

DESTINATION MANAGEMENT PLAN 2018/19-2022/23



Contents

Mayor's message	4
Chief Executive Officer's message	5
Executive Summary	7
1. Introduction	9
1.1 Redefining the Visitor Economy	10
1.2 Why a Destination Management Plan?	11
1.3 Developing the Destination Management Plan	11
1.4 The Role of Local Government	12
2. Policy Framework	14
2.1 Links to Other Planning Initiatives	15
2.2 Links to the Community Strategic Plan	16
3. Liverpool Destination Analysis	18
3.1 Visitor Landscape	19
3.2 Tourism Assets	20
3.3 Liverpool Region Strengths and Assets	22
3.4 Liverpool Region Weaknesses	23
3.5 Future Liverpool Region Opportunities	24
3.6 Demographics	25
4. Destination Vision and Directions	27
4.1 Promote	28
4.2 Support	30
4.3 Celebrate	32
4.4 Attract	34
4.5 Leverage	36
5. Monitoring and Reporting	38
6. Action Plan	40
7. References	56
8. Appendix 1— Urbis Report 2017	57

Mayor's Message



WENDY WALLER
MAYOR

Liverpool has so much to offer residents and visitors alike. Our multicultural culinary and retail offerings, our arts scene, history and burgeoning education sector make Liverpool truly special.

This Destination Management Plan encapsulates our vision to become a place locals are proud to call home; celebrating and sharing our diversity, heritage and nature.

We want to showcase and celebrate Liverpool's people, rich cultural diversity, heritage, natural assets and events.

We are fortunate to be home to the Casula Powerhouse Arts Centre – already one of NSW's best arts facilities and its reputation grows with every world-class show, event and program it hosts.

Natural assets like Chipping Norton Lake and Bents Basin, coupled with the culinary and retail attractions of our walkable city, are part of Liverpool's broad offering.

Construction has begun Western Sydney Airport and in a few short years, it will bring visitors from around Australia and the world to our city.

Our Home, Liverpool 2027 Community Strategic Plan (CSP) outlines our community's priorities for Liverpool. This Destination Management Plan feeds into the community's aspirations as outlined in the CSP by creating connection between local people and visitors. It will help us generate opportunities for new and existing businesses, feeding into our \$11.4 billion local economy.

In promoting our wonderful city as a tourist destination, we hope to strengthen community pride and raise investor confidence, leading to direct and indirect job creation through the growth of the visitor economy.

Mayor Wendy Waller

CEO's Message



KIERSTEN FISHBURN
CEO

As Liverpool grows and realises its potential as Sydney's third CBD, we are capturing national and international interest.

Work has begun on the much-anticipated Western Sydney Airport, global businesses are lining up to locate themselves in the surrounding Aerotropolis and we look forward to the \$740 million upgrade of Liverpool Hospital.

Last year, we rezoned 25 hectares in the heart of Liverpool, which will encourage new businesses and double the resident population in the CBD, bringing new energy to the heart of our city.

As our city matures, so must the way we present ourselves to the world.

The objective of this Destination Management Plan is to build a thriving visitor economy and increase the economic benefits that flow from tourism to local businesses and communities

Liverpool has a culturally diverse and growing population so it is important to have increased engagement and support from locals to grow Liverpool as a visitor destination

One of the key drivers of visitors to Liverpool is visiting friends and relatives, so it is vital that we build our community's awareness of the attractions they have on their doorstep.

This Destination Management Plan will guide us in redefining our visitor economy, focusing on holiday, leisure, events and festivals, business, education, employment, and medical travel.

Growing the visitor economy is part of Council's broader vision to stimulate the local economy, increasing the appeal and competitiveness of Liverpool as a destination and lifestyle choice.

CEO Kiersten Fishburn



Welcome to

LIVERPOOL

Executive Summary

The Destination Management Plan (DMP) is a five year strategy detailing Council's priorities for the development of the visitor economy in Liverpool. The DMP provides strategic direction and defines Council's role and commitment to meeting the needs of the visitor economy in the City.

Growing Liverpool's visitor economy is part of Council's broader vision to stimulate the local economy through the injection of new dollars, creation of employment opportunities and increased demand for local goods and services. A strong visitor economy will showcase and celebrate the City's assets of the City – its people and lifestyle, rich cultural diversity, heritage, natural assets and events. Marketing and promotion will enhance the City's profile, thereby building and strengthening community pride and raising investor confidence. Western Sydney Airport will provide new opportunities to attract international visitors and grow the local visitor economy

The vision for Liverpool's DMP is; A place locals are proud to call home; celebrating and sharing our diversity, heritage and nature.

The DMP's objective is to build a thriving visitor economy and increase the economic benefits that flow from tourism to local businesses and communities through unique visitor experiences.

The DMP has five strategic directions:

- Promote Liverpool as a core visitor destination through increased engagement and support from locals.
- Support local businesses, groups and organisations to build and develop the visitor economy and their tourism products.
- Celebrate Liverpool's diversity and utilise it to grow and strengthen the visitor market base.
- Attract new businesses, events and investment to engage locals and increase visitation to Liverpool.
- Leverage existing and emerging assets to grow Liverpool's visitor economy.



1. Introduction

The Liverpool Destination Management Plan (DMP) provides the direction and framework for growing Liverpool's visitor economy. Tourism Australia recognises that tourism is more than just the holiday travel sector but incorporates a broader visitor economy, including domestic and international travel for business, study, work and visiting friends and relatives (VFR). The DMP focuses on:

- Distinguishing the importance of community pride to create a successful visitor economy;
- Identifying opportunities to strengthen and grow the City's existing market base and diversify into new markets to increase visitation;
- Identifying opportunities to improve and strengthen the City's product base, harnessing and building on existing assets;
- Identifying the infrastructure, facilities and services needed to support and facilitate the growth of the visitor economy;
- Understanding the future needs of the City as well as the changing needs and expectations of visitors;
- Identifying priorities to ensure the most effective use of Council resources including exploring and establishing partnership opportunities; and
- Recognising the significant impact Western Sydney Airport will have on the local visitor economy.

The main outcomes of the DMP are:

- A growing visitor economy that is economically, socially and environmentally sustainable;
- Increased appeal and competitiveness of Liverpool as a destination and lifestyle choice;
- Increased local knowledge of tourism experiences available in the Liverpool LGA;
- Increased local time and money spent in the area to leverage the VFR market to generate new visitors;
- Increased visitor satisfaction by providing quality experiences that deliver on the City's brand promise and core values, as well as services and facilities that meet visitors' needs and expectations;
- Increased public and private investment in appropriate and sustainable tourism products;
- Direct and indirect job creation through the growth of the visitor economy; and
- Preparing Liverpool to benefit from opportunities presented by Western Sydney Airport.

1.1 Redefining the Visitor Economy

Tourism traditionally has been defined and focused on leisure tourists, meaning, a person who is visiting a place for pleasure and interested in a holiday. Contemporary definitions have moved away from this concept towards a focus on the visitor economy. The visitor economy is defined by people who travel outside of their usual area for holiday, leisure, events and festivals, business, conventions, exhibitions, education, visiting friends and family and employment (Industry NSW, 2012). The term 'visitor economy' incorporates all goods and services consumed by visitors, and not limited to traditional visitor attractions. It takes into account industries which directly serve visitors and industries which are involved indirectly. Industries which directly serve visitors include traditional definitions of tourism such as accommodation suppliers and major attractions. Industries which indirectly serve the visitor economy include retail, hospitality, services such as banks and medical centres. This provides benefits to a broader economy through employment, investment, infrastructure development and export growth (Industry NSW, 2012).



1.2 Why a Destination Management Plan?

The Destination Management Plan is a five year strategy detailing Council's priorities for the development of the visitor economy in Liverpool. The DMP provides strategic direction and defines Council's role and commitment to meeting the needs of the visitor economy in the City.

Growing Liverpool's visitor economy is part of Council's broader vision to stimulate the local economy through the injection of new dollars, creation of employment opportunities and increased demand for local goods and services. A strong visitor economy will showcase and celebrate the City's assets – its people and lifestyle, rich cultural diversity, heritage, natural assets and events. Marketing and promotion will enhance the city's profile, thereby building and strengthening community pride and, raising investor confidence.

1.3 Developing the Destination Management Plan

Findings from the following processes have informed this DMP:

- Review of relevant federal, state and local policies and strategies.
- Analysis of the latest Census and Destination NSW data to identify demographic trends that informed current market trends, potential target markets and demand.
- Analysis and audit of current tourism assets, event facilities and trends on a local, state and national level.
- Consultation with key stakeholders including within Council, and other industries such as arts and culture, sport, history and heritage, hospitality, health, education and Western Sydney International (Nancy-Bird Walton) Airport (WSIA) through community surveys and workshops.

1.4 The Role of Local Government

Local government will work to set long-term objectives for the visitor economy with a view to sharing knowledge and ideas that can strengthen communities, contributing to social wellbeing and sustain economic growth in the area.

Local governments have a particularly important role in facilitating opportunities for their local communities and visitors to participate and benefit from the visitor economy, including:

- The role of an 'enabler' to facilitate and drive the projects and actions associated with the visitor economy;
- The role in connecting the visitor experience and local liveability as a place needs to be a great place to live to become a great place to visit;
- Local government facilitates opportunities for local communities to participate, grow and promote the region; and
- Local businesses, organisations and community members are also major partners in promoting, developing and marketing the local area.

Council's intention with the DMP is to support the development of a thriving visitor economy. This Plan aims to provide a platform to engage the local community in promoting Liverpool as a destination, develop a positive brand image for Liverpool, and create a captivating and attractive destination for both residents and visitors to enjoy.

Limitations

This Plan aims to build a destination where the community and visitors are engaged. It presents the opportunity for Council to be strategic and innovative in developing and managing the visitor economy. Council will play a facilitating role and collaborate with the community, businesses, private and public sector bodies to drive investment in the visitor economy, attract visitors and local participation and create a place for all to enjoy across the LGA.



2. Policy Framework

The DMP is informed by and aligned with international, federal, state and regional policies and Council's Community Strategic Plan (CSP), *Our Home, Liverpool 2027*. All four directions of the DMP are related to this strategy and requires participation from members of the community across all levels. The DMP contributes to the community's vision for the future as identified in the CSP, 'Liverpool, rich in nature, rich in opportunity, creating community; our place to share and grow'. The DMP outlines actions which will contribute to delivering the overall vision for *Our Home, Liverpool 2027*.

The DMP relates to all four directions of the CSP, which are:

Direction 1: Creating Connection

Direction 2: Strengthening and Protecting our Environment

Direction 3: Generating Opportunity

Direction 4: Leading through Collaboration

The DMP focuses on connecting local people and celebrating the diversity, inclusion and heritage of Liverpool, protecting and enhancing the urban and natural environment, attracting businesses for economic growth and employment opportunities, as well as increasing community engagement through events and participation in promotion.

2.1 Links to Other Planning Initiatives

The DMP sits along other documents and initiatives which relate to broader Australian tourism initiatives and *Our Home, Liverpool 2027*. These documents include:

Federal:

- Tourism Australia, *Tourism 2020*, Australian Government Department of Resources, Energy and Tourism

State:

- *Southern Parklands Landscape Framework 2018*, Western Sydney Parklands
- NSW Government Visitor Economy Industry Action Plan 2030
- *Building Western Sydney's Cultural Arts Economy*, Deloitte 2015
- *Western Sydney Visitor Economy Strategy 2017/18 – 2020/21*, NSW Government
- The Western Sydney City Deal
- NSW Government Cultural Infrastructure Action Plan 2018
- *Western Sydney Opportunities for Destination Holiday Parks* Western Sydney Business Chamber and Western Sydney and Caravan & Camping Industry Association NSW
- *Our Greater 2056 A Metropolis of Three Cities – Connecting People*; Greater Sydney Commission

Local:

- *Our Home, Liverpool 2027*, Community Strategic Plan 2017
- Cultural Strategy (2017 – 2021)
- Liverpool Council Cultural Policy 2017
- Liverpool City Activation Strategy 2018 – 2023
- Liverpool Recreation, Open Space and Sports Strategy 2018
- Liverpool Collaboration Area Place Strategy 2018, Greater Sydney Commission
- Liverpool *The Airport City Report 2017*
- *Liverpool: the Gateway to Sydney's Aerotropolis Report 2017*, PWC
- Hotel and Short Term Letting – Demand and Supply Study South West Sydney Report 2018, Colliers International
- Tourism In Liverpool Report 2017, URBIS
- Liverpool Economic Development Strategy 2019 – 2029

2.2 Links to the Community Strategic Plan Challenges

A rapidly growing population and changing landscape presents Liverpool with numerous challenges. This Destination Management Plan, along with other planning documents, identifies opportunities to respond to these challenges.

Community Pride and Heritage

Liverpool has a rich heritage with major cultural and arts focus. There are a number of significant heritage buildings and places which are protected at local and state levels, which contribute to Liverpool's identity. Maintenance of historical buildings often involves significant building works which come at a high cost. A challenge for Council is to balance the need to protect the community identity and heritage with budgeting pressures.

Economic Development

Liverpool continues to experience growth in commercial and industrial development. Its status as a strategic commercial centre of South West Sydney, and its transport links to other areas of Sydney, places Liverpool in a prime position. Council's challenge is to create a city that is attractive, vibrant and engaging to both visitors and locals.

Social Connection

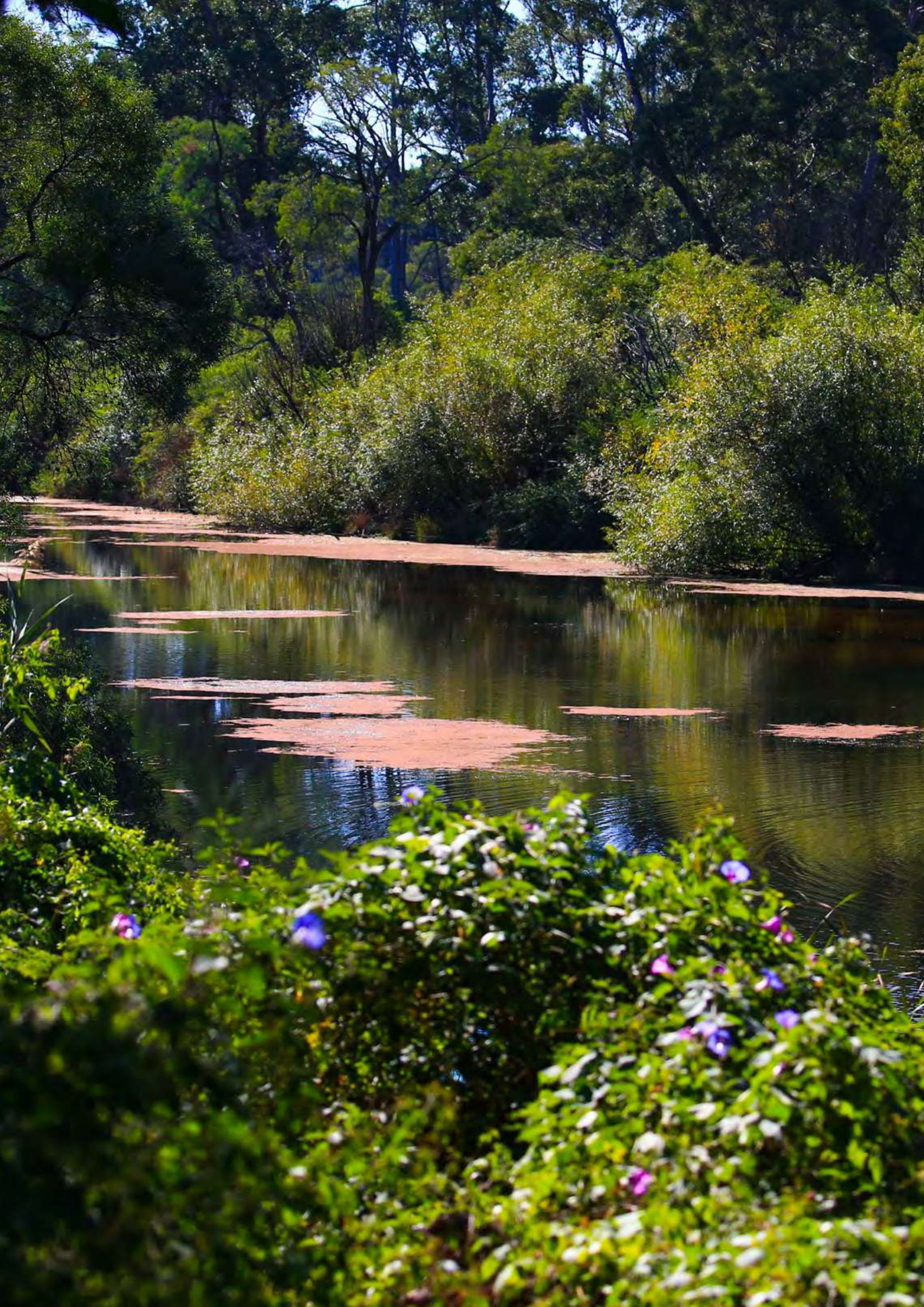
Liverpool is one of the most culturally diverse cities in NSW with almost one in three people born overseas. Liverpool also has a significant Aboriginal community. There is a challenge for Council to ensure services to a broad range of citizens. Finding social connection within a community has become increasingly complex with the numerous demands of everyday life.

Environmental Sustainability

Liverpool has a wide variety of plants, animals and ecosystems, including a significant number of threatened species. Expanding urban development in Liverpool can place pressure on natural environments.

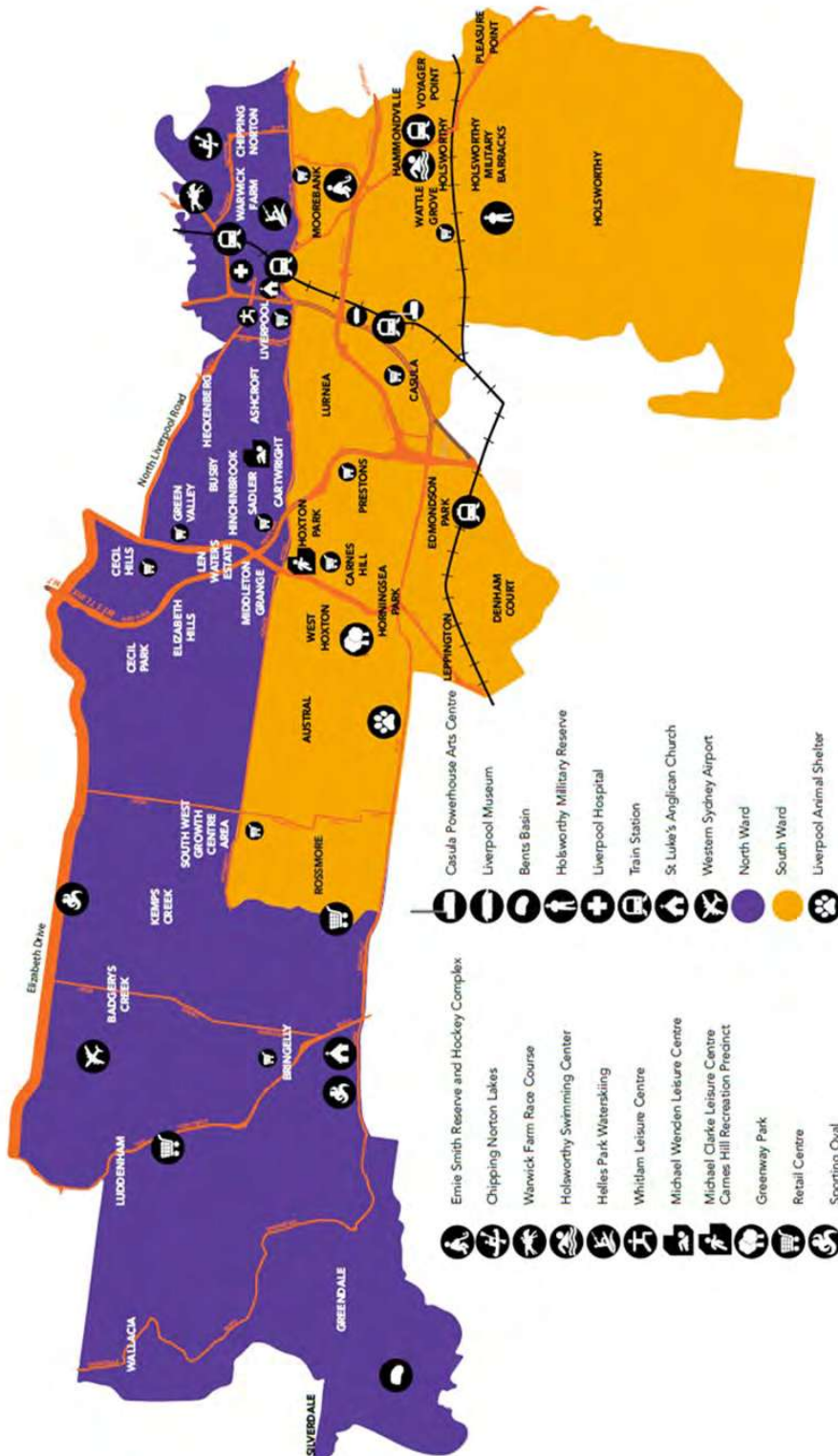
Transport Accessibility

Liverpool's growing population places demand on our existing infrastructure and high traffic volume. Liverpool has good access to Sydney's major motorways.



3. Liverpool Destination Analysis

Local Government Area



3.1 Visitor Landscape

Liverpool LGA is currently in a state of major transformation. Liverpool will be Sydney's third city, home to a new airport, a range of global companies, four universities and a vast network of small to medium businesses. Liverpool is currently in the infancy of tourism evolution, as there is limited knowledge and information on Liverpool as a tourism region. There are several current and future developments which will influence the visitor economy, including:

- Amendment No. 52 of the Liverpool Local Environment Plan is set to transform Liverpool's CBD. This is the rezoning of Liverpool's city centre to allow a modern, vibrant, 18-hour economy to develop. This amendment will invite cafes, bars, restaurants, retail, entertainment and other mixed business uses into the CBD. Liverpool will become a modern city with a heart in its historical roots. Liverpool will continue to see quality development along the river, transforming Liverpool into a river city.
- \$740 million redevelopment of Liverpool Hospital transforming the area into a health and innovation precinct.
- Liverpool CBD is currently home to three universities.
- A strong VFR market, which is likely to continue to grow due to projected population growth.
- Increasing corporate and medical development, and therefore events.
- Strategic location with accessibility to Sydney Airport and the future WSIA, Parramatta, major motorways, as well as being located on the main Sydney to Canberra and Sydney to Melbourne routes.
- Competitive due to its affordability, which allows it to become an attractive base for tour group travellers, and those travelling on the major routes southwest of Sydney.

Current Visitation

Data on current visitation rates to Liverpool varies greatly. In 2017 Council commissioned Urbis to estimate visitation to Liverpool. The data reported is in appendix 1, and summarised below.

- 526,728 domestic day trippers
- 293,275 domestic overnight visitors
- 34,982 international visitors*
- total 854, 985

According to Urbis, Liverpool visitor purpose is dominated by the VFR sector (53% of domestic day visitors and 49% of international visitors). In comparison, South Western Sydney and NSW as a whole is dominated by travel for holiday purposes.

Looking forward, there is significant potential to grow and diversify the market base. Harnessing and celebrating Liverpool's cultural diversity and providing opportunities to bring locals and visitors together will be core to building the City's visitor economy. Expenditure by visitors creates significant economic growth across a range of industry sectors such as retail, accommodation and food services.

*Council resolution indicates a growth of up to 200,000 international visitors staying in Liverpool and surrounding area per year (new data TBC, Council Meeting 6 February 2019).

3.2 Tourism assets

Liverpool has existing tourism products and assets as well as several proposed assets which will assist in building the visitor economy. The rapid growth occurring throughout Liverpool will usher in a new wave of assets and products that will directly and indirectly contribute to Liverpool's visitor economy.

Based on Liverpool's core tourism assets, the LGA's current core products and experiences are:

- Multicultural culinary tourism
- Specialty shopping
- Vibrant arts scene, festivals and events
- Eco-tourism – explore the Georges river and parklands
- Health and innovation precinct; e.g. medical related visitation
- Universities; e.g. growing student population
- History and heritage; e.g. Collingwood House, Heritage Buildings, Liverpool Regional Museum
- Indigenous history and culture
- Sport; e.g. Sydney International Shooting Centre, Netball and Karate at the Whitlam Centre
- International and national tourism destination*



Georges River footbridge concept

* As per Council resolution 6 February 2019



3.3 Liverpool Region Strengths and Assets

Liverpool has several strengths which support the growth of its visitor economy. These strengths include:

- **Accessibility:** Liverpool is one of the most accessible LGAs in Sydney, sitting on the junction of the Hume Highway, M5, M7, Cumberland Highway and Newbridge Road. Liverpool is also serviced by 4 rail lines, and an express bus T-Way. Liverpool has direct access to the Sydney and Parramatta CBDs, Sydney Airport, and is highly accessible to Sydney Olympic Park, Sydney Motor Sports Park, the major sporting and entertainment venues in Western Sydney. WSIA will also be in Liverpool.
- **Affordability:** Liverpool is a cost-competitive destination with the cost of accommodation, venue hire, car parking being lower than the Sydney CBD, Inner City and Parramatta CBD.
- **Walkable city:** Liverpool's CBD is easily walkable due to its flat terrains, grid like design and short distances between core facilities.
- **Economic Base:** Liverpool LGA has a strong and diverse economic base with the main sectors being health and social assistance, education, retail trade, construction and manufacturing and a burgeoning innovation sector.
- **Availability of venues:** Liverpool LGA has a range of conference, function and entertainment venues. The Whitlam Leisure Centre is one of two venues in the Sydney region with a design capacity of around 3,000 – 3,500 seated, while the Liverpool Catholic Club has one of the largest purpose-built, contemporary conference and function centres with onsite accommodation outside of the Sydney CBD. William Inglis Hotel has addressed the gap in the higher end of the market.
- **Physical environment and natural resources:** Liverpool is located on the Georges River, with the LGA having extensive tracts of parklands and reserves, including the Western Sydney Parklands, Chipping Norton Lakes, Bents Basin, Edmondson Regional Park, Leacock Regional Park and the Georges River Corridor. These parklands and reserves give way to eco-tourism, nature walks and recreational activities.
- **Liverpool and surrounds have significant supply of hotels and short term accommodation servicing the current demand of 200,000 international and national visitors (TBC). More accommodation will be required to meet the demand towards the opening of the WSIA.***
- **Liverpool Hospital has received major funding which will facilitate an increase in the visitor economy. There is also major development occurring to Liverpool's Innovation Precinct as a whole, which will increase medical and corporate visitation to Liverpool and therefore opportunities to grow the visitor economy through provision of ancillary offerings.**
- **Cultural diversity:** Liverpool is one of the most ethnically diverse communities in Australia with residents from 150 different countries.
- **Heritage and culture:** Liverpool is the fourth oldest city in Australia. It has a rich local history, as well as a developing arts and entertainment scene.
- **Casula Powerhouse Arts Centre is one of the leading arts centres in the region, and attracts over 50,000 visitors annually.**

* As indicated by Council resolution 6 February 2019

3.4 Liverpool Region Weaknesses

Liverpool has a series of weaknesses which need to be acknowledged and addressed in order to grow the visitor economy. These weaknesses include:

- Council commenced having a more active role in Tourism in 2017 after more than 20 years of limited involvement.
- Liverpool will need to build a tourism brand and profile to continue to develop the infrastructure, facilities, and services for a strong visitor economy. Resources are needed to encourage and support the sector and facilitate growth.
- There is a limited level of awareness amongst the local and regional community and the tourism trade about the assets, attractions and activities available in Liverpool.
- Tourism can assist in changing the existing perception of Liverpool. Liverpool currently has a negative perception such as being down market, having limited experiences, social problems and safety issues. Perception is changing and Liverpool is increasingly featured in the media for its growth potential.
- Council needs to overcome barriers with local businesses to recognise that they are in the tourism sector and what Liverpool's offerings are. Until this changes, businesses may be difficult to engage in tourism promotions.
- Businesses currently work individually rather than as a collective, this provides the opportunity and need to develop a network for businesses. It is also important that neighbouring LGAs work together as a region.
- Tourism Australia highlights that only one third of Australian tourism operators have online booking and payment facilities, whilst 80% of Australians are online and utilise it as a core travel agent. Liverpool currently has limited online presence in the tourism sector.
- Within the Western Sydney region, Parramatta, Blacktown, Penrith and Macarthur have well established visitor economies. Penrith, Camden, Campbelltown, Blacktown and Parramatta already have in place the information and promotional materials, and the infrastructure and resources needed to attract and service the thousands of visitors that will be arriving and departing via WSIA.
- There is aging infrastructure and poor presentation in some areas.

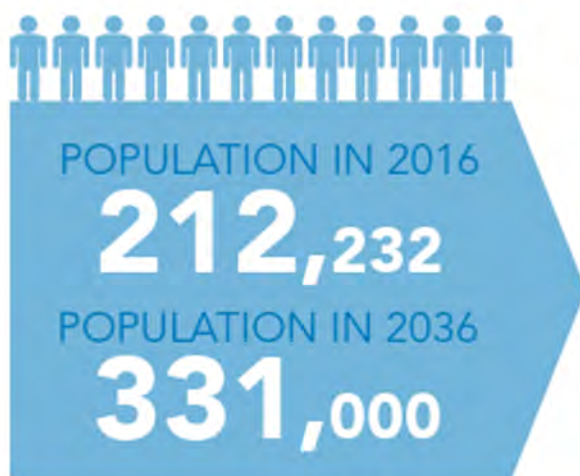
3.5 Future Liverpool Region Opportunities

Liverpool has the following opportunities which will facilitate the growth of the visitor sector in the future:

- Liverpool's rich ethnic diversity is reflected in the City's festivals and events, restaurants and cafes, shops and places of worship. This diversity is also a significant driver of visitation, with thousands of international visitors coming into the LGA each year as visiting friends and relatives.
- Increasing opportunity to host business events due to a variety of venues and Liverpool's increasing significance as a central Sydney location for business.
- Ability to attract medical tourism and events due to the investment and upgrade to the Liverpool Innovation Precinct.
- Strong assets to develop core visitor trails such as culinary, specialty retail, sport and heritage tourism.
- Proximity of the Liverpool CBD to the WSIA.
- Increased mixed-use development facilitated by the LEP Amendment 52.
- Establishment of a thriving 18-hour economy in the city centre.

3.6 Demographics

Liverpool is home to one of the fastest growing populations in Australia, with population growth expected to hit 331,000 by 2036. One of Liverpool's most unique characteristics is the diversity in the community. This diversity must be taken into consideration when developing a visitor economy. Liverpool is home to migrants from over 150 countries with a variety of socio-economic backgrounds. It is important to ensure that the visitor economy and tourism experiences are accessible and affordable to families, younger children, those with lower incomes, whilst providing a social and welcoming environment, and a point of difference to other visitor experiences across the region.



5
TOP LANGUAGES
SPOKEN
ENGLISH,
ARABIC,
VIETNAMESE,
HINDI,
ITALIAN



52%
SPEAK A LANGUAGE
OTHER THAN
ENGLISH AT HOME



630,000
LIVERPOOL
LIBRARY
AND MUSEUM
VISITORS

90,000
VISITS TO CASULA
POWERHOUSE
ARTS CENTRE



4. Destination Vision and Directions

Vision

A place locals are proud to call home; celebrating and sharing our diversity, heritage and nature.

Objective

To build a thriving visitor economy and increase the economic benefits that flow from tourism to local businesses and communities through unique visitor experiences.

Strategic Directions

Promote

Promote Liverpool as a core visitor destination through increased engagement and support from locals.

Support

Support local businesses, groups and organisations to build and develop the visitor economy and their tourism products.

Celebrate

Celebrate Liverpool's diversity and utilise it to grow and strengthen the visitor market base.

Attract

Attract new businesses, events and investment to engage locals and increase visitation to Liverpool.

Leverage

Leverage existing and emerging assets to grow Liverpool's visitor economy.

4.1 Promote

Promote Liverpool as a core visitor destination with increased engagement and support from locals.

Liverpool is home to a diverse group of people, features, cultures, events and history. There are unique opportunities to promote Liverpool to its local community and to a broader audience. Local people have a significant role in presenting a positive image and publicity for the City.

For a visitor destination to be successful, it needs to firstly be attractive and engaging to the local community. The DMP aims to increase the participation of the local community in leisure, play and events in Liverpool. Council will work on the development of a marketing campaign to increase awareness of the experiences available to its local communities. This campaign will then be utilised to translate to a broader audience. Through this campaign, Council will engage with the VFR market (which is Liverpool's core visitor market) to increase visitation expenditure and participation. This Plan presents Council's commitment to creating connection and increasing community pride in Liverpool.

Key outcomes:

- Increased local appreciation amongst residents for the place in which they live, work and play, leading to increased engagement and participation with local businesses and events.
- Development of a new tourism brand and identity for the Liverpool LGA.
- Increased awareness of Liverpool's visitor offerings and experiences.



4.2 Support

Support local businesses, groups and organisations to build and develop the visitor economy and their tourism products.

Local businesses, groups and organisations are the fundamental core to a successful visitor economy. Participation in the visitor economy provides opportunities for social engagement, economic stimulation and contributes to the wellbeing of the City. Council will work with local businesses through consultation and workshops to provide support to grow their visitor economy offerings and experiences. This DMP recognises the challenges present due to the low level of awareness among local businesses and organisations of their role and significance in the visitor economy. There is also limited online presence for tourism assets and experiences in the region. Council will address existing barriers to growing the visitor economy through addressing skills shortages, capacity building, attracting new businesses and attractions, and providing ongoing support and assistance to existing businesses.

Key outcomes:

- Increased web presence of local offerings to support the growth of the visitor economy.
- A developing visitor economy supported by local businesses, organisations and groups.
- Establish core partnerships and networks which will contribute to a sustainable visitor economy.



4.3 Celebrate

Celebrate Liverpool's diversity and utilise it to grow and strengthen the visitor market base.

Liverpool is one of the most diverse LGAs in Australia, which affords it with unique experiences to enhance the visitor economy. Liverpool provides visitors with opportunities to experience different cultures, cuisines, traditions and fashion from around the world without leaving the LGA. Council recognises that these experiences need assets to be at the forefront of Liverpool's visitor identity. Council will work with the local community to enhance the visitor economy through facilitating participation and establishing Liverpool as a cultural hub for South Western Sydney. Council acknowledges Liverpool's rich local history and environmental landscape, which are key attractions and assets to enhancing the visitor economy.

The ambition to celebrate Liverpool's diversity will be prioritised throughout the DMP to set foundations for the preservation of its heritage and identity. Celebrating Liverpool's diversity will also ensure a balance between 'place-making' and 'place-keeping'. 'Place-making' is defined as the creation of high quality spaces that people want to visit, experience and enjoy. 'Place-keeping' is the long-term maintenance and management of such spaces to ensure that the social, environmental and economic quality and benefits can be enjoyed by future generations.

Key outcomes:

- A variety of visitor guides and assets which are accessible to Liverpool's diverse communities and visitors.
- Liverpool recognised as the multicultural hub of Sydney.
- Increased engagement with heritage and historical sites in the LGA.



4.4 Attract

Attract new businesses, events and investment to engage locals and increase visitation to Liverpool.

Council will actively seek out new opportunities for attracting experiences to create engaging visitor assets. Liverpool is currently undergoing a period of transformation and rejuvenation, and Council is leading the change with a number of infrastructure and environmental projects to be delivered in the following years. This includes Liverpool now being home to multiple universities, the upcoming Civic Place and a rejuvenated city centre. Council will develop frameworks and initiatives to encourage new businesses, organisations, experiences and development to attract visitors to the area. Council will advocate for innovative engagement outcomes from the local community and businesses to create a diverse and inviting region.

Council is committed to attracting new opportunities to support different visitor economy segments. This includes recognising the value in the VFR market, and medical and business tourism.

Key outcomes:

- Support to the local sports industry to broaden the visitor experience of participants.
- Collaboration with the education sector to create an attractive destination for domestic and international students to experience and engage with Liverpool.
- Increase number of leads for new events (business, education, sport and recreational) to the LGA.
- Increased number of leads for investment in the local visitor economy.



4.5 Leverage

Leverage existing and emerging assets to grow Liverpool's visitor economy.

Liverpool is rapidly becoming the third CBD of Sydney. Home of the future WSIA and the largest hospital complex in the Southern Hemisphere, the Liverpool CBD and LGA is rapidly transforming to become one of Sydney's key hubs. Liverpool Hospital is about to undergo a \$740 million revamp which is the anchor of the Liverpool Innovation Precinct. Three major universities and TAFE also have a growing presence in the Liverpool CBD.

These changes provide the opportunity for Council to leverage existing and emerging assets to grow the local visitor economy. Council is committed to leveraging the opportunities afforded by these assets to ensure that Liverpool is ready for the growth of the visitor economy, which will be generated as a result of being home of Australia's new international airport.

Key outcomes:

- Support the Western Sydney Airport development and related visitor growth.
- Increased spending as a result of visiting friends and relatives due to the local population and immigration growth.
- Growth of ancillary activities due to increased visitation to the Liverpool Innovation Precinct.



LIVERPOOL
HOSPITAL

→
EMERGENCY
MAYORBRIDGE

←
PARKING
CANCER
FOOD COURT

EMERGENCY

5. Monitoring and Reporting

The DMP will be the responsibility of the City Economy Unit.

The actions of this DMP will be monitored by key internal stakeholders across Council directorates. The outcomes from the DMP will be reported to the Tourism and CBD Committee on a bi-monthly basis. This committee includes external stakeholders from community groups, NGOs and businesses which will assist in exploring further opportunities to build the visitor economy. The benefits sustained from the DMP will be measured.

Evaluation and Review

This DMP will be reviewed every two years. The review should include the following:

1. Council's ongoing commitment to the purpose and objectives of the DMP;
2. Mechanisms to collect feedback on Council's activities in growing the visitor economy;
3. Whether the manner in which Council manages this Plan and related activities is professional, transparent and accountable;
4. Whether conflicts of interest are identified and activities terminated should a conflict of interest arise that cannot be resolved; and
5. Determine next steps through the development of an Action Plan for the following two years.



6. Action Plan

Action Plan										
1. Develop a visitor brand identity and marketing campaign plan.										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
1.1	Develop a brand identity and marketing plan which is consistent across different components of the visitor economy.	L.2	Promote	Marketing plan developed Campaign delivered Post-campaign report	✓	✓	✓	✓	✓	Communications City Economy
1.2	Develop and deliver a <i>Local Love</i> campaign.	L.2	Promote	Local campaign developed Assets and collateral distributed Report and evaluation of campaign		✓	✓			City Economy Communications
1.3	Create an annual Visitor Guide and promotional collateral which is available online and in print. Guide should advise what Liverpool has to offer and encourage local businesses to utilise it to increase their own marketing and development.	C.1	Promote Support	Development of Visitor Guide Total businesses participating in Visitor Guide Distribution channels achieved Engagement measured		✓	✓	✓	✓	City Economy Casula Powerhouse Arts Centre Events Libraries and Museums Communications City Design City Community and Culture

6. Action Plan

1.4	Communicate with neighbouring visitor information centres about featuring Liverpool's Visitor Guide.	L.1	Promote Leverage	Number of placement agreements achieved		✓	✓	✓	✓	City Economy
1.5	Enhance the existing What's On page on the Council website to allow the incorporation of a tourism webpage.	L.1	Promote	Tourism incorporated into What's On		✓				City Economy Communications
1.6	Investigate opportunities for Liverpool to feature in third party marketing publications.	C.1	Promote	Number of third party publications featured in i.e. Time Out, Connect China		✓	✓	✓	✓	City Economy Communications
1.7	Produce a city wide tourism visitor map which is available digitally and in print.	C.3	Promote	Consult local stakeholders and accommodation to produce the map Map complete Map distributed		✓			✓	City Economy Communications
1.8	Develop a social media campaign strategy to market Liverpool as a tourism precinct through organic content that creates a positive image.	L.2	Promote	Strategy completed Social media activities delivered		✓	✓	✓	✓	City Economy Communications
1.9	Evaluate Liverpool's online presence and develop a plan to improve digital profile.	C.1	Promote	Online presence audit complete Digital presence and search engine optimisation plan produced and implemented		✓	✓	✓	✓	City Economy Communications

6. Action Plan

1.10	Engage online travel agents to promote Liverpool domestically and internationally.	C.1	Promote	Number of leads developed				✓	✓	City Economy
1.11	Review Liverpool's presence on third party tourism and travel websites.	G.3	Promote	Audit of Liverpool's representation on third party websites		✓				City Economy
1.12	Audit the accessibility of visitor information for Liverpool and develop easy to access information as recommended by the NSW Government.	C.3	Support	Audit complete Information access plan implemented		✓	✓			City Economy
1.13	Encourage operators to actively promote Liverpool's attractions, events and activities.	G.2	Support Leverage	Number of local providers promoting events on and offline		✓	✓	✓	✓	City Economy
1.14	Develop a visiting friends and relatives targeted marketing campaign with visitor guides available in multiple languages.	C.1	Celebrate Promote	Strategy complete Guides delivered			✓	✓	✓	City Economy Communications
1.15	Develop a campaign to promote parks around Liverpool.	C.4	Celebrate Promote	Campaign plan created Campaign delivered				✓	✓	City Economy Communications

6. Action Plan

2. Position Liverpool as a multicultural hub

Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
2.1	Integrate Liverpool's cultural diversity into the <i>Local Love</i> campaign.	C.1	Celebrate	Campaign delivered in multiple languages		✓	✓			Communications
2.2	Promote and celebrate Liverpool's unique speciality and cultural stores, for example, become the 'Sari Centre' of Sydney, increase recognition of an Iraqi Gold Souk and support the proposed indigenous cultural centre.	G.2	Celebrate	Campaign plan developed and implemented		✓	✓	✓	✓	City Economy Community and Culture
2.3	Develop a marketing campaign which celebrates the ability to 'travel around the world' without leaving Liverpool.	G.2	Celebrate	Marketing campaign developed and delivered			✓	✓	✓	City Economy Communications
2.4	Explore partnership opportunities with local and neighbouring cultural tourism enterprises.	G.2	Support Leverage	Leads generated Partnerships created		✓	✓	✓	✓	City Economy Community and Culture
2.5	Explore partnerships with neighbouring LGAs to establish South Western Sydney as a cultural centre.	G.2	Celebrate Leverage	Partnerships explored			✓	✓	✓	City Economy

6. Action Plan

3. Investigate the sustainability of a Visitor Information Centre										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
3.1	Conduct a feasibility study on the sustainability and benefits of a Visitor Information Centre (VIC) in Liverpool.	C.4	Promote	Feasibility report complete			✓			City Economy (Tourism)
4. Develop a way finding strategy which will assist visitors in the CBD and surrounds										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
4.1	Audit the signposting and way-finding around Liverpool from a tourism perspective.	S.4	Promote	Audit complete Recommendations presented to Council		✓			✓	City Design
4.2	Create a new strategy for sign posting and way finding around Liverpool. This includes the gateways into Liverpool, such as motorways and public transport.	S.4	Promote	Audit Liverpool's current gateways Strategy complete		✓	✓			City Design and Public Domain
5. Work with surrounding LGAs to create a visitor destination network for the region										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
5.1	Explore opportunities to collaborate in a South Western Sydney marketing strategy rather than refining to an LGA border.	L.1	Promote Leverage	Number of partnerships explored		✓	✓	✓	✓	City Economy Communications

6. Action Plan

5.2	Capitalise on cooperative marketing opportunities with businesses, other regions, organisations and sectors.	L.1	Promote Leverage	Cooperative marketing opportunities achieved			✓	✓		City Economy
5.3	Encourage core visitor economy business operators to work together to create a tourism network in Liverpool rather than functioning as silos.	G.2	Support Leverage	Network created between examples such as The William Ingis Hotel, Casula Powerhouse Arts Centre and Georges Cove Marina.				✓	✓	City Economy
6. Assist and support local businesses, groups and organisations in the development of the visitor economy whilst attracting new businesses for future growth										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
6.1	Develop a framework for Council to support businesses so they are prepared to support the growth of the visitor economy.	G.2	Support	Framework development		✓	✓			City Economy
6.2	Conduct workshops with local businesses on the impacts and benefits of a visitor economy.	G.2	Support	Workshop implemented Workshop attendance		✓			✓	City Economy
6.3	Develop a tourism e-kit based on Tourism Australia's kit to help local businesses attract visitors through information and communication technology.	G.2	Support	e-kit developed and distributed		✓			✓	City Economy Communications

6. Action Plan

6.4	Consult with the tourism sector in the region to receive feedback and understanding to assist growth.	L.2	Support	Number of opportunities for consultation highlighted		✓				City Economy
6.5	Investigate if there is a skills shortage in the area to keep up with the increased demand from a visitor economy.	G.2	Support	Study complete through consultation Shortages investigated			✓		✓	City Economy

7. Improve the visitor experience journey through a variety of trails

Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
7.1	Develop a series of experience trails which can be utilised to promote the region such, as cultural, historical, Indigenous, food and wine, biking and cycling.	C.1	Promote	Trails developed Engagement measured		✓	✓	✓		City Economy Transport Planner

8. Leverage the Western Sydney International (Nancy-Bird Walton) Airport development and related visitor growth to further expand and develop the local visitor economy

Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
8.1	Identify what we can do immediately to start to position WSIA for tourism growth.	G.2	Leverage	Relevant studies completed		✓	✓			WSIA Aerotropolis and City Planning City Economy

6. Action Plan

8.2	Develop an aerotropolis tourism reference group particularly focussed on tourism related development around the WSIA.	G.1	Leverage	Group created		✓					City Economy (lead) Destination New South Wales Department of Industry City Deal South Western Sydney Tourism Taskforce
-----	---	-----	----------	---------------	--	---	--	--	--	--	---

9. Investigate a potential site for a recreational vehicle holiday park within Liverpool LGA

Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
9.1	Research the benefits of a Holiday Park to the LGA.	G.2	Support	Study complete	✓					City Economy
9.2	Identify a potential site for a holiday park within the LGA.	G.2	Support	Site identified Recommendations presented to Council		✓	✓			Strategic Planning

10. Grow Liverpool's presence on guided holidays itineraries

Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
10.1	Consult guided holiday and tour operators on the requirements to be a destination included in their itineraries.	G.3	Leverage Attract	Consultation conducted Learnings implemented	✓	✓	✓			City Economy

6. Action Plan

10.2	Study potential interest-based tourism in Liverpool to foster the development of like-minded touring groups.	C.3	Celebrate Attract	Number of potential groups engaged				✓	✓	City Economy
11. Grow the local recreation tourism market										
Actions	CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible	
				2018/19	2019/20	2020/21	2021/22	2022/23		
11.1	Audit existing events and sports facilities located in Liverpool and their quality.	G.2	Attract	Audit Complete		✓			✓	Recreation
11.2	Determine the total visitation rates and revenue generated as a result of sporting events.	G.2	Attract	Rates determined and plans to increase delivered		✓	✓	✓	✓	Community Development City Economy
11.3	Generate a large group guide with local businesses for those visiting for sporting or group events.	G.2	Attract Support	Guide created and delivered		✓	✓	✓	✓	City Economy Recreation
11.4	Collaborate with key stakeholders to develop the Georges River Corridor into a major recreational node for South West Sydney, providing a range of water and land based activities.	G.2	Attract Leverage	Plan developed Number of events attracted				✓	✓	City Economy Community Development and Planning
11.5	Support local sporting facilities to grow as premier venues.	G.2.	Support Leverage	Audit on quality Number of sporting events held			✓	✓		Community and Culture

6. Action Plan

12. Establish Liverpool as a culinary tourism destination										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
12.1	Encourage local restaurants and cafes to have a 'scores on doors' approach to showcase compliance with food safety to create a culinary tourism destination.	G.2	Support	Number of eateries with scores on doors		✓	✓			City Economy
12.2	Attract business to the CBD and surrounds to create eat streets and urban villages.	G.2	Attract	Number of leads generated		✓	✓	✓	✓	City Economy
12.3	Continue to enhance and promote culinary activity nodes in the city through taste tours.	G.2	Promote	Promotions developed Number of taste tours explored and developed	✓	✓	✓	✓	✓	City Economy
12.4	Coordinate the development of a harvest trail with local farms.	G.2	Support Promote	Harvest trail developed					✓	City Economy
13. Grow event-based visitation										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
13.1	Continue to support Casula Powerhouse to position itself as the leading Arts Centre in South Western Sydney.	G.2	Support celebrate	Increased visitation	✓	✓	✓	✓	✓	Casula Powerhouse Arts Centre

6. Action Plan

13.2	Audit the existing business and events space and analyse whether they are meeting demand.	G.1	Attract	Audit complete Repeat report in 4 years	✓				✓	City Economy
13.3	Investigate and study the requirements of a city to host major events through consultation with events organisations and comparative studies with other LGAs.	G.2.	Attract Leverage	Study complete		✓				City Economy
13.4	Explore opportunities to secure and attract iconic events which will attract people from around New South Wales including business, education, medical tourism, community and niche sectors in Liverpool.	G.3	Attract	Leads generated		✓	✓	✓	✓	City Economy Casula Powerhouse Arts Centre
13.5	Develop a business and events guide to encourage the meeting, incentive, conference and events sector to utilise Liverpool as a host due to the variety of facilities available.	G.2	Attract Support	Guide delivered and distributed		✓			✓	City Economy Communications
13.6	Attract investment in venue infrastructure.	G.3	Attract	Number of investment leads attracted			✓	✓	✓	City Economy

6. Action Plan

14. Establish Liverpool as a leading destination for medical tourism and events										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
14.1	Explore opportunities for Liverpool to become a leading destination for medical events in Australia.	G.2	Attract Leverage	Opportunities identified and leads generated		✓	✓	✓	✓	City Economy
14.2	Collaborate with key stakeholders to investigate the future opportunities provided by the upgrade to Liverpool's Health and Innovation Precinct to stimulate the visitor economy.	G.2	Attract Leverage	Opportunities identified and addressed			✓	✓	✓	City Economy
14.3	Investigate existing visitation rates and yield value from the medical sector to Liverpool and activities participated in outside of work.	G.2	Attract	Study complete		✓	✓			City Economy
14.4	Investigate opportunities for Liverpool to participate in educational tours with the health and education sectors.	G.3	Attract Leverage	Number of opportunities obtained			✓	✓	✓	City Economy

6. Action Plan

15. Capitalise on Liverpool's rich local heritage										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
15.1	Develop the Heritage Activation Strategy.	C.1	Celebrate	Strategy developed Actions from strategy delivered			✓	✓	✓	City Economy City Design and Public Domain
15.3	Collaborate with the Museum of Army Engineering to promote the museum as a quality, iconic attraction for Liverpool and a focal point for military history within the LGA.	C.1	Celebrate Support Leverage	Recommendations presented		✓	✓			City Economy Holsworthy Barracks
15.4	Collaborate with Landcom to develop the Bardia Barracks-Edmondson Park precinct as a visitor activity node with a strong focus on military history.	C.1	Celebrate Leverage	Recommendations presented		✓	✓			City Economy Landcom
15.5	Enhance and promote the experience of Liverpool Regional Museum.	C.1	Celebrate	Recommendations presented		✓	✓	✓	✓	City Design Library and Museums
15.6	Completion of the actions within the Reconciliation Action Plan which relate to tourism.	C.1	Celebrate	Actions completed	✓	✓	✓	✓	✓	City Community and Culture

6. Action Plan

16. Build a strong education based visitor economy										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
16.1	Engage with local education facilities to attract the families of international students to explore and visit the area they are studying in.	L.2	Attract Leverage	VFR international student plan created Number of visitors attracted		✓	✓	✓	✓	City Economy Western Sydney University University of Wollongong TAFE NSW
16.2	Engage with local businesses to develop a student discounts campaign.	G.2	Attract Support	Number of businesses participating	✓	✓	✓	✓	✓	City Economy
17. Facilitate increased visitor economy investment										
Actions CSP		Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
17.1	Encourage domestic and international businesses to invest within the LGA to create core visitor economy recreational attractions to increase visitation.	G.3	Attract Leverage	Plan developed Number of leads attracted				✓	✓	City Economy
17.2	Create a Liverpool Destination Product Development Opportunities Plan.	G.3	Support Attract	Plan created		✓				City Economy

6. Action Plan

18. Provide ongoing support to the accommodation sector in Liverpool										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
18.1	Encourage accommodation providers to enhance their online presence profile.	G.2	Support	Audit online presence of local accommodation	✓	✓	✓			City Economy
18.2	Encourage accommodation providers to promote Liverpool as a destination both online and in-house.	G.2	Support Promote	Number of local accommodations promoting Liverpool as a destination to guests		✓	✓	✓	✓	City Economy
19. Position Liverpool as a shopping destination										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
19.1	Increase Liverpool's recognition as a destination for diverse shopping including malls, boutiques, speciality stores, factory outlets and homemaker centres.	G.3	Support Promote	Campaign developed and delivered		✓				City Economy Shopping outlets in Liverpool including Westfield and Fashion Spree
20. Determine baseline visitation figures										
Actions		CSP Key	DMP Direction	Measures	Timeframe for completion or implementation					Responsible
					2018/19	2019/20	2020/21	2021/22	2022/23	
20.1	Conduct a research study to determine baseline visitation numbers and data to Liverpool.	G.2	Promote	Study complete and repeated	✓		✓		✓	City Economy

CASULA
POWERHOUSE

NEW
THEATRE
SPECIAL EVENTS
COMEDY
FILM
GUIDED TOURS
COURSES

ART
EXHIBITIONS
TALKS
WORKSHOPS
EDUCATION PROGRAMS FOR
PRIMARY & SECONDARY
SCHOOLS

CASULA
POWERHOUSE
CHANGE
YOUR MIND

CASULA
POWERHOUSE



7. References

- Australian Regional Tourism Network, *The Guide to Best Practice Destination Management*
- A. Stafford & Associates, *Western Sydney Opportunities for Destination Holiday Park*, 2018
- Cooper, C & Hall, C. 2008, 'Contemporary tourism – an international approach', *Elsevier LTD*
- Destination NSW, *Visitation to Liverpool LGA*, 2018
- Destination NSW, *Western Sydney Visitor Economy Strategy 2017/18 – 2020/21*
- Greater Sydney Commission, *Liverpool Collaboration Area Place Strategy*, 2018
- Liverpool City Council, *Cultural Strategy*, 2017 – 2021
- Liverpool City Council, *Liverpool City Draft Destination Plan 2016 – 2023*.
- Liverpool City Council, *Our Home Liverpool 2027, Community Strategic Plan*, 2017
- NSW Government, *Cultural Infrastructure in NSW*, 2018
- NSW Government, *Southern Parklands Landscape Framework*, SISC Meeting, 2018
- NSW Government, *Visitor Economy Industry Action Plan 2030*, 2018
- Tourism Australia, *Tourism 2020*, December 2011
- Urbis, *Tourism in Liverpool – A Snapshot 2017*

8. Appendix 1 - Urbis Report 2017

TOURISM IN LIVERPOOL – A SNAPSHOT

The following is an overview of the tourism sector in the Liverpool Local Government Area (LGA), and its significance within the regional economy. The analysis has been conducted using data from Tourism Research Australia (TRA), Destination NSW and the REMPLAN Input/Output model.

There were almost 855,000 visitors to Liverpool in 2016, accounting for 20% of visitors to South West Sydney, and almost 3% of visitors to Greater Sydney. Notably, Liverpool accounts for over a quarter of domestic overnight and international visitors to South West Sydney (Table 1).

Table 1 – Visitors to Liverpool and South West Sydney, 2016

	Domestic day visitors	Domestic overnight visitors	International	Total
Liverpool	526,728	293,274	34,982	854,985
South West Sydney (incl. Liverpool)	3,089,119	1,102,432	134,957	4,326,508
NSW	57,570,000	29,188,000	3,872,000	90,630,000

Source: TRA, Urbis calculations

The major source of tourism within Liverpool is from people visiting friends and relatives (VFR), driven chiefly by the large and growing Culturally and Linguistically Diverse (CALD) population in the region.

In 2016, the VFR tourism segment accounted for 53% and 49% of domestic day visitors and international visitors, respectively, in Liverpool (Figure 1 and Figure 2).¹ In contrast, across South West Sydney and NSW as a whole, domestic day and international visitors are more likely to be visiting for holiday purposes.

Figure 1 – Purpose of visit, domestic day visitors, 2016

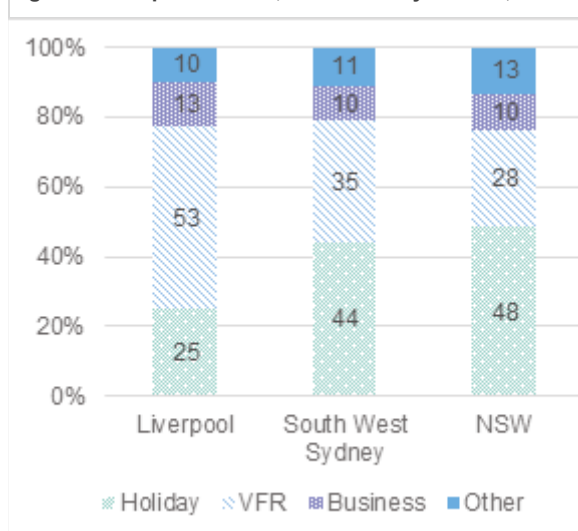
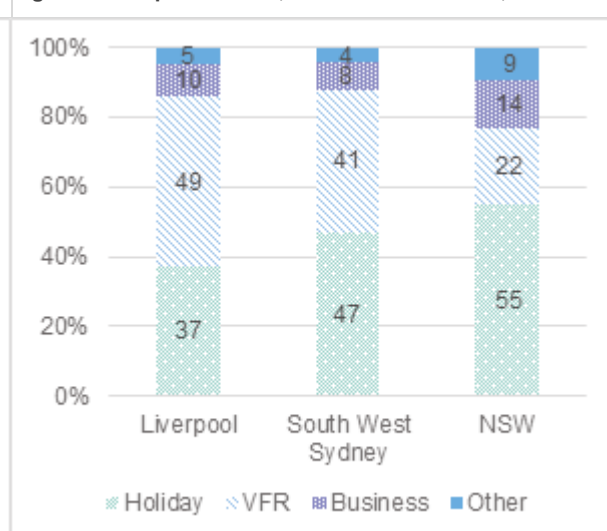


Figure 2 – Purpose of visit, international visitors, 2016

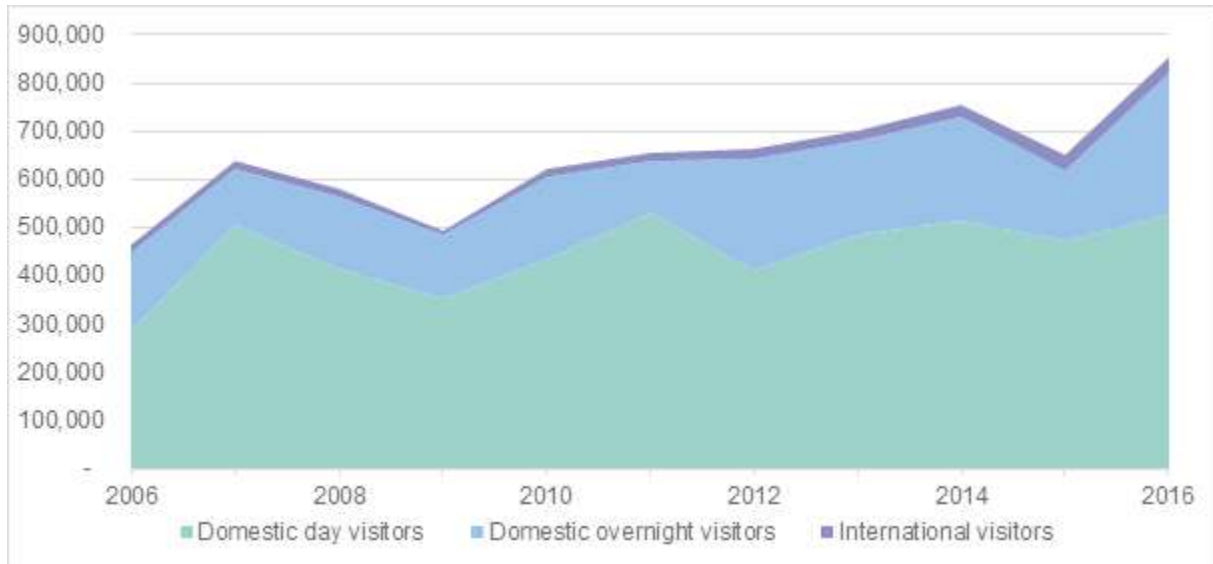


Source: TRA, Destination NSW, Urbis calculations

¹ Comparative data on the purpose of visit by domestic overnight visitors is not available for Liverpool.

Liverpool has recorded an 85% increase in total visitations over the period 2006 to 2016 (Figure 3). Growth in visitors to Liverpool has far outpaced the growth recorded across South West Sydney (62%) and NSW as a whole (26%), over the same period.²

Figure 3 – Annual visitors to Liverpool by category



Source: TRA, Urbis calculations

Growth in international visitors was particularly strong for both Liverpool (144%) and South West Sydney (134%) between 2006 and 2016, likely reflecting the stronger-than-average growth in the population of the region, which has remained culturally diverse. Average annual population growth in Liverpool was 2.6% between 2011 and 2016, and 2.3% in South West Sydney. In contrast, the number of international visitors to NSW grew by 40% over the same period, where average annual population growth was 1.6%.³

While there is no breakdown of tourists by country-of-origin, we would expect these to be linked to the cultural breakdown of the regional population. The largest migration population groups in Liverpool are: Iraq, Fiji, Vietnam, India, Lebanon and the Philippines.

The average length of stay and spend by visitors to the Western Sydney Region is shown in Table 2.⁴

Table 2 – Average visitor stay and spend, Western Sydney, 2015-16

	Domestic Day	Domestic Overnight	International
Average Stay (nights)	-	2.6	33.3
Average Spend per night (\$)	-	\$283	\$112
Average Spend per trip (\$)	\$104	\$738	\$3,743

² Tourism Research Australia, 2016, *Annual visitor numbers by destination state/region/SA2*

³ NSW Department of Planning and Environment, 2016, *New South Wales State and Local Government Area Population Projections*

⁴ TRA and Destination NSW data is not available for the Liverpool LGA or South West Region. Length of stay and spend per visitor in Western Sydney is considered to be representative of the Liverpool LGA.



Source: Destination NSW

Of note, the average length of stay by international visitors to Western Sydney is significantly greater than the NSW average (22.4 nights).⁵ As reported above, this is likely to be driven by a greater proportion of VFR tourism. The spend per night by international visitors to Western Sydney is on par with the NSW average (\$109 per night).

In contrast, domestic overnight visitors to Western Sydney typically visit for a shorter period than the NSW average (3.3 nights), but spend considerably more per night than the NSW average (\$175 per night).⁶ The average spend by domestic day visitors is the same across Western Sydney and NSW.

Tourism plays a relatively small, but increasingly important, role in the Liverpool economy. In 2015-16, the tourism sector contributed \$161 million value-added (1.7%) to Liverpool's Gross Regional Product (GRP) and 1,350 (2.9%) jobs (full-time equivalents). In comparison, the tourism sector contributed \$18.2 billion (3.4%) in value-added to the NSW economy and accounted for almost 150,000 (5.6%) jobs (FTEs) of state-wide employment.

Key sectors in Liverpool supported by tourism include: retail trade; accommodation and food services; transport, postal and warehousing; education and training; and manufacturing.

TOURISM OUTLOOK

Table 3 – Annual growth* rates in tourism by category, 2006 to 2016

Day trips	Domestic Overnight	International	Total
6%	6%	9%	6%

* Average annual compound growth rate

Source: TRA, Urbis calculations

The chief factor influencing tourism in the Liverpool LGA over the next three years will be population growth. This is forecast to increase annually by over 3%.⁷

⁵ Destination NSW, 2016, *Travel to NSW Snapshot December 2016*

⁶ Destination NSW, 2016, *Travel to NSW Snapshot December 2016*

⁷ Australian Bureau of Statistics, 2017, *2016 Census of Population and Housing*; NSW Department of Planning and Environment, 2016, *New South Wales State and Local Government Area Population Projections*

For further information



Visit Us

Customer Service Centre
Ground Floor, 33 Moore Street, Liverpool, NSW 2170
Open Monday - Friday, 8.30am - 5pm



Phone

1300 36 2170
Calling from interstate: (02) 8711 7000
National Relay Service (NRS): 133 677
(for hearing and speech impaired customers)



Email

lcc@liverpool.nsw.gov.au



Post

Locked Bag 7064, Liverpool BC, NSW 1871



Website

www.liverpool.nsw.gov.au