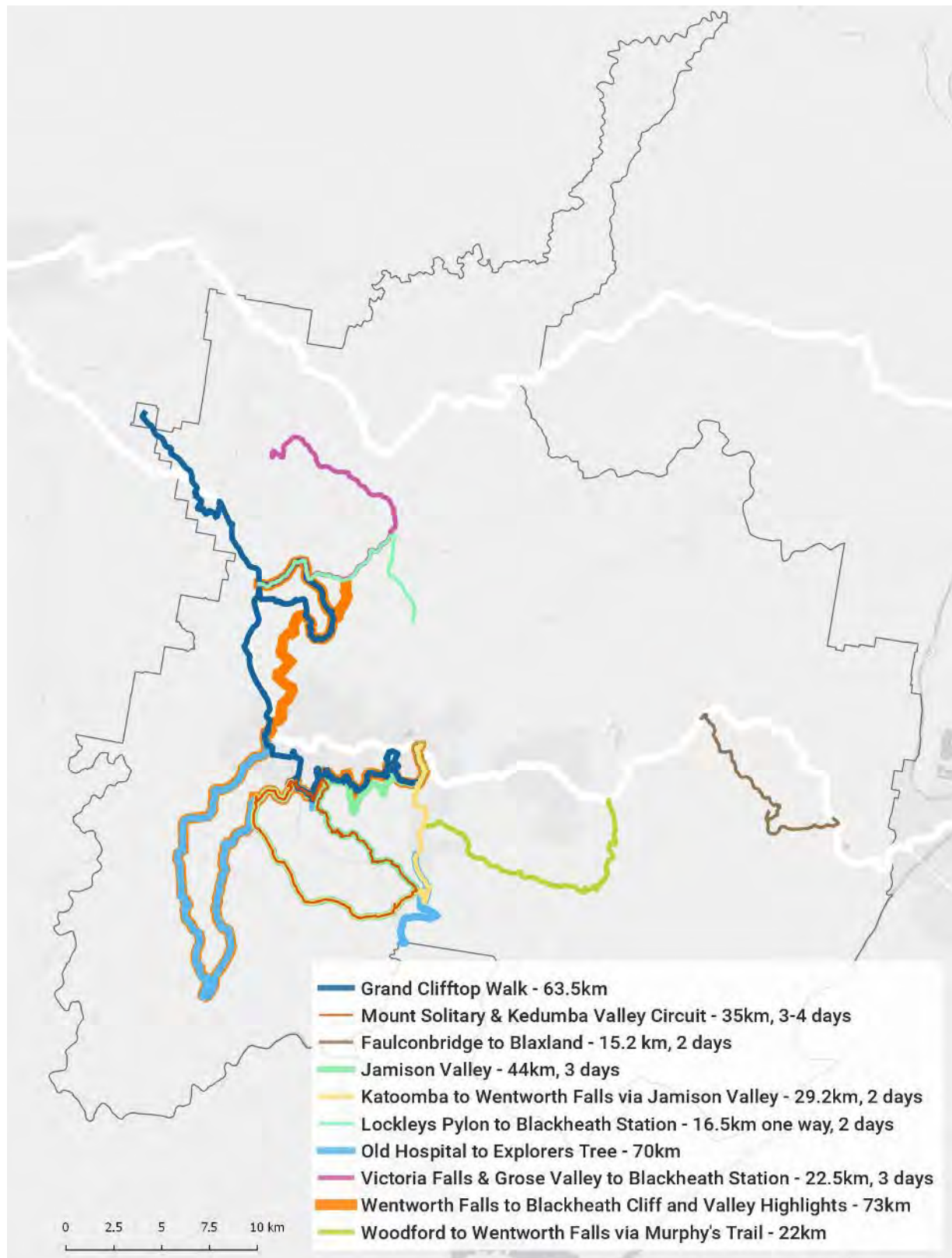
Walk	National Park	World Heritage Site	Accommodation In-Park
The Larapinta Trail	West MacDonnell National Park	Proposed (West MacDonnell Ranges)	Semi-permanent wilderness campsites. Hot showers etc. Dinner is provided. Don't need to carry food and camping gear etc. but provide regular tents.
Scenic Rim Trail	Main Range National Park	Gondwana Rainforests + Private	Spicers provide glamping but located outside the NP. Also, Spicers Peak Lodge has a luxury spa etc. but on private land. Only need to take day packs.
The Arkaba Walk	Flinders Ranges National Park	No	Wilpena Pound Resort has luxury glamping within the national park. Also, luxury homestead stay outside of the national park situated on an idyllic farm.
Twelve Apostles Lodge Walk	Great Otway and Port Campbell National Parks	No	Private eco-lodges with rainforest showers and foot spas (located outside of the National Park)
Bay of Fires Lodge Walk	Mount William National Park	No	Forester Beach Camp eco-lodge has special permission to operate within the National Park. Bay of Fires Lodge is just outside the National Park.
Freycinet Experience Walk	Freycinet National Park	No	Luxury Lodge (Freycinet Beaches Lodge) in a private sanctuary close to the National Park
The Maria Island Walk	Maria Island National Park	No	Luxury wilderness camps
Cradle Mountain Huts Walk	Cradle Mountain - Lake Sinclair National Park	Tasmanian Wilderness	Huts within National Park

¹⁹³ <http://greatwalksofaustralia.com.au>

11.7. Supporting Documentation 7 – Other Potential Commercial Trail Opportunities

A number of overnight Great Walk options have been considered. These are illustrated in Figure 82.

Figure 82: Great Walk Overnight Options





The following table ranks each of the Great Walk options based on whether they are located within the BMNP, it is possible for accommodation to be offered within the BMNP, difficulty, maximum group size, stunning scenery, if there is boring scenery or along the side of a road and length of the walk. The Mount Solitary & Kedumba Valley Circuit and the Jamison Valley walk each ranked first and scored 13 out of a possible 14.

Table 38: Great Walk Options Matrix

Option	Within BMNP	Accommodation within BMNP	Medium for 80%, hard for 20%	Guided Group of up to 20 pax	Stunning scenery	Not along a trail with boring scenery or along a road	1-3 nights	Total	Rank
Grand Clifftop Walk	1	0	2	2	2	1	0	8	12
Mount Solitary & Kedumba Valley Circuit	2	2	2	2	2	1	2	13	1
Faulconbridge to Blaxland	2	1	2	2	1	1	2	11	7
Katoomba to Wentworth Falls via Jamison Valley	2	2	2	2	2	0	2	12	4
Lockleys Pylon to Blackheath Station	1	1	0	0	2	2	2	8	12
Victoria Falls & Grose Valley to Blackheath Station	1	1	2	2	2	2	2	12	4
Woodford to Wentworth Falls via Murphy's Trail	1	1	2	2	0	0	2	8	12
Old Hospital to Explorers Tree	2	1	2	2	2	0	1	10	8
Wentworth Falls to Blackheath Cliff and Valley Heights	1	0	2	2	2	1	1	9	10
Jamison Valley	2	2	2	2	2	1	2	13	1
Gibraltar Rocks to Katoomba to Wentworth Falls	2	1	2	2	2	1	2	12	4
Katoomba to Kanangra Walls	2	2	2	2	2	1	2	13	1
Blackheath to Mount Hay Rd	1	1	2	2	1	1	2	10	8
Bruce's Walk	1	0	2	2	2	1	1	9	10

11.7.1. Grand Clifftop Walk

The Grand Clifftop Walk passes through 5 Blue Mountains villages: Wentworth Falls, Leura, Katoomba, Blackheath and Mount Victoria. It begins at Wentworth Falls Station and finishes at Mount York Lookout near Mount Victoria.

Figure 83 illustrates the Grand Clifftop Walk. Sections of the walk which occur along the edge of roads are shown in orange (13.5km), possible realignments to the trail are shown in green and alternate routes are shown in blue.

As shown in the figure, the majority of current commercial accommodation in the 5 villages lie within 500m of the Grand Clifftop Walk. However, in order to access these accommodation sites, hikers would need to leave the BMNP and enter into suburban environments, which may detract from their experience with nature. Additionally, increased pedestrian traffic along residential streets may not be welcomed by locals.

Figure 83: Grand Clifftop Walk Map





While the Grand Clifftop Walk offers spectacular scenery, it also requires walkers to walk alongside highways, train tracks and residential streets for 21% of the total walk, shown in Figures 84 and 85.

Figure 84: Grand Clifftop Walk Passing Next to the Train Line¹⁹⁴



Figure 85: Grand Clifftop Walk Passing Through Residential Streets¹⁹⁵



The pros and cons of the Grand Clifftop Walk are summarised below.

PROS:

- Spectacular experiences include Sublime Falls, Gordon Falls, Leura Cascades, National Pass, Ruined Castle, and the Grand Canyon
- Easily accessible to public transport

CONS:

- 21% of the walk occurs along the edge of the road or railway line
- Would require walkers to leave the BMNP for accommodation, detracting from the experience of nature
- Increased pedestrian traffic in residential streets which may upset local residents

¹⁹⁴ Google Street View

¹⁹⁵ Google Street View

11.7.2. Mount Solitary & Kedumba Valley Circuit

Mount Solitary & Kedumba Valley Circuit (Figure 86) offers spectacular experiences worthy of being considered a Great Walk. It includes passing the Three Sisters, Echo Point, Mount Solitary, Ruined Castle and has the option of stopping for a picnic and swim in the Kedumba Valley. The walk is 35km which is an appropriate length for a 3-4 day walk and is viable for walkers with a reasonable fitness level.

Figure 86: Mount Solitary & Kedumba Valley Circuit Map



Importantly, this site offers the potential for establishing low impact eco-friendly chalets or glamping. The proposed sites are either current campsites or have had historical development and hence developing these accommodation options would not degrade pristine wilderness areas.

The pros and cons of Mount Solitary & Kedumba Valley Circuit are summarised below.

PROS:

- Spectacular experiences include Three Sisters, Echo Point, Mount Solitary, Ruined Castle, picnic/swimming spot
- Proposed sites for glamping are either current campsites or have had historical development
- Length is 35km which would be suitable for a 3-4 day walk

- The walk is a circuit, meaning that walkers will not have to back-track
- Viable for walkers with a reasonable level of fitness

CONS:

- Vehicle access not currently permitted to Kedumba Valley Farm – if this were to be permitted, the middle night could be a supported camp and would make the

walk more viable from a commercial point of view in terms of pack weights

- Increased parking at Scenic World, which could be lessened by extending car parks within the proposed tourism precinct

11.7.3. Faulconbridge to Blaxland

While the Faulconbridge to Blaxland Walk has the advantages of having scenic views and being easily accessible by public transport, the walk was not considered to have an adequate length, as it is recommended to be walked in 2 days.

The pros and cons of the Faulconbridge to Blaxland Walk are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Scenic forest and vegetation, Sassafras Creek, St Helena's Waterfall, Victory Track Pool Easily accessible by public transport 	<ul style="list-style-type: none"> The walk is shorter than the other options being only 2 days

11.7.4. Jamison Valley (Variation of Wentworth Falls to Katoomba via Jamison Valley)

The Jamison Valley could be extended as a circuit however this would cause backtracking east of Leura. Without this circuit, walkers will finish at Scenic World, which is problematic if they have left cars near Wentworth Falls.

The pros and cons of the Jamison Walk are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular experiences include Mount Solitary, Ruined Castle, picnic/swimming spot Proposed sites for glamping are either current campsites or have had historical development 	<ul style="list-style-type: none"> If the walk is extended to a circuit, there will be backtracking east of Leura. If the walk finishes at Scenic World, it will be difficult for car drivers to get back to Wentworth Falls. The length of the walk is slightly long (>40km)

11.7.5. Katoomba to Wentworth Falls via Jamison Valley

The Katoomba to Wentworth Falls via Jamison Valley walk includes spectacular views of the Three Sisters, Mount Solitary and Ruined Castle, however, the section from the falls at Wentworth Falls to Kedumba Pass does not offer spectacular scenery.

The pros and cons of Katoomba to Wentworth Falls via Jamison Valley are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular experiences include Three Sisters, Mount Solitary, Ruined Castle Viable for walkers with a reasonable level of fitness 	<ul style="list-style-type: none"> Wentworth Falls to Kedumba Pass section does not offer spectacular scenery

11.7.6. Lockleys Pylon to Blackheath Station

Lockleys Pylon to Blackheath Station is problematic due to: the remoteness of the starting location; it is physically demanding with one of the steepest ascents and descents in the Blue Mountains; and there is a need for track maintenance.

The pros and cons of Lockleys Pylon to Blackheath Station are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Easy departure, with the walk finishing at Blackheath Station 	<ul style="list-style-type: none"> One of the steepest ascents and descents in the Blue Mountains Drop off point is remote – Difficult roads mean that only small vehicles capable of carrying a maximum of 12 people can enter The conservation history of Acacia Flat means that it is unlikely that huts could be established The track needs to be upgraded as there are current maintenance issues

11.7.7. Old Hospital to Explorers Tree

The Old Hospital to Explorers Tree walk includes spectacular views of the Three Sisters and includes the historical Old Queen Victoria Hospital and Explorers Tree. However, the section from the falls at Wentworth Falls to Kedumba Pass does not offer spectacular scenery and the length of the track is 70km long.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular views of the Three Sisters, history of the Old Queen Victoria Hospital and Explorers Tree 	<ul style="list-style-type: none"> Wentworth Falls to Kedumba Pass section does not offer spectacular scenery The length of the walk is long (>70km)

11.7.8. Victoria Falls & Grose Valley to Blackheath Station

While Victoria Falls & Grose Valley to Blackheath Station has spectacular scenery and follows the Grose River, with an option of diverting to the Grand Canyon, there is a lack of suitable accommodation sites where eco-friendly chalets or low-impact glamping could be established.

The pros and cons of Victoria Falls & Grose Valley to Blackheath Station are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular vegetation, history, views and Grose River Option of diverting to the Grand Canyon Viable for people with a reasonable level of fitness Easy departure, with the walk finishing at Blackheath Station 	<ul style="list-style-type: none"> The conservation history of Acacia Flat means that it is unlikely that huts could be established

11.7.9. Wentworth Falls to Blackheath Cliff & Valley Highlights

While Wentworth Falls to Blackheath Cliff & Valley Highlights includes spectacular views of the Three Sisters, Grand Canyon and Govetts Leap, it would require accommodation to be located outside of the BMNP, which may detract from the experience of nature and may also increase pedestrian traffic on residential streets. Infrastructure upgrades are also likely to be needed.

The pros and cons of Wentworth Falls to Blackheath Cliff are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular scenery including Echo Point, Three Sisters, Grand Canyon, Govetts Leap 	<ul style="list-style-type: none"> Would require walkers to leave the BMNP for accommodation, detracting from the experience of nature Increased pedestrian traffic in residential streets which may upset local residents Too long (>70km) Would require a bridge crossing the Great Western Highway

11.7.10. Woodford to Wentworth Falls via Murphy's Trail

The Woodford to Wentworth Falls via Murphy's Trail is problematic as it does not offer spectacular scenery and motor vehicles use this trail.

The pros and cons of Woodford to Wentworth Falls via Murphy's Trail are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> n/a 	<ul style="list-style-type: none"> Does not offer spectacular scenery Motor vehicles use this trail

11.7.11. Gibraltar Rocks to Katoomba to Wentworth Falls

The pros and cons of Gibraltar Rocks to Katoomba to Wentworth Falls are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Impressive Views of the Kanimbla Valley, Ruined Castle, Mount Solitary 	<ul style="list-style-type: none"> Uses some fire trails There is a possibility that hotel/motel accommodation will be needed in Katoomba

11.7.12. Katoomba to Kanangra Walls

The pros and cons of Katoomba to Kanangra Walls are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Wilderness experience 	<ul style="list-style-type: none"> Within Wilderness Area under the Wilderness Act 1987 Walk extends outside of Blue Mountains LGA

11.7.13. Blackheath to Mount Hay Rd

The pros and cons of Blackheath to Mount Hay Rd are summarised below.

PROS:	CONS:
<ul style="list-style-type: none"> Spectacular experiences include Grand Canyon, Govetts Leap and Grose Valley 	<ul style="list-style-type: none"> Within Wilderness Area under the Wilderness Act 1987 Walk occurs along some roads which may detract from the experience of nature

11.7.14. Bruce's Walk

The pros and cons of Bruce's Walk are summarised below.

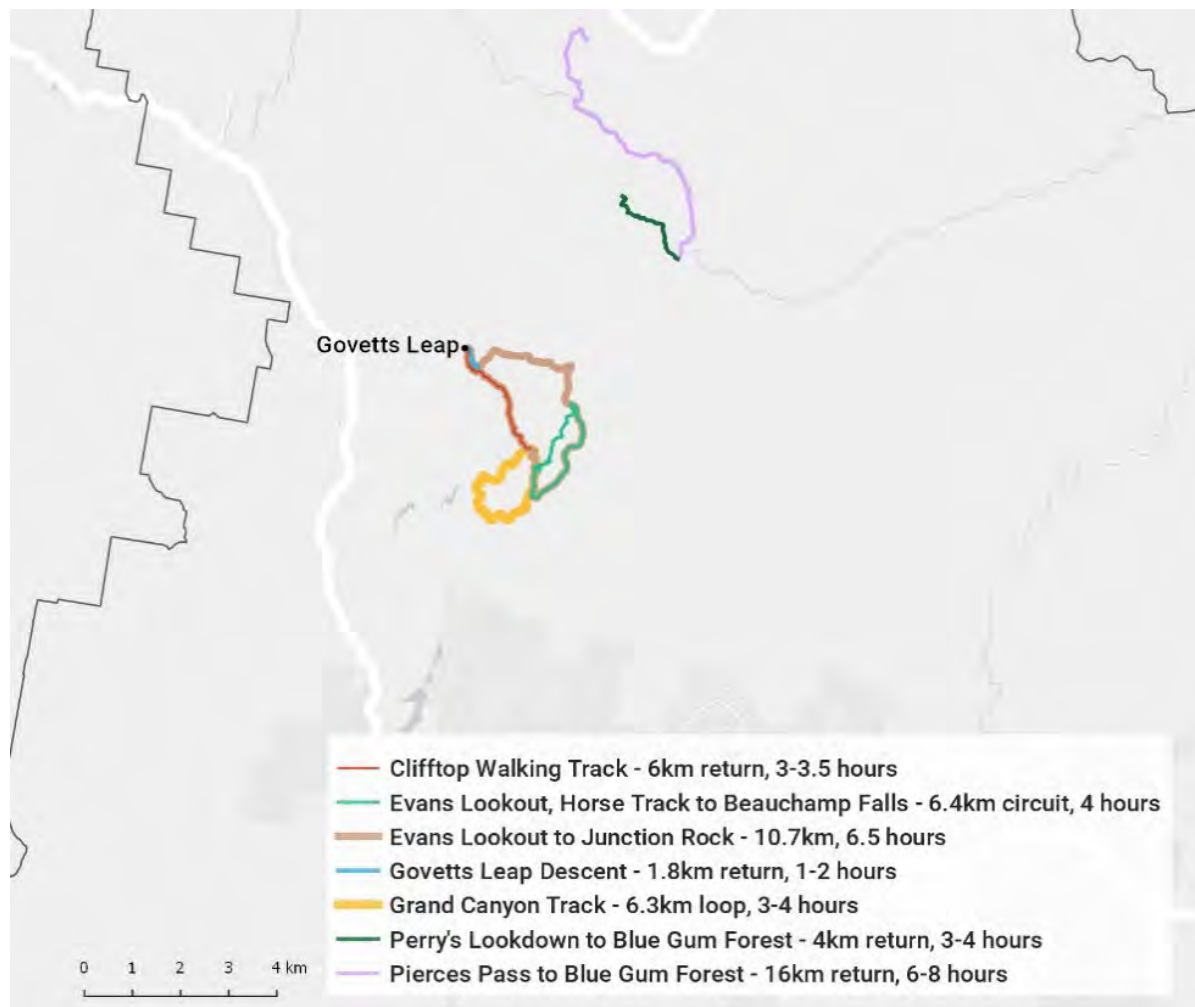
PROS:	CONS:
<ul style="list-style-type: none"> Spectacular experiences include Grand Canyon Historically significant 	<ul style="list-style-type: none"> Trail is not well maintained Track is on numerous parcels of private tenure

11.7.15. Shorter Walks

While the following walks (shown in the figure overleaf) are excellent half day/ full day options, the following tracks were discounted from being Great Walk options because they were not an appropriate length for an overnight trek:

- | | |
|---|---|
| <ul style="list-style-type: none"> Cliff-top Walking Track (near Blackheath) – 6km return, 3-3.5 hours Evans Lookout, Horse Track to Beauchamp Falls – 6.4km circuit, 4 hours Evans Lookout to Junction Rock – 10.7km, 6.5 hours Govetts Leap Descent – 1.8km return, 1-2 hours | <ul style="list-style-type: none"> Grand Canyon Track – 6.3km loop, 3-4 hours Perry's Lookdown to Blue Gum Forest – 4km return, 3-4 hours Pierces Pass to Blue Gum Forest – 16km return, 6-8 hours |
|---|---|

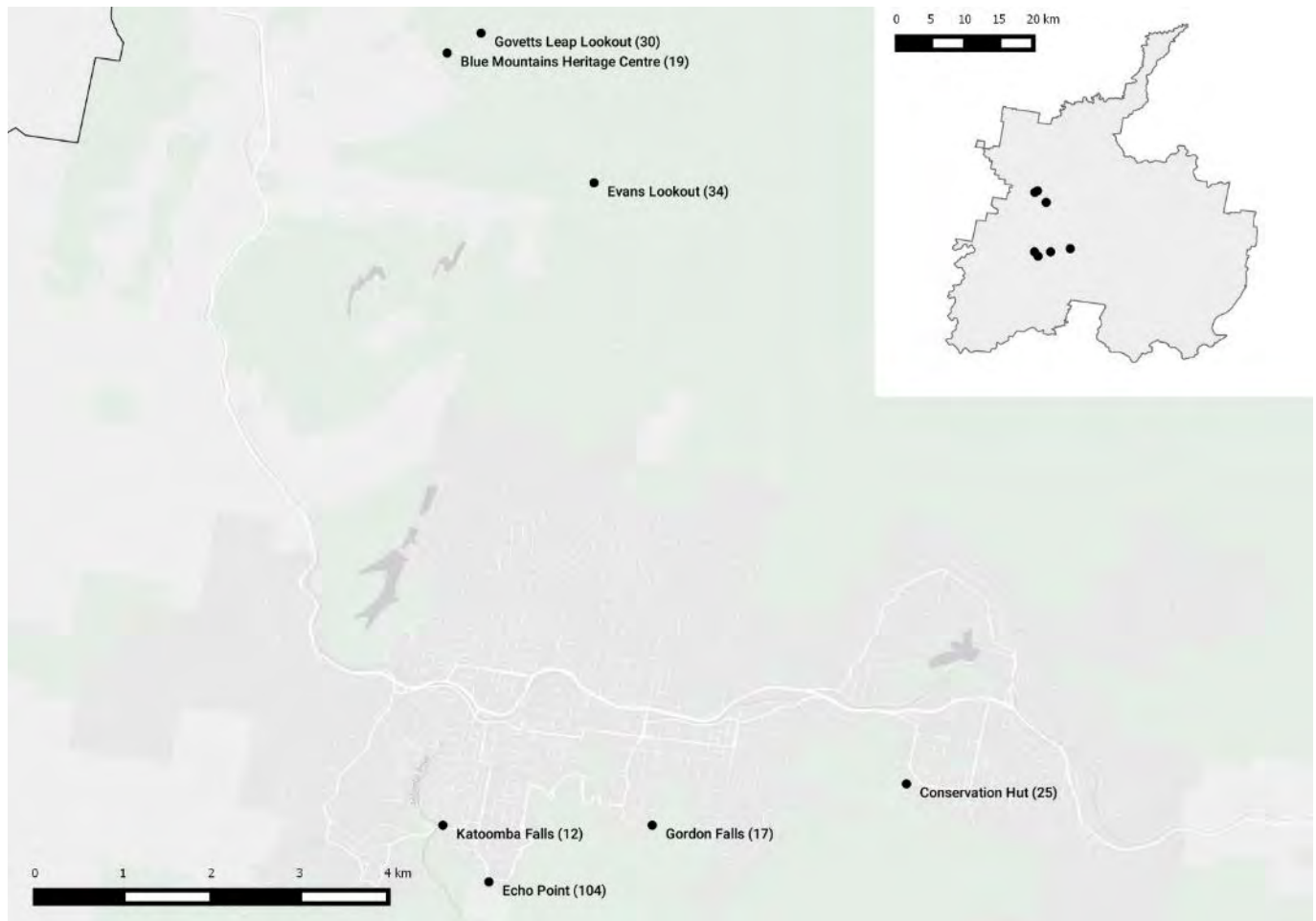
Figure 87: Shorter Walks



11.7.16. Available Parking Near Trails

The following figure illustrates the parking spaces available at car parks near popular tourist trails. At present, there are 27 pay and display parking meters and these are all located at Echo Point. These generate \$700,000 in revenue per annum.¹⁹⁶

Figure 88: Selected Car parks for Tourist Areas¹⁹⁷

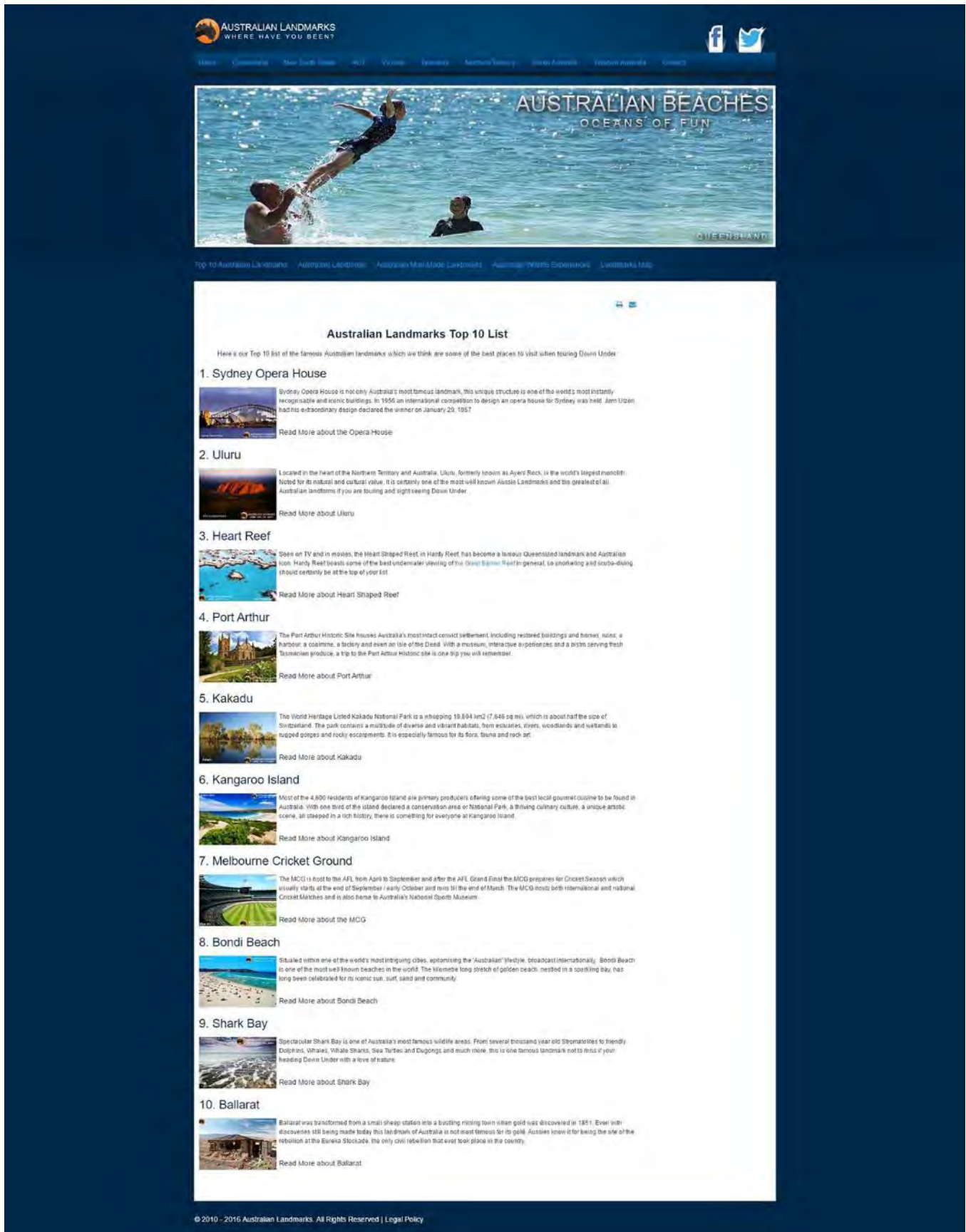


¹⁹⁶ Pay and Display Framework, June 2016, Blue Mountains City Council

¹⁹⁷ Car parking spaces were estimated using Google Maps and Google Street View. The Echo Point figure includes street parking within 300m walking distance from the lookout. Based on data from ABS, Esri, HERE, DeLorme, © OpenStreetMap contributors, and the GIS user community.

11.8. Supporting Documentation 8 – Attractions/Destinations Ranking

Figure 89: Australian Landmarks.com – Top 10 List



The screenshot displays the Australian Landmarks.com website. At the top, there is a navigation bar with links for Home, Commercial, New South Wales, ACT, Victoria, Queensland, Northern Territory, Western Australia, Eastern Australia, and Contact. A large banner image shows people swimming in the ocean with the text "AUSTRALIAN BEACHES OCEANS OF FUN" and "QUEENSLAND". Below the banner, there is a section titled "Australian Landmarks Top 10 List". The list includes the following landmarks:

- 1. Sydney Opera House**: Sydney Opera House is not only Australia's most famous landmark, this unique structure is one of the world's most instantly recognisable and iconic buildings. In 1956 an international competition to design an opera house for Sydney was held. Jørn Utzon had his extraordinary design declared the winner on January 29, 1957. [Read More about the Opera House](#)
- 2. Uluru**: Located in the heart of the Northern Territory and Australia, Uluru, formerly known as Ayers Rock, is the world's largest monolith. Noted for its natural and cultural value, it is certainly one of the most well known Aussie Landmarks and the greatest of all Australian landforms if you are touring and sightseeing Down Under. [Read More about Uluru](#)
- 3. Heart Reef**: Seen on TV and in movies, the Heart Shaped Reef in Hardy Reef has become a famous Queensland landmark and Australian icon. Hardy Reef boasts some of the best underwater viewing of the Great Barrier Reef in general, so snorkelling and scuba-diving (you can certainly be at the top of your list). [Read More about Heart Shaped Reef](#)
- 4. Port Arthur**: The Port Arthur Historic Site houses Australia's most intact convict settlement, including restored buildings and houses, ruins, a harbour, a coastline, a factory and even an Isle of the Dead. With a museum, interactive experiences and a pub serving fresh Tasmanian produce, a trip to the Port Arthur Historic site is one trip you will remember. [Read More about Port Arthur](#)
- 5. Kakadu**: The World Heritage Listed Kakadu National Park is a whopping 19,804 km² (7,646 sq mi), which is about half the size of Switzerland. The park contains a multitude of diverse and vibrant habitats, from estuaries, rivers, woodlands and wetlands to rugged gorges and rocky escarpments. It is especially famous for its flora, fauna and rock art. [Read More about Kakadu](#)
- 6. Kangaroo Island**: Most of the 4,800 residents of Kangaroo Island are primary producers offering some of the best local gourmet cuisine to be found in Australia. With one third of the island declared a conservation area or National Park, a thriving culinary culture, a unique artistic scene, all steeped in a rich history, there is something for everyone at Kangaroo Island. [Read More about Kangaroo Island](#)
- 7. Melbourne Cricket Ground**: The MCG is host to the AFL from April to September and after the AFL Grand Final the MCG prepares for Cricket Season which usually starts at the end of September/early October and runs to the end of March. The MCG hosts both international and national Cricket Matches and is also home to Australia's National Sports Museum. [Read More about the MCG](#)
- 8. Bondi Beach**: Situated within one of the world's most intriguing cities, epitomising the 'Australian' lifestyle, broadcast internationally, Bondi Beach is one of the most well known beaches in the world. The kilometre long stretch of golden beach, nestled in a sparkling bay, has long been celebrated for its iconic sun, surf, sand and community. [Read More about Bondi Beach](#)
- 9. Shark Bay**: Spectacular Shark Bay is one of Australia's most famous wildlife areas. From several thousand year old Stromatolites to trendy Dolphins, Whales, White Sharks, Sea Turtles and Dugongs and much more, this is one famous landmark not to miss if you're heading Down Under with a love of nature. [Read More about Shark Bay](#)
- 10. Ballarat**: Ballarat was transformed from a small sheep station into a budding mining town when gold was discovered in 1851. Even with discoveries still being made today this landmark of Australia is not most famous for its gold. Aussies know it for being the site of the rebellion at the Eureka Stockade, the only civil rebellion that ever took place in the country. [Read More about Ballarat](#)

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Figure 90: CNN Travel – Top 10 Natural Wonders of Australia

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10 natural wonders of Australia

Only Uluru and the Great Barrier Reef were finalists in the New 7 Wonders of Nature poll, but here's Australia's top 10

12 September, 2011

Great Barrier Reef

Underwater view of the world's largest living thing, the Great Barrier Reef, Queensland.

Only the Great Barrier Reef and Uluru were in the 28 finalists for New 7 Wonders of Nature. Neither were included in the final list, judged by an estimated 1 million people around the world.

Of the 259 nominations from 222 countries in the original list, 13 were from Australia.

But although Australia doesn't have bragging rights of a new wonder, they still worth a visit. They're not going anywhere just yet.

Here are 10 of Australia's natural wonders.

1. Great Barrier Reef
2. Uluru
3. Shark Bay
4. The Pinnacles
5. Twelve Apostles
6. MacKenzie Falls
7. Fraser Island
8. Kakadu
9. Blue Mountains
10. Bungle Bungles

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Figure 91: Escape.com.au – Top 10 Aussie Bucket-List Destinations

Sunday Telegraph Sunday Herald Sun Sunday Times Sunday Mail (Brisbane) Sunday Mail (Adelaide) Sunday Tasmanian

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TRAVEL NEWS

TOP 10 AUSSIE BUCKET-LIST DESTINATIONS

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January 21, 2015 9:42am

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Uluru has taken out the crown as Australia's number one bucket list destination in a survey by travel website lastminute.com.au.

According to the survey of more than 4100 Australians, the top 10 Aussie bucket list destinations that people intend to visit one day are:

1. Uluru, Northern Territory
2. Great Barrier Reef, Queensland
3. The Kimberley, Western Australia
4. The Whitsundays, Queensland
5. Kaladju National Park, Northern Territory
6. Margaret River Region, Western Australia
7. Lord Howe Island, NSW
8. Wineglass Bay, Tasmania
9. Great Ocean Road, Victoria
10. Kangaroo Island, South Australia





Lastminute.com.au spokesman Louise Ryan says: "Is there anything more Australian than wanting to visit Uluru? Its rich red desert sands, champagne-worthy sunsets, not to mention its incredible spiritual presence; it's an outback journey every Aussie should make.

"However, it's important to also note that the other contenders on the bucket list really highlight the diversity we have on our own doorstep and how lucky we are to live in Australia.





"Whether you are after a beach escape, food and wine indulgence, outback adventure, good old fashion road trip, or tropical paradise, our island home has it covered for bucket list travellers."

Go all out this Australia Day and plan a 2015 Aussie bucket list holiday to one of these amazing spots:

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Figure 92: Google – Top Australian Destinations

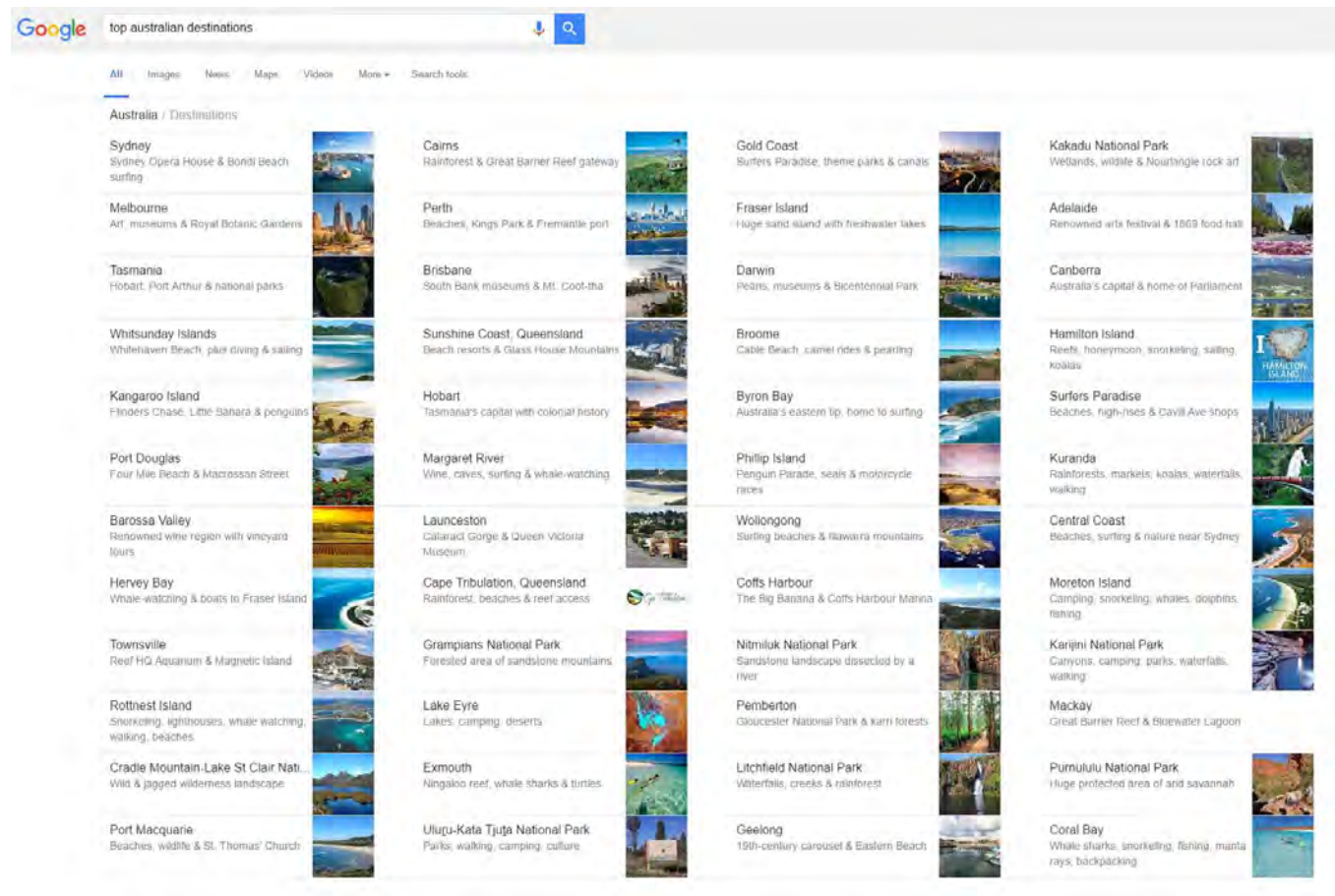


Figure 93: Lonely Planet – Ultimate Travel List

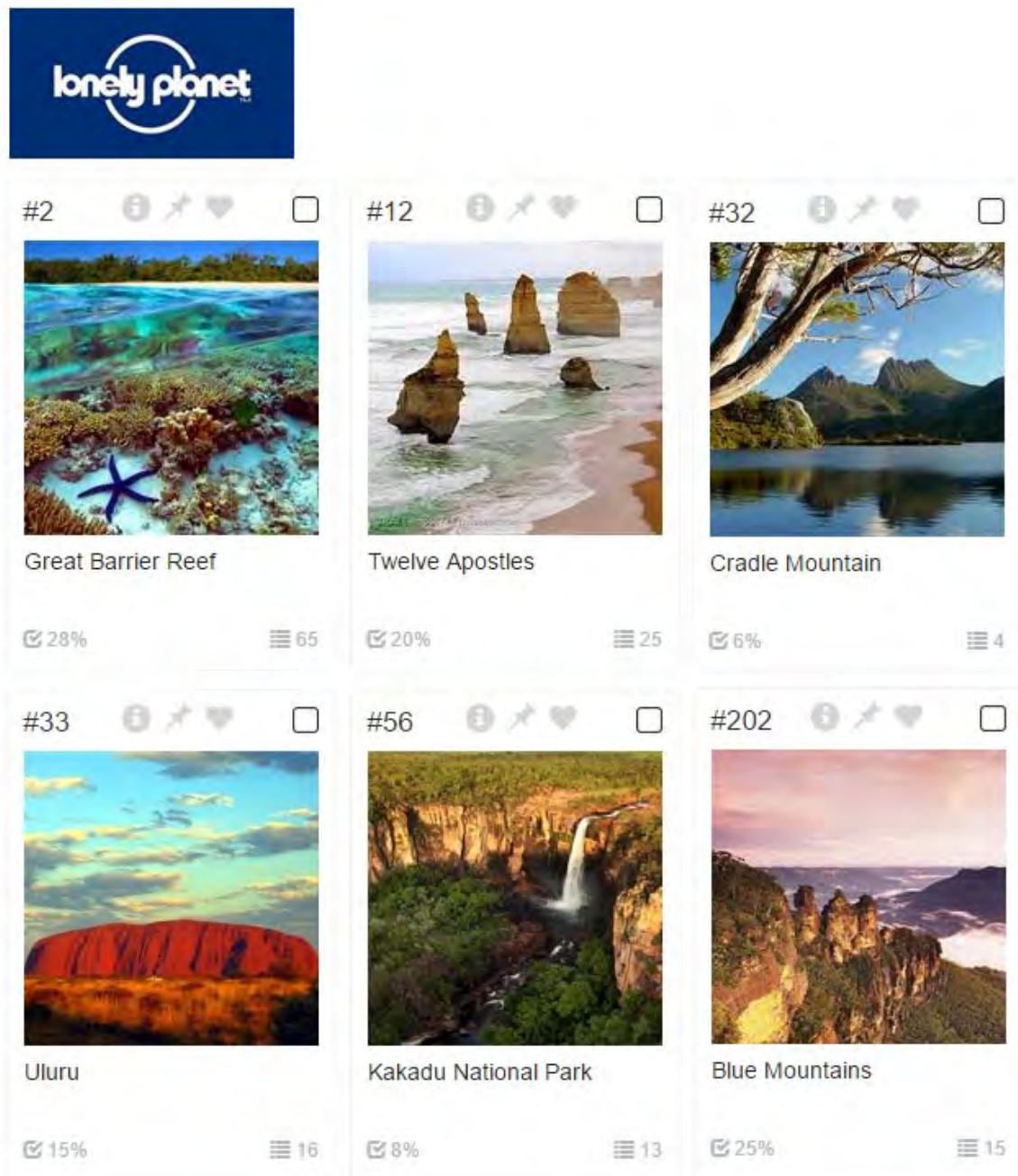


Figure 94: The Telegraph (UK) – Top Things to do in Australia

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Top 10 things to do in Australia


With so many wondrous landmarks to see in Australia, it can be difficult knowing where to start. Here are 10 of the best attractions Down Under


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- 


1 The Great Ocean Road in Victoria is one of Australia's definitive wonders, a dazzling, heart-stopping, 150-mile drive along the hemline of the continent. The climax is the Twelve Apostles, where the raging Southern Ocean has gnawed the limestone cliffs to leave tall pillars of more resilient rock stranded out at sea.
- 


2 Towards the end-of-dry season, the birds and reptiles of Kakao National Park in the Northern Territory are crammed into ever shrinking wetlands. The most spectacular is Yellow Waters Lagoon, which becomes an open-air zoo. Sign up for a cruise: expect close encounters with white egrets, brolgas, jabirus, sea eagles, jacanas, pelicans, snake birds, gannets and crocodiles.
- 


3 Take a BridgeClimb to the dizzying heights of the Sydney Harbour Bridge for a 360-degree panorama of the world's greatest harbour. Wearing a special Bridgeseat, harness and communication gear, climb ascend the bridge's arch for the ultimate city view, 400ft above sea level.
- 


4 A delicious, soul-stealing journey, the 120-mile drive between Cape Naturaliste and Cape Leeuwin in Western Australia knits together national parks, vineyards and a coastline of extraordinary beauty in a showcase of Australia's diversity. At its best in spring, when the landscape erupts with wild flowers, but the Margaret River wineries dazzle all year round.
- 

5 Operated by the local Aboriginal community, the Ngakuru Dreamtime Walk offers an indigenous perspective on the rawest wonders of the dramatically beautiful Kooragang Gorge in Queensland's tropical north, source of food, medicine and spiritual sustenance for the local Kuuku Yalanji people.
- 

6 Experience sunset in the Flinders Ranges, South Australia. Evening brings a crowd to the Prairie Hotel in Parachina for a sunset that draws a multi-coloured curtain across the desert sky. The Prairie is known for its wicked hummock, a mound that relies on "the leral mixed gas" and a clientele that ranges from cowboys to filmmakers in search of outback verté.
- 

7 The Great Barrier Reef off the Queensland coast is one of Mother Nature's most dazzling creations, a labyrinth of coral cays, islands, lagoons, channels and caverns furnished with an amazing variety of marine life. All you need do is put on a mask and snorkel, lie face down in the water and remember to breathe.
- 

8 Nothing distinguishes a city like a tram, and Melbourne's No 96 does it beautifully. In its nine-mile journey from the north of the city, across its heart and south to beachside St Kilda, the ride stitches together some of the city's icons, including the Melbourne Museum, Exhibition Buildings, Carlton Gardens, State Parliament, the Bourke Street Mall and Luna Park.
- 

9 Sunset over the rust-red flanks of Uluru in Australia's Red Centre is a magic moment, and better still when viewed from a camel's back. Your mount can even deliver you to a Sounds of Silence dinner where you'll enjoy a romantic meal in a sea of darkness beneath a canopy of stars.
- 

10 Breakfast at Bondi – Australia's most famous beach is where Sydney sheds its clothes and most of its inhibitions. Get there early to see the workout tribes in action, stay for breakfast at one of the beachfront cafes and top it off with a swim, or even a surf lesson.

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11.9. Supporting Documentation 9 - Tourism Related Planning Principle Concepts

The following schematics are provided to merely offer examples of how tourism related planning principles and concepts could be activated to deliver stronger connectivity between key sites and destinations. Whilst the treatment suggested in Figure 95 may be challenging to activate because of its likely cost and potential traffic constraints, it could be focussed on a smaller area, such as out the front of Carrington Place and at the top end of the street linking to the Katoomba Railway Station. Such changes could offer significant support to help visitors with a stronger “sense of arrival”, to offer a more comfortable pedestrian friendly link from the railway station to the main street of Katoomba, and to support improved way finding and links to the BMCC, amongst other key sites. Over time, the concept could be expanded as Council sees fit.

Figure 95: Need for Strong Connectivity Linking Sites

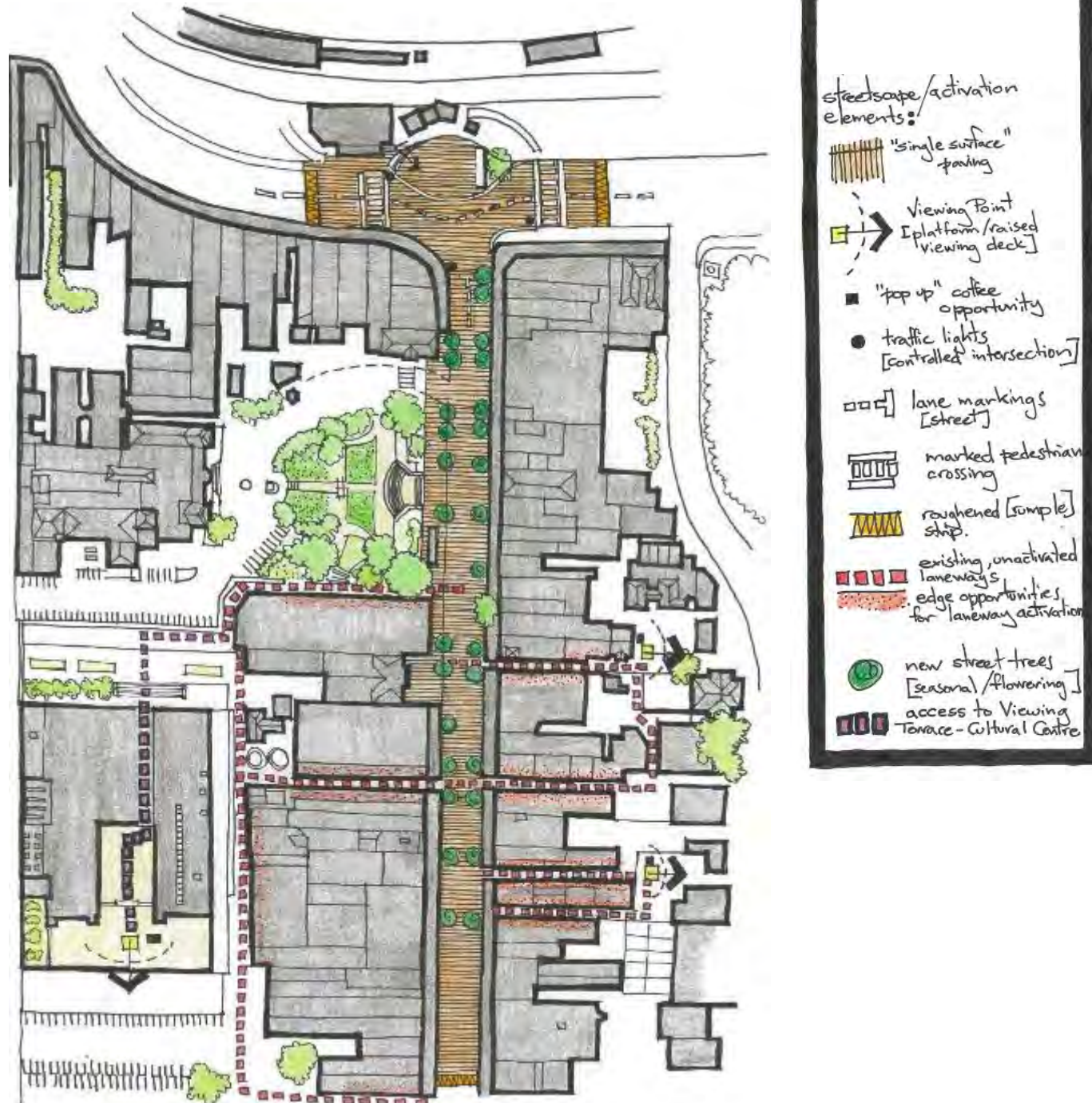


Figure 96: Tourism Streetscape 1



Figure 97: Tourism Streetscape 2



Figure 98: Footpath Relationship Concept

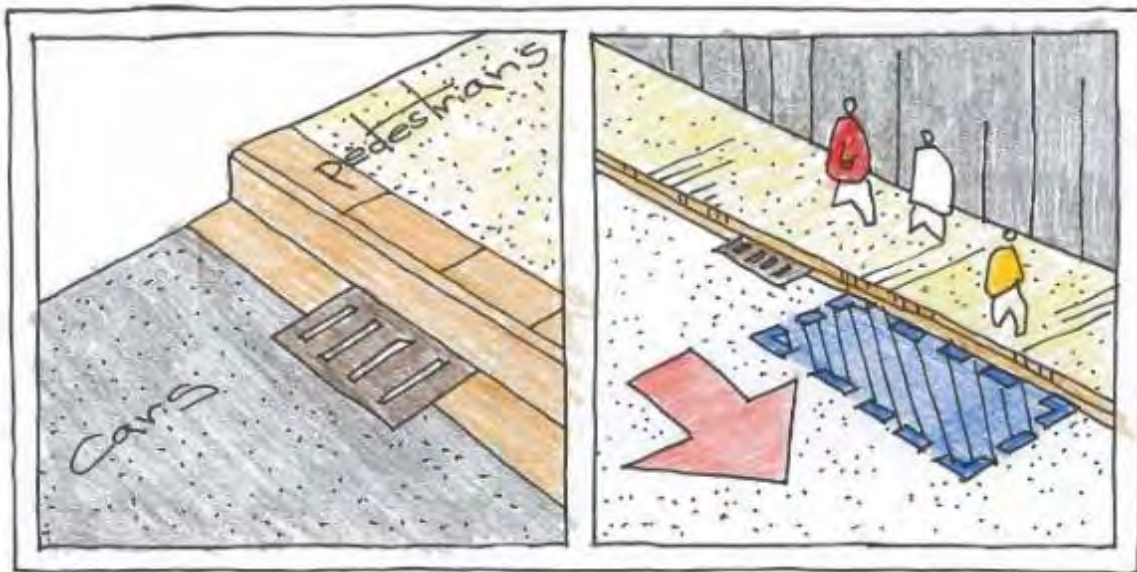


Figure 99: Shared Surface Concept

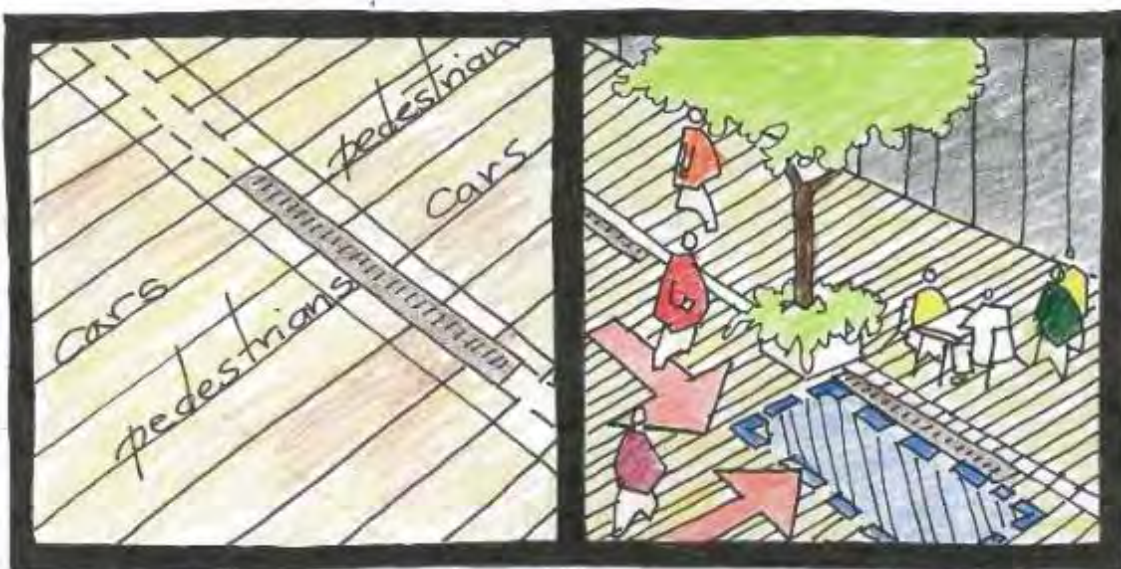


Figure 100: Public Realm – Laneway Transformation Concept



Figure 101: Public Realm Improvements – Laneway Lookout Concept

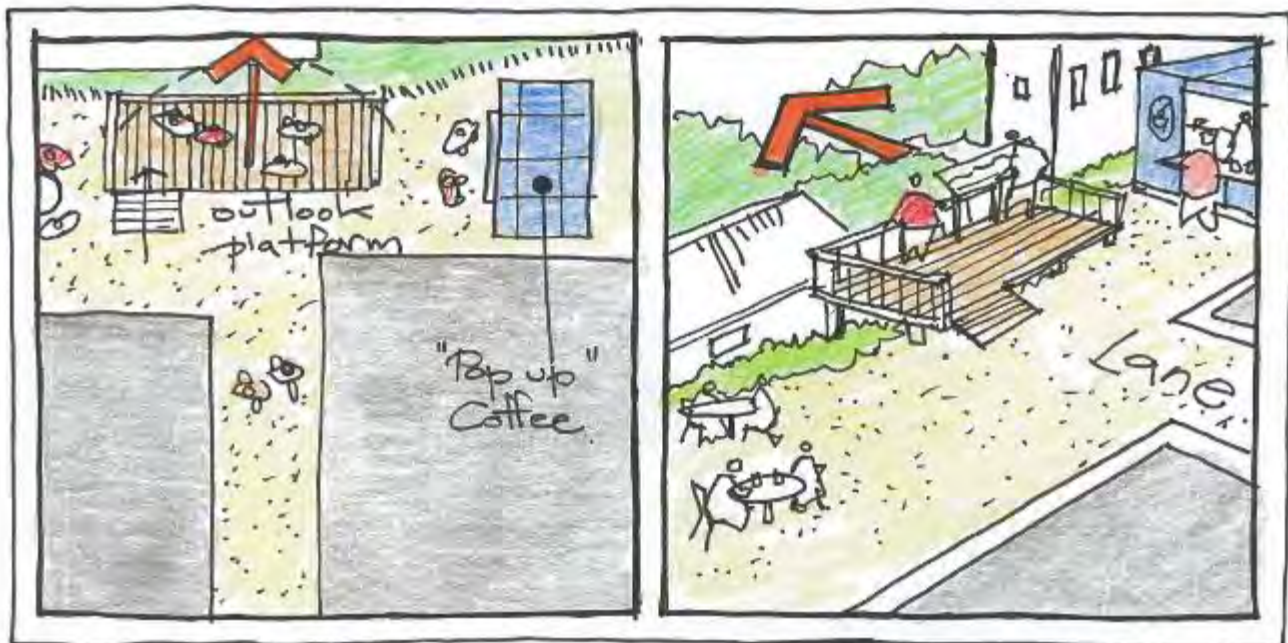


Figure 102: Public Parks – Tourism Enhancements



11.10. Supporting Documentation 10 – Visitor Forecasts

Table 39: Visitor Forecasts

	2015a	2016f	2017f	2018f	2019f	2020f	2021f	2022f	2023f	2024f	2025f	Total Change	Change %
Low Growth													
Domestic Day	1.53m	1.25%	1.25%	1.30%	1.10%	1.10%	1.10%	1.00%	1.00%	1.00%	1.00%		
		1.55m	1.57m	1.59m	1.61m	1.63m	1.65m	1.66m	1.68m	1.70m	1.71m	160k	10%
Domestic Overnight	523k	1.50%	1.50%	1.25%	1.20%	1.10%	1.10%	1.00%	1.00%	1.00%	1.00%		
		531.13k	539.10k	545.84k	552.39k	558.47k	564.61k	570.25k	575.96k	581.72k	587.53k	56k	11%
International Day	960k	1.25%	1.40%	1.40%	1.45%	1.50%	1.25%	1.20%	1.00%	1.00%	1.00%		
		972.00k	985.61k	999.41k	1.01m	1.03m	1.04m	1.05m	1.07m	1.08m	1.09m	114k	12%
International Overnight	51k	1.10%	1.10%	1.10%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%	1.00%		
		51.10k	51.66k	52.23k	52.75k	53.28k	53.81k	54.35k	54.89k	55.44k	56.00k	5k	10%
Total	3.1m	3.1m	3.1m	3.2m	3.2m	3.3m	3.3m	3.3m	3.4m	3.4m	3.4m	336k	11%
Medium Growth													
Domestic Day	1.53m	2.00%	2.00%	2.00%	1.50%	1.50%	1.50%	1.35%	1.35%	1.35%	1.35%		
		1.56m	1.60m	1.63m	1.65m	1.68m	1.70m	1.72m	1.75m	1.77m	1.80m	231k	15%
Domestic Overnight	523k	2.03%	2.03%	1.69%	1.62%	1.49%	1.49%	1.35%	1.35%	1.35%	1.35%		
		533.88k	544.69k	553.88k	562.86k	571.21k	579.70k	587.52k	595.45k	603.49k	611.64k	78k	15%
International Day	960k	2.50%	2.50%	2.50%	2.00%	2.00%	2.00%	1.75%	1.75%	1.75%	1.35%		
		984.00k	1.01m	1.03m	1.05m	1.08m	1.10m	1.12m	1.14m	1.16m	1.17m	187k	19%
International Overnight	51k	1.49%	1.49%	1.49%	1.35%	1.35%	1.35%	1.35%	1.35%	1.35%	1.35%		
		51.29k	52.05k	52.83k	53.54k	54.26k	55.00k	55.74k	56.49k	57.25k	58.03k	7k	13%
Total	3.1m	3.1m	3.2m	3.3m	3.3m	3.4m	3.4m	3.5m	3.5m	3.6m	3.6m	503k	16%
High Growth													
Domestic Day	1.53m	3.75%	3.75%	3.13%	3.00%	2.75%	2.75%	2.50%	2.50%	2.50%	2.50%		
		1.59m	1.65m	1.70m	1.75m	1.80m	1.85m	1.90m	1.95m	1.99m	2.04m	452k	28%
Domestic Overnight	523k	4.05%	4.05%	4.00%	7.00%	7.50%	7.50%	7.00%	7.00%	6.00%	6.00%		
		544.48k	566.53k	589.19k	630.43k	677.72k	728.54k	779.54k	834.11k	884.16k	937.21k	393k	72%
International Day	960k	5.00%	5.00%	5.00%	4.00%	4.00%	4.00%	3.50%	3.50%	3.50%	2.70%		
		1.01m	1.06m	1.11m	1.16m	1.20m	1.25m	1.29m	1.34m	1.39m	1.42m	415k	41%
International Overnight	51k	2.97%	3.30%	3.50%	8.00%	8.50%	8.50%	7.50%	7.00%	6.00%	6.00%		
		52.04k	53.76k	55.64k	60.09k	65.20k	70.74k	76.05k	81.37k	86.25k	91.43k	39k	76%
Total	3.1m	3.2m	3.3m	3.5m	3.6m	3.7m	3.9m	4.0m	4.2m	4.4m	4.5m	1.30m	41%

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