

centralcoast

Central
Coast
Council

Central Coast

Destination Management Plan

2022-2025

Urban Enterprise
For Central Coast Council

Draft Report | November 2021

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FILE

Central Cost DMP Draft Report

VERSION

1

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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the traditional owners of the land on which we live, work and explore.

We recognise the continual cultural and spiritual connection to this nation and pay our respects to Elders past, present and emerging.

THANK YOU

Central Coast Council acknowledges the contribution made by stakeholders who took part in the consultation for this plan including Destination NSW & DSSN, Darkinjung Aboriginal Land Council, NSW National Parks & Wildlife Service, Forestry Corporation of NSW, industry groups, local businesses and community members.

ACRONYMS

DMP	Destination Management Plan
DNSW	Destination New South Wales
DSSN	Destination Sydney Surrounds North
IVS	International Visitor Survey
LGA	Local Government Area
PA	Per Annum
NVS	National Visitor Survey
TRA	Tourism Research Australia
VIC	Visitor Information Centre

GLOSSARY OF TERMS

Daytrip Visitor	Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.
International Visitor	A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.
Overnight Visitor	People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

ADMINISTRATOR'S MESSAGE

Like all of Australia, the Central Coast has taken a hit due to the COVID-19 pandemic however the region is also showing remarkable resilience and there is a strong understanding amongst our community and businesses that tourism will be key to helping the Central Coast economy recover and flourish.

Prior to COVID-19, the local tourism industry employed nearly 8,500 people and the Central Coast had 6.6 million visitors spending \$1.3 billion in our region. Despite COVID-19, 2021 data from Tourism Research Australia's National Visitor Survey showed that the Central Coast is ranked 25 out of 50 top destinations for overnight stays, and 13 for day trips. We've also seen some exciting new businesses pop up across the Coast and a number of established businesses have used the pandemic lockdowns to undertake makeovers and improve their service.

Tourism is a growing industry on the Central Coast and we need to support it while also protecting the place we love and call home.

The Central Coast Destination Management Plan is our roadmap to ensuring the long-term viability and sustainability of the region's visitor economy, including securing investment and grant funding to deliver targeted campaigns and initiatives.

This Plan outlines the community and Council's shared vision for the Central Coast as having a thriving, connected and supported tourism industry that provides compelling visitor experiences and positions the region as a premier sustainable tourism and lifestyle destination – and maps future actions to get there.

A deliverable of our last Destination Management Plan, we now have a refreshed approach to promoting the Central Coast as a destination through local stories, which received global recognition with the Central Coast named in the 2021 Top 100 Destination Sustainability Stories list competition, led by Green Destinations. A total of five Australian destinations were selected in the 2021 Top 100 List, the Central Coast proudly the only one from NSW.

The Central Coast is also on its way to becoming a certified Eco Destination through our Ecotourism Australia and WWF-Australia funded partnership, shoring up our recognition as a world-class destination for sustainable, nature-based tourism that will help attract an increasing number of visitors seeking sustainable travel experiences.

Our region also has a growing list of accolades, including winning 'Most Compelling Itinerary' in the NSW Top Tourism Town Awards 2021, and The Entrance named a Finalist in Wotif's Aussie Town of the Year Awards 2021.

Tourism is an important pillar of the Central Coast economy, one which we are committed to supporting alongside industry and all levels of government, and I am pleased to share the Central Coast Destination Management Plan 2022-25 to the community.

Rik Hart

Central Coast Council

EXECUTIVE SUMMARY

The Central Coast is a premier destination of New South Wales, home to an array of coastal, waterway and nature-based treasures, complemented by a breadth of arts, food and cultural experiences.

With a recently refreshed brand, strong appeal in the domestic market as well as emerging international market potential, the Central Coast has the opportunity to become a leading contemporary Australian visitor destination.

The Central Coast Destination Management Plan 2022-25 will guide the visitor economy, reflecting the aspirations and needs of the community, industry and Council.

This Project

Central Coast Council has engaged Urban Enterprise to prepare a Destination Management Plan (DMP) to guide development and growth of the visitor economy between 2022-2025.

The Destination Management Plan is a guiding document that establishes a shared vision and goals for the Central Coast visitor economy to ensure the long-term strength, success and sustainability of the Central Coast visitor economy.

This Plan is informed by independent research and analysis (see Appendix A for documents reviewed), as well as consultation with industry representatives, community groups, businesses, Council and Government stakeholders.

The Region

The Central Coast is situated on the coastline of New South Wales, strategically located within 90 minutes of both Sydney and Newcastle, providing access to a market of almost 6 million people.

The Central Coast attracted 6.6 million visitors in 2019, the majority of which were daytrip visitors (70%).

The Central Coast is part of Destination Sydney Surrounds North (DSSN), one of the six Destination Networks established across the state by Destination New South Wales (DNSW). The DSSN destination network includes the local government areas to the north and west of Sydney.



The Experience

The Central Coast provides for the quintessential Australian holiday, but offers much more than a traditional beach holiday experience.

The primary appeal of the Central Coast largely relates to the region’s water and nature-based assets, and associated recreation activities and attractions. The iconic coastlines and beaches, as well as the national and state parks throughout the region, shape the Central Coast as a leading tourism destination, capitalising on the region’s natural beauty. It provides a high quality visitor experience and a sense of escape with close proximity to Sydney.

Emerging strengths of the Central Coast include food, beverage and farmgate, arts, culture and heritage, and events and festivals.

Areas for enhancement and further development include towns and amenity, accommodation, and transport and access.

Majority of products and experiences are located within the South Coast and North Coast within the region. Gosford provides a regional city/urban experience with much potential for enhancement. The Hinterland region provides a rich rural and nature-based experience, however lacks visitor-ready products, experiences, amenity and infrastructure.

Strategic Considerations

A number of key considerations for the Central Coast visitor economy have emerged through the Destination Management Planning process. These have been summarised below.

<p>Destination Brand and Positioning</p> <ul style="list-style-type: none"> • Significant market opportunity for growth • Enhancement of the way the visitor understands Central Coast with consideration of the marketing hierarchy and promoting hero assets • Opportunity for wellness positioning • Build town narratives and promote unique selling propositions • Ensuring product is export ready • Night time economy activation • Enhancement of Gosford to a strong regional centre 	<p>Products, Experiences and attractions</p> <ul style="list-style-type: none"> • Leveraging Eco Destination Certification • Waterway activation • Cycle tourism opportunities • Building the “foodie” brand • Oyster and pearl farming • Indigenous tourism and cultural tours • Arts and culture infrastructure
<p>Events</p> <ul style="list-style-type: none"> • Lack of supporting infrastructure and indoor and outdoor venues for events, including attracting the MICE market • Opportunity to develop signature events • Utilising events to promote visitor dispersal • Growing sports events tourism 	<p>Infrastructure and Accessibility</p> <ul style="list-style-type: none"> • Large-scale and experiential accommodation investment to meet current shortfall and future demand • Improvement to public transport connectivity
	<p>Industry Development</p> <ul style="list-style-type: none"> • Strengthening awareness of Council role in tourism and communicating Council’s activities to industry • Staff training and workforce development to improve service level and customer experience

Strategic Framework

VISION

From headland to hinterland, a thriving, connected and supported industry will provide compelling visitor experiences that position the Central Coast as a premier sustainable tourism and lifestyle destination.

OVERARCHING OBJECTIVES

- Support investment in the visitor economy that positions the Central Coast an attractive place to live, work and play.
- Generate sustainable visitation patterns by increasing visitor dispersal and growing off-peak visitation.
- Grow visitor yield through product packaging, increasing length of stay and growing overnight visitation.
- Leverage the diverse experience offering to increase brand awareness in target markets and rewrite the Central Coast narrative.
- Build a cohesive and recognised brand that promotes an understanding of the region from hinterland to headland.
- Create high amenity, vibrant and activated towns, leveraging unique selling propositions to build town narratives.
- Continue to develop Central Coast as a leisure and business events destination through strategic partnerships.
- Attract investment in enabling infrastructure that will facilitate visitor economy growth.
- Encourage sustainable tourism and eco-tourism development that supports and leverages Eco Destination Certification.
- Empower a unified, connected and supported industry.

PERFORMANCE TARGETS

1. 10% growth in overnight visitors to Central Coast by 2025.
2. 15% increase in visitor expenditure.
3. 20% increase in visitation to Central Coast Hinterland by 2025.



Bouddi Coastal Walk - Bouddi National Park

Strategic Investment Themes and Transformative Projects

Key themes to guide future investment have been identified, in response to strategic considerations and objectives for tourism development on the Central Coast.

Transformative Projects aligned to each theme have been shown below. These are projects that will deliver

the greatest economic benefit for the region, and will support the positioning of the Central Coast as a leading New South Wales visitor destination.

Additional project opportunities have been identified in Section 8.

Theme	Focus	Priority Projects
1 Identity, Awareness and Placemaking	Building a strong brand identity to ensure the Central Coast is recognised as a premium and compelling holiday destination. Creating rich and active places across the seasons, a vibrant night-time economy and a sense of place will rewrite the Central Coast narrative.	<ul style="list-style-type: none"> • Central Coast Township Revitalisation Project • Night Time Activations and Enhancements • Seasons of Central Coast Marketing Campaign • Coast to Country Touring Itineraries
2 Eco Destination, Nature, Water and Trails	Celebrating the unique coastal and hinterland environment through product development and supporting infrastructure, facilities and services to create unparalleled and motivating nature-based and wellness experiences.	<ul style="list-style-type: none"> • Waterway Tourism Activation Strategy • Darkinjung Waterway Tour and Overnight Camping Experience • Develop a Signature Water Based 'Eco-Tourism' Experience/s that Strengthens Brand Identity
3 Produce, Creators and Culture	Showcasing diverse local narratives and telling the stories of the Coast's makers and creators, the abundant natural produce, and the layers of culture and heritage.	<ul style="list-style-type: none"> • Hinterland Agri-Tourism 'Visitor Ready' Program • Oyster 'Food Brand' and Supporting Product Development • Foodie Events Program
4 Events, Festivals and Conferencing	Delivering signature events aligned to the region's comparative strengths, utilising the regions natural assets to build a strong events brand and growing the business and conferencing events sector to develop a robust and sustainable year-round visitor economy.	<ul style="list-style-type: none"> • Develop concept of Harvest Festival • Central Coast Stadium Precinct Masterplan • Business Events Marketing and Attraction Action Plan
5 Enabling Infrastructure	Developing strong foundations for visitor economy growth through infrastructure, transport connections, accommodation, accessible destinations and visitor services that support a thriving Central Coast.	<ul style="list-style-type: none"> • Connecting Central Coast - Public Transport Advocacy Project • Sydney to Gosford High Speed Ferry • Accommodation Investment
6 Industry Development and Collaboration	Empowering and supporting industry development through engagement, collaboration, training and enhanced connection to create a resilient and visitor ready industry across the Central Coast.	<ul style="list-style-type: none"> • Central Coast Tourism Excellence Program • Development Approval Business Concierge • Business Networking and Communication



Part A
Assessment

1. OVERVIEW

1.1. OVERVIEW

Central Coast Council (Council) has engaged Urban Enterprise to prepare a Destination Management Plan (DMP).

The Central Coast Destination Management Plan 2022-2025 is a key strategic document for Council to guide development and growth of the visitor economy over the next four years.

The aim of the project is to establish a shared vision and goals for the Central Coast visitor economy. The Destination Management Plan will be a guiding document that includes a range of strategies, actions and priority projects that will ensure the long-term strength, success and sustainability of the Central Coast visitor economy.

This Plan is informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, Council and Government stakeholders.

1.2. VISITOR ECONOMY ROLE

The Central Coast is situated on the coastline of New South Wales, strategically located within 90 minutes of both Sydney and Newcastle, providing access to a market of almost 6 million people.

Central Coast is a peri-urban LGA bordering the Northern Beaches and Hornsby to the South and Lake Macquarie to the North, with the Pacific Motorway dissecting the LGA. This provides convenient access to metropolitan Sydney, and disperses visitors into northern and western regional New South Wales via the Central Coast.

The Central Coast has a population of 328,000, expected to grow substantially to 417,500 by 2036.

The Central Coast is part of Destination Sydney Surrounds North (DSSN), one of the six Destination Networks established across the state by Destination New South Wales (DNSW). The DSSN destination network includes the local government areas to the north and west of Sydney.

The Central Coast is shown in Figure F1 below, in the context of the broader region.

F1. CENTRAL COAST COUNCIL



1.3. COVID-19 IMPACTS ON ECONOMY

The Central Coast visitor economy has been impacted by COVID-19 across 2020 and 2021.

The Central Coast economy is highly reliant on tourism, with 21% of jobs in the local economy attributed to accommodation and food services, retail trade and arts and recreation services. This does not include other sectors that support and service the tourism industry such as transport, professional services and cleaning services.

The Central Coast has experienced dual impacts as a result of its peri-urban location on the boundary of metropolitan Sydney. The Coast has suffered the strict metropolitan LGA restrictions at times, and other times has been treated as a regional NSW LGA, but lost its key source market of Greater Sydney.

Economy Id. provides economic modelling for COVID-19 job impacts, which included the following impacts on these sectors for the September 2020 quarter¹:

- Accommodation and Food Services (-3,788 local jobs)
- Retail Trade (-959 local jobs)
- Arts and Recreation Services (-832 local jobs)

This does not take into account the extended four month lockdown occurring between June to October 2021 in New South Wales, for which data is yet to be released.

1.4. BEST PRACTICE DESTINATION MANAGEMENT

Destination Management Planning is based on the holistic consideration of a region’s tourism industry, and the tourism industry’s position in the regional economy. Destination Management Plans reflect the attributes of each destination, providing a blueprint for future investment in tourism including new experiences and attractions, and infrastructure requirements (roads, parks, technology) to support visitor growth.

The DMP for Central Coast will follow the Guide to Best Practice in Destination Management, as developed by the Australian Regional Tourism Network (ARTN).

1.5. DESTINATION MANAGEMENT PLAN PROCESS

The following process was undertaken to inform the development of the Destination Management Plan.

 <p>Research, Discovery & Assessment</p>	<ul style="list-style-type: none"> • Reviewed 20+ documents • Research into target markets (TRA, DNSW) • Product audits inventorying top attractions, supporting products, events and infrastructure
 <p>Engagement</p>	<ul style="list-style-type: none"> • Industry and community workshops (x4) • Industry and community survey • Council workshops (X3) • Consultation with state government agencies and private operators
 <p>Issues & Opportunities</p>	<ul style="list-style-type: none"> • Identification of issues and opportunities based on assessment, engagement, and product audits
 <p>Strategy</p>	<ul style="list-style-type: none"> • Development of strategic framework, including vision, objectives and identification of priority projects

¹ Economy Id, based on National Institute of Economic and Industry Research (NIEIR) Version 2.1 (Sept 2020)

2. STRATEGIC CONTEXT

2.1. STRATEGIC POLICY CONTEXT

Alignment to strategic policy and direction is critical to the success of the Central Coast DMP. Key documents reviewed are listed in Appendix A.

The NSW Visitor Economy Strategy 2030, the Statewide DMP (2019), and the DSSN DMP (2018 and 2022) are the key strategies guiding visitor economy development across the State.

These documents provide a range of findings and strategic directions relevant to development of the Central Coast visitor economy. These are summarised in adjacent Figure F2.

The NSW Visitor Economy Strategy outlines five strategic pillars, each with key areas of focus, set to achieve the NSW Government’s vision to ensure the state becomes the premier visitor destination in the Asia Pacific. These five strategic pillars include:

1. Road to recovery;
2. Build the brand;
3. Showcase our strengths;
4. Invest in world-class events; and
5. Facilitate growth.

The Statewide DMP identifies the Central Coast as one of 16 current hero destinations in NSW. Through consultation with DSSN, the following hero categories and experiences were identified within the Central Coast:

- Aquatic and coastal experiences;
- Nature and adventure experiences,
- Journeys and touring routes,
- Caravanning and Camping;
- Food and drink experiences;
- Business events; and
- Events and festivals.

F2. KEY STATE AND REGIONAL PRIORITIES

Develop and promote Aboriginal cultural experiences	Market-ready and export-ready experiences
Become recognised amongst the world’s leading food and wine destinations	Leverage domestic and international visitor demand for high-quality, authentic food and wine experiences
Keep pace with rapid expansion of geographic source markets within China	Attract and secure high value major events
Maximise yield and dispersal from the visitor economy	Position Sydney and NSW as world leading tourism and events destinations
Build industry capacity, capability, resilience and productivity	Target industry and business to grow conferencing and business events.

2.2. DEVELOPMENT CONTEXT

An overview of major projects and investments underway by the public sector have been provided below, in relation to NSW and the Central Coast.

Key relevant State infrastructure projects underway but not within the Central Coast include:

- Western Sydney Aerotropolis (due to be completed by 2026)
- Pacific Motorway M1
- Newcastle Airport Upgrade, attracting increased domestic flights and upgrade

These projects will support transport and access to the Central Coast and have an impact on future visitation potential.

Gosford City Centre Revitalisation

Major revitalisation of the Gosford CBD is underway, funded by the State Government and supported by the Hunter and Central Coast Development Corporation. Revitalisation of Gosford has been identified as a key priority of the Central Coast Regional Plan 2036.

Works completed to date include redevelopment of the Gosford waterfront precinct, infrastructure upgrades (water, sewer and electricity), redevelopment of the hospital precinct and redevelopment of the University of Newcastle site.

Planning and works at the university precinct are currently underway, the precinct will support over 7,000 students and provide opportunity for Gosford to develop as a university town. A university partner is yet to be announced.

Key private sector activations that will contribute significantly to the visitor economy in Gosford include:

- St Hilliers Central Coast Quarter project, comprising 295 residential apartments across two towers, a 183-room hotel as well as commercial and retail space.
- Conexions, a \$115 million mixed-use development at Gosford Racecourse, which will feature a resort-style hotel, residential apartments, entertainment and recreation facilities and public spaces

These projects will support growth in a range of visitor markets including business conferencing.

Warnervale Airport, Wyong

The Warnervale Airport provides a unique opportunity for the Central Coast in aviation, as the only provider of general aviation for the Sydney basin.

Key upgrades include widening the runway from 10 to 30 metres and upgrading taxiways and aprons to support charter flights, sky divers, joy flights, air shows, and performance flights.

Other Major Projects Planned for Central Coast

- Mount Ettalong Reserve Viewing Platform
- ECO Destination Certification with Ecotourism Australia and WWF-Australia
- Magenta Shared Pathway Project
- Bouddi National Park Walk Upgrade
- The Entrance Visitor Information Centre (VIC) Upgrade
- Umina Sports Precinct
- Terrigal Lagoon Trail
- Other privately lead projects

2.3. TOURISM GOVERNANCE

Tourism on the Central Coast is led by a well-resourced Council team, with skills in a range of tourism areas including events, marketing, communications, product development and attractions.

Central Coast Council engages with state tourism organisations to undertake strategic planning, undertake cooperative marketing and build industry capacity. This includes Destination New South Wales (DNSW), the peak State Government body for tourism, as well as Destination Sydney Surrounds North (DSSN), the destination network promoting Central Coast Council and 13 other local government areas.

Council is responsible for tourism and infrastructure development, destination marketing and visitor information servicing.

Council engages with a range of informal and formal tourism organisations, and provided opportunities for industry networking prior to COVID-19 impacts. Council fund a contracted position for Tourism Industry Services, to ensure ongoing and effective communication between Council and industry.

T1. GOVERNANCE STAKEHOLDERS

Stakeholder	Overview	Responsibility
Destination New South Wales (DNSW)	DNSW is the lead State government funded agency for the NSW tourism and major events sectors, responsible for devising and implementing strategies to grow the State's visitor economy.	<ul style="list-style-type: none"> - Marketing and promotion - Events attraction and promotion - Deliver and administer funding
Destination Sydney Surrounds North (DSSN)	One of six Destination Networks encompassing 13 LGAs; Blue Mountains, Central Coast, Cessnock, Dungog, Hawkesbury, Lake Macquarie, Maitland, Muswellbrook, Newcastle, Penrith, Port Stephens, Singleton and Upper Hunter.	<ul style="list-style-type: none"> - Develop and implement a regional DMP - Advocacy - Business and industry development (workshops, resources etc)
Central Coast Council	Council provides a range of tourism services including overseeing and delivery visitor information services, digital media and communication, major events attraction and support, marketing, industry development and investment.	<ul style="list-style-type: none"> - Advocacy - Implement and build destination brand - Marketing and promotion, including co-operative marketing campaigns with Local Tourism Industry and Destination NSW - Events attraction and promotion - Infrastructure and asset maintenance - Industry engagement and networking - Industry development and capacity building - Collateral development
Local Tourism Industry	There are a range of formal and informal tourism industry groups, committees and associations that Council engages with.	<ul style="list-style-type: none"> - Advocacy - Industry networking - Events development and operation - Local collateral development in partnership with Council - Visitor and customer experience

2.4. LOCAL INSIGHTS

Stakeholder engagements were undertaken by Urban Enterprise to facilitate the development of the Central Coast Destination Management Plan. The engagements were undertaken virtually via videoconferencing, across August and September 2021, due to COVID-19 restrictions.

To gain an in-depth understanding of the region, Urban Enterprise conducted 1 to 1 stakeholder engagements, industry workshops, and a business and community survey. This included:

- Eight 1 to 1 stakeholder engagements with key government agencies and key local operators identified by council.
- Four industry workshops attended by over 30 industry members, undertaken across four sub-regions to identify specific issues and opportunities.
- A community and business survey, distributed by Council, to broaden the understanding of challenges and opportunities across the region. The survey received approximately 650 responses from members of the community and local operators.

LOCAL INSIGHTS AND FINDINGS

Product, Experience and Events

- Low awareness of the diverse product offering.
- Lack of icon, stand out products/experiences.
- Need to improve waterway activation (aside from beaches), including touring and cruising.
- Need for enhanced product packaging.
- Low commercial accommodation supply and diversity.
- Need to diversify food offerings (including cultural diversity) and improve quality and consistency.
- Activating night-time economy and providing a range of entertainment and activities.
- Opportunity to build a 'foodie' brand for the Coast.
- Showcase local Indigenous heritage.

Enabling Infrastructure

- Lack of accommodation to support overnight visitation and events growth.
- Lack of public transport.
- Need for additional parking provision, particularly in Gosford and South Coast towns.
- Challenge to meet growing infrastructure needs to support increased visitor demand.
- Poor wayfinding signage and visitor services (lack of physical guides, maps etc).
- Need for township beautification, streetscaping, activation of vacant buildings and reinvestment.
- Need to address waterway health concerns.

Markets and Marketing

- Lack of a clear identity and competitive messaging.
- Lack of awareness or poor perceptions of the Central Coast.
- Need to develop itineraries that promote dispersal across the Central Coast, particularly into the hinterland.
- Proximity to Sydney and Newcastle major opportunity.
- Western Sydney identified as a market opportunity, but low yield. Northern and Central Sydney emerging markets with high yield proposition.

Industry Needs

- Desire for more effective communication between Council and industry.
- Desire for more networking and business collaboration opportunities amongst industry.
- Continuation of Tourism Industry support that provides a representative voice into Council.
- Staff and youth retention.
- Workforce shortages and difficulty attracting skilled and unskilled labour.
- Poor customer service an endemic issue.

3. VISITOR ECONOMY

3.1. VISITOR ECONOMY SNAPSHOT



**6.6 M visitors
in 2019**

70% daytrip
29% overnight
1% international



**\$1.3 B spend
in 2019**

26% daytrip
64% overnight
10% international



**\$349 M
daytrip spend**

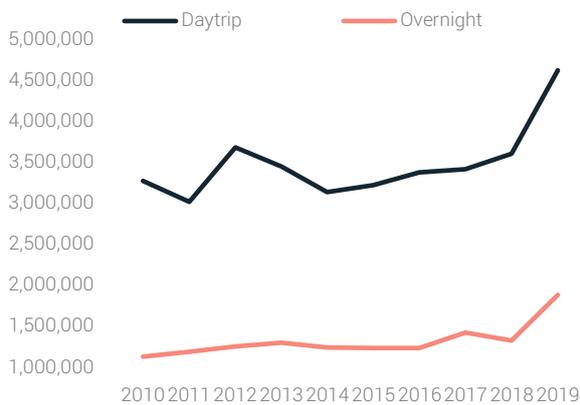
\$75 av/spend
*\$108 av/spend
Newcastle*



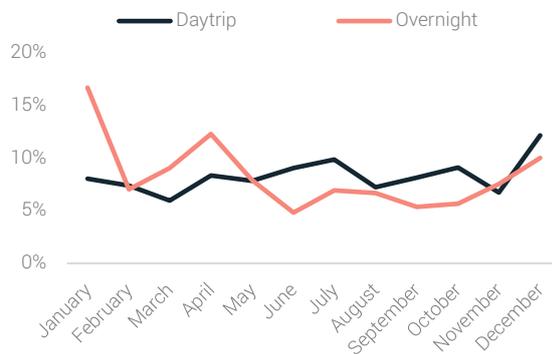
**\$847 M
overnight spend**

\$449 av/spend
*\$569 av/spend
Newcastle*

Historic Visitation Growth



Seasonality



The Central Coast has a vibrant visitor economy, attracting 6.6 million domestic visitors in the 2019 calendar year, and 54,000 international visitors. Tourism Research Australia visitation data from 2019 has been used to reflect a business as usual scenario, prior to the COVID-19 pandemic.

The visitor economy is dominated by almost 5 million daytrip visitors (70%), owing to its peri-urban location adjacent to major population centres of Greater Sydney and Newcastle. Daytrip visitors are relatively low yield, accounting for \$349 million in visitor spend (26% of total spend), with a low average expenditure of \$75 per visitor.

Whilst overnight visitation is much lower at 1.9 million, it accounts for the majority of visitor spend (\$847 million). This is due to higher average expenditure of overnight visitors (\$449 per visitor). Overnight spend is however significantly lower than Newcastle (\$569), due to the high proportion of

visitors staying with friends and relatives and engaging in low-yield outdoor activities. A key objective of the DMP will be to grow visitor yield.

Overnight visitation to the Central Coast is highly seasonal, which is likely to be largely driven by the VFR and holiday home markets during school holiday periods. Both daytrip and overnight visitation peaks across the height of summer in December and January.

The Central Coast has seen strong annual daytrip (+4% p.a.) and overnight (+5% p.a.) visitation growth. This is in line with visitation growth to metropolitan Sydney and regional NSW. The Central Coast experienced a major spike in visitation in 2019, which can be attributed to the growth in tourism in the area as a result of Council's Have a Little Adventure tourism campaign.

3.2. SUB-REGIONAL VISITATION

An analysis of visitation and visitor spend across the Central Coast has been undertaken to understand visitor dispersal across the Council area.

The majority of visitor destinations are located along the coast, with visitors generally undertaking lower-

yield activities such as visiting friends and relatives, sightseeing and going to the beach. There is an opportunity for the DMP to explore opportunities for further hinterland tourism development and investment in bookable products and experiences.

F3. SUB-REGIONAL VISITATION



Source: Tourism Research Australia, 2019, Statistical Area Level 2 (SA2s).

3.3. SOURCE MARKETS

The Central Coast is primarily an intrastate visitor destination.

New South Wales accounts for all day trip visitors (100%), of which the majority are from Sydney (59%). Figure F5 adjacent shows that a large proportion of daytrip visitors within Sydney are from the northern and western suburbs of Sydney.

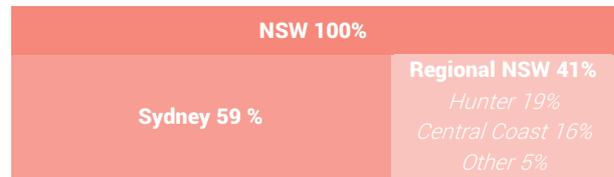
The vast majority of overnight visitors are from New South Wales (87%). Sydney is overwhelmingly the key source market for NSW overnight visitation, accounting for 72% of NSW visitors. Within Sydney, the inner Councils present an emerging, high yield target market opportunity.

Interstate visitors account for 13% of visitation. There is opportunity to grow the Central Coast interstate visitor market through development and promotion of hero attractions, and increasing consumer brand awareness. Lack of direct passenger flight access is a significant barrier, however working with Newcastle may present an opportunity for growth.

Key international markets include the United Kingdom, New Zealand, the USA and Asia. There is opportunity to begin considering international target markets when international travel returns.

F4. VISITOR MARKET ORIGIN

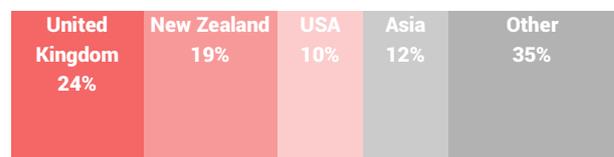
Daytrip Visitor Origin



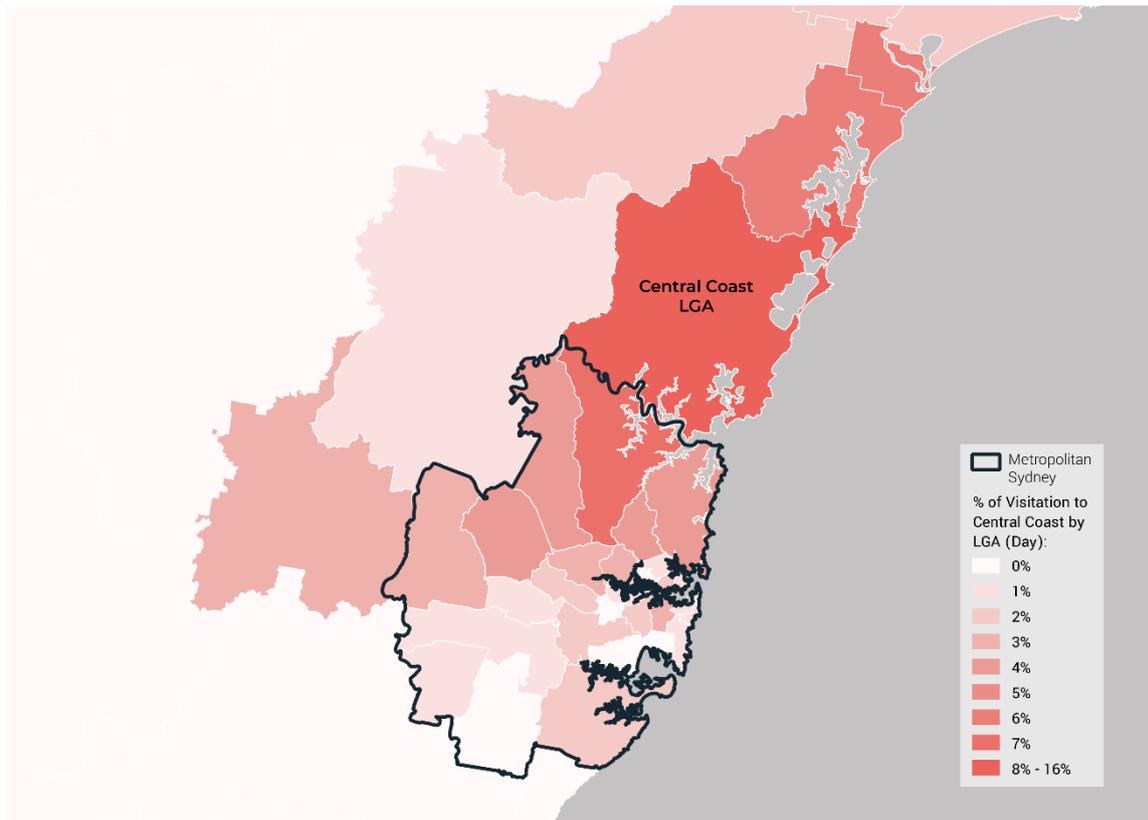
Overnight Visitor Origin



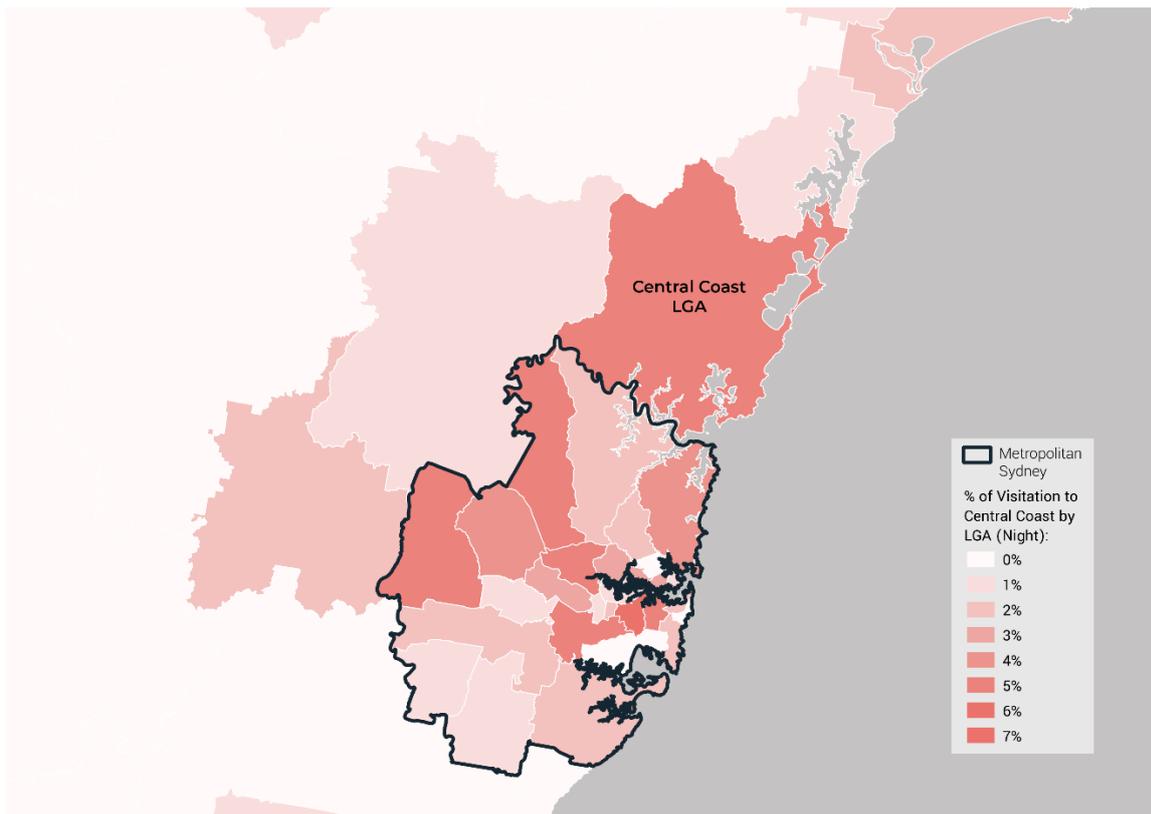
International Visitor Origin



F5. DAYTRIP VISITOR ORIGIN



F6. OVERNIGHT VISITOR ORIGIN



3.4. VISITOR PROFILE

DAYTRIP VISITOR PROFILE

Majority of the daytrip visitor economy on the Central Coast is driven by holiday visitors (41%) and visiting friends and relatives (38%). There is a major opportunity to grow the holiday visitor market, as well as the business market.

When benchmarked against Newcastle, the Central Coast has higher levels of holiday daytrip visitors, however lower levels of business travel. This reflects the strength of the business market in Newcastle, and the appeal of the Central Coast’s beaches and nature based assets in driving holiday visitation.

One third of all daytrip visitors to central coast are older couples. This presents opportunity to grow mid-week travel within the Central Coast.

The Central Coast has lower levels of visitors dining out when compared with Newcastle. This potentially reflects a lower supply of destination dining experiences on the Central Coast compared to Newcastle.

■ Central Coast ■ Newcastle

Purpose of Visit



Holiday

41% Central Coast
36% Newcastle



Visiting Friends and Relatives

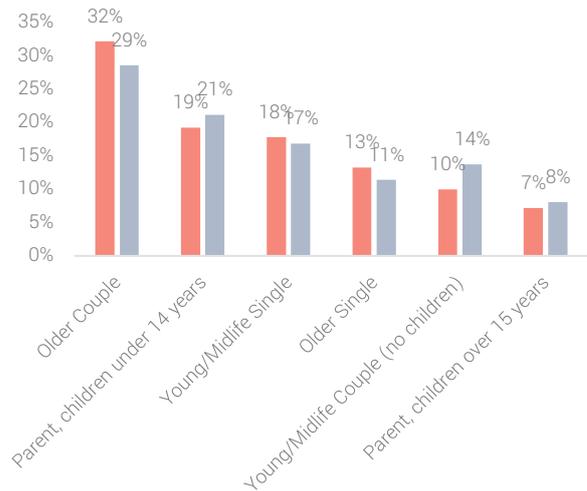
38% Central Coast
33% Newcastle



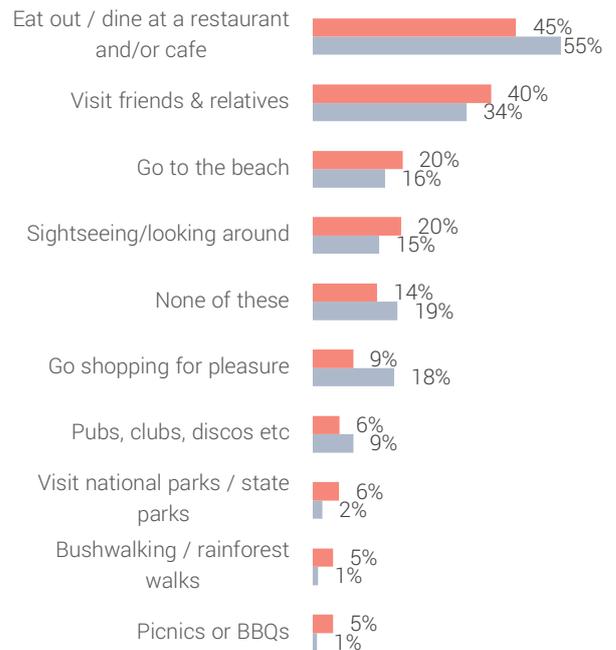
Business

12% Central Coast
18% Newcastle

Lifecycle Group



Activity Profile



OVERNIGHT VISITOR PROFILE

The Central Coast, when compared to Newcastle has a substantially lower business market, reflecting the strength of Newcastle’s economy and business base. Conversely the Central Coast has a relatively large proportion of overnight holiday leisure visitors.

Further investment in visitor accommodation and conferencing facilities will help strengthen overnight visitation to the Central Coast.

Older couples are the largest overnight market for the Central Coast. There is continued potential for growth in this market as the population of Sydney ages and becomes more mobile in retirement.

Similar to the daytrip market, the overnight market of the Central Coast also has a lower level of visitors dining out. This confirms the potential lack of dining for visitors within the Central Coast.

■ Central Coast ■ Newcastle

Purpose of Visit



Holiday

42% Central Coast
21% Newcastle



Visiting Friends and Relatives

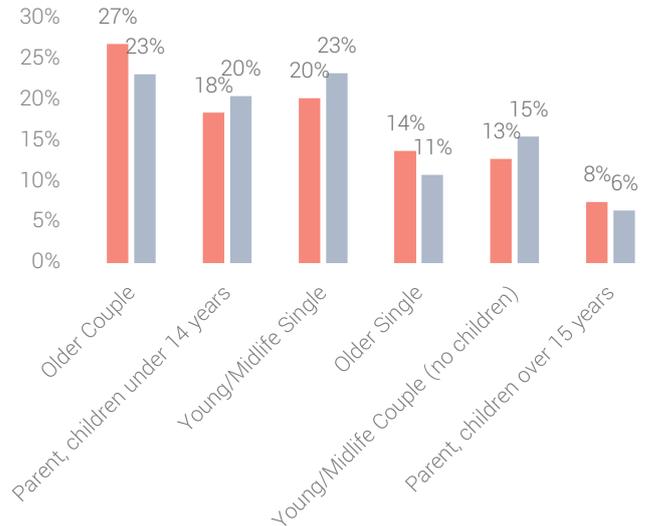
45% Central Coast
46% Newcastle



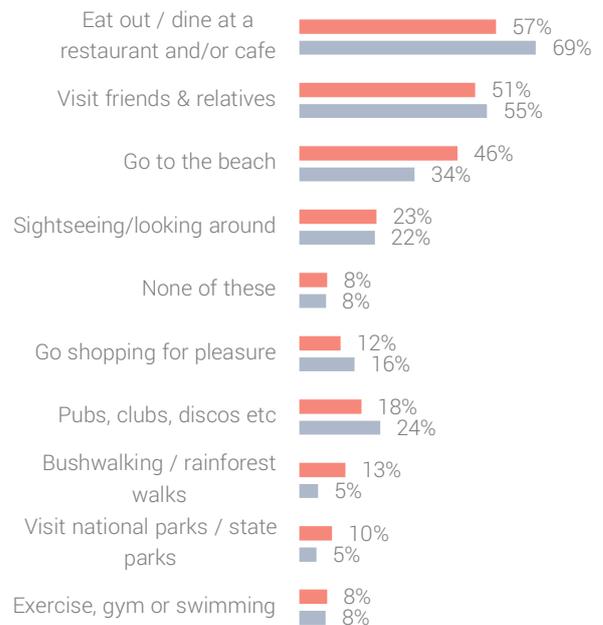
Business

8% Central Coast
25% Newcastle

Lifecycle Group



Activity Profile



3.5. TARGET MARKETS

The following have been identified as the target markets for the Central Coast. Some of these are existing markets, others have been identified in terms of their potential to drive visitation and yield.

Target markets below are summarised as lifecycle groups and geographic targets based on existing visitor patterns and understanding of market potential.

T2. TARGET MARKETS

	Market Overview	Opportunity
Domestic Market	<p>Visiting Friends and Relatives Market</p> <p>40% of visitors travelling to the Central Coast are visiting friends and relatives and 50% of visitors staying overnight are staying with friends and family. With a growing population of 300,000 in Central Coast the Visiting Friends and Relatives market will strengthen.</p>	There is opportunity to undertake a targeted campaign of locals to promote local products and experiences, and increase awareness of Central Coast destinations and experiences for residents.
	<p>Over 55</p> <p>Over 42% of visitors to the Central Coast are aged over 55. This market is strategically important as many are retired, or semi-retired and have flexibility to travel mid-week. This aligns well with the strategic direction of the DMP which is focused on dispersal of visitors.</p>	Targeted campaigns should be considered for the over 55 market to visit midweek. This should consider product and triggers for visitation for this market including food, touring and passive nature-based experiences.
	<p>Young Sydneysiders</p> <p>Around 26% of the Central Coast market are those aged between 15-24. The Central Coast with its close proximity to Sydney makes it a short break escape for this market.</p>	Targeted social media campaigns and use of influencers should be considered for young Sydneysiders. This should consider both hinterland and coastal experiences.
	<p>Family Market</p> <p>19% of visitors are young families with children aged under 14. This is much lower comparatively than other beach destinations and may be the result of limited accommodation and cost of accommodation for this market.</p>	Investment in family friendly accommodation as well as experiences should be considered for the Central Coast. The family market requires larger self-contained accommodation and tourist parks to drive visitation. Targeted investment in these products will support family market visitation. In addition, there are hinterland attractions that would benefit from targeting the family market from across Sydney.
	<p>Meetings, Incentives, Conventions and Exhibitions (MICE) – Business Events</p> <p>The construction of two major hotels in Gosford, combined with the existing accommodation stock on the Central Coast provides the basis for accommodating the meetings, incentives, conferences and exhibitions market.</p>	Conference, meetings and exhibition facilities on the Central Coast combine with accommodation providers should consider ways to collaborate and target this market. The development of an online portal which shows all event venues in one location will support growth and awareness in the market.
International Market	<p>International Experience Seekers</p> <p>The international market has been impacted significantly by COVID 19 restrictions on travel, however as restrictions ease and international travel rebounds there is opportunity to capture a greater share of this market based on the nature-based assets and attractions within Central Coast.</p>	Packaging of attractions and products into the international wholesale market will support future international visitation. In addition, international experience seekers are motivated by social media and social media campaigns should also consider motivating content targeted to international markets.
Geographic Market	<p>Inner Sydney and Outer North Western Sydney</p> <p>Most overnight visitors to Central Coast have their origins in inner and western Sydney. The population in these areas in excess of 3 million residents.</p>	Promotion for Central Coast should focus on weekend holiday escapes, targeted to north western and inner Sydney.

4. PRODUCT, EXPERIENCE AND EVENTS

The Central Coast provides for the quintessential Australian holiday, but offers much more than a traditional beach holiday experience.

The primary appeal of the Central Coast largely relates to the region’s water and nature-based assets, and associated recreation activities and attractions. The iconic coastlines and beaches, as well as the national and state parks throughout the region, shape the Central Coast as a leading tourism destination, capitalising on the region’s natural beauty. It provides a high quality visitor experience and a sense of escape with close proximity to Sydney.

Emerging strengths of the Central Coast include food, beverage and farmgate, arts, culture and heritage, and events and festivals.

Areas for enhancement and further development include towns and amenity, accommodation, and transport and access.

Majority of products and experiences are located within the South Coast and North Coast within the region. Gosford provides a regional city/urban experience with much potential for enhancement. The Hinterland region provides a rich rural and nature-based experience, however lacks visitor-ready products, experiences, amenity and infrastructure.

Primary Strengths

Coast and Waterways



Nature-based



Recreation and Attractions



Emerging Strengths

Food, Beverage and Farmgate



Arts, Culture and Heritage



Events and Festivals



Supporting Infrastructure

Accommodation



Transport and Access



Towns and Amenity



Primary Product Strengths

Coast and Waterways

Waterways are a primary strength of the Central Coast visitor economy, including beaches, rivers, lakes, bays and estuaries. These natural assets define the visitor experience, particularly along the coastline.

On-water activities include swimming, surfing, canoeing and kayaking, fishing, reef diving, and guided boat tours. Surfing is a major driver of year-round visitation and there are many breaks that are well renowned across the region.

Waterway access to the Coast is varied, with opportunity to improve wharves, jetties, boat ramps and ocean baths to increase access to waterways and foreshores. There is in particular opportunity to activate the unique lakes and river systems of the Coast, as well as better leverage and activate the Brisbane Waters at Gosford.

Opportunities for waterway investment:

- Waterway trails for self-guided canoeing and kayaking.
- Waterway tours, particularly about environmental education.
- Upgrade and maintain wharves, jetties, boat ramps and ocean baths to improve access to and activation of natural waterways and foreshores.
- Improved access to waterways for recreation and entertainment, such as houseboats and floating bars.
- Investigate the designation of a Central Coast beach as a World Surfing Reserve.

Nature-based

Nature-based tourism is a major drawcard for the Central Coast region. The region has a diverse range of nature-based assets, including National/State parks, walks/hikes, and other recreation assets including golf-courses.

The region is home to many significant parks, such as Bouddi, Brisbane Water, Popran and Wyrribalong National Parks, Munmorah State Conservation Area and a number of state forests. A variety of supporting activities are provided at these nature-based assets, such as lookouts and formalised walking trails.

The Bouddi Coastal Walk is a premier 8.5 kilometre walk through the Bouddi National Park, the eighth most visited national park in New South Wales. The Coast has an abundance of natural assets with impressive lookouts, such as the Skillion in Terrigal or Mount Ettalong Lookout.

There is opportunity for development of further coastal walks, such as walks that could link the North Coast, taking in the Norah Head Lighthouse.

There is opportunity for positioning as a wellness and relaxation destination, harnessing the abundance of natural assets to provide an 'escape' from Sydney in close proximity.

Opportunities for nature-based and recreation investment:

- Development of iconic walks, particularly additional coastal walks in the North Coast and hinterland walks.
- Continued investment in National and State Parks infrastructure.
- Multi day walking experiences linking to Sydney.

Recreation and Attractions

The extensive nature-based assets across the Central Coast region support a range of sport and recreational activities, including adventure-based pursuits such as 4WDing, adventure activities, fishing and boating.

Additionally, the Central Coast has a large supply of attractions, including the Australian Reptile Park, Australia Walkabout Wildlife Park, Glenworth Valley Outdoor Adventures and Broken Bay Pearl Farm. These experiences are largely concentrated in the Hinterland region.

Cycling is an untapped opportunity for the Central Coast, particularly mountain biking.

Ourimbah Mountain Bike Park is currently the only formalised mountain biking offering across the Coast. There is opportunity to develop further authorised mountain bike trails in the region targeted to the Sydney market. This will provide an additional experience for visitors and add depth to the visitor experience.

Opportunities for recreation investment:

- Support development of authorised mountain bike trail opportunities.
- Seek opportunities for mapping and promoting authorised mountain bike trails across the Central Coast.
- Identify opportunities to package attractions and entertainment to increase visitor dispersal, length of stay and yield.
- Develop export ready products such as pearl farming.
- Develop a diverse range of attractions and entertainment to attract visitation and increase length of stay.
- Prioritise unique attractions of scale that can grow consumer awareness.

Food, Beverage and Farmgate

The Central Coast is beginning to develop a high-quality food and drink offering, with young entrepreneurs breathing new life into the region's dining scene.

Recent investment in new restaurants and chef-hatted dining establishments, is supporting the potential foodie positioning of the Central Coast.

The region has the opportunity to be known for its abundance of high quality natural produce and producers. This includes the farming of high quality Sydney Rock Oysters, local artisans showcased through the Meet the Makers Trail (such as a cheese maker and chocolate factory), wineries and breweries, and pick your own fruit experiences.

The Hinterland region provides a major opportunity for growth in unique food experiences, however lacks visitor ready and high quality dining experiences to attract target visitor market. Capitalising on local produce and farmgate experiences with quality infrastructure that matches the high amenity natural environment, will allow the hinterland to grow as a high-quality visitor destination.

A range of challenges in the food scene persist, including a largely homogenous cuisine and experience offering, particularly along the Coast, and inconsistent and at times poor customer service, hospitality and food quality. These have been identified as ongoing challenge across the Central Coast by operators and community alike.

Opportunities for food, beverage and farmgate investment:

- Development of visitor ready food experiences in the hinterland, including paddock to plate restaurants, farmgate experiences and dining located in nature-based settings.
- Development of hero food experiences that capitalise on unique offerings such as oysters.
- Development of diverse food experiences, including a variety of cuisines.

Arts, Culture and Heritage

There is a growing arts, culture and heritage scene throughout the Central Coast region, including art galleries, theatres and a museum. These products are mostly concentrated in the North and South Coast regions.

The region lacks major arts and cultural facilities. Recent investment in Art House Wyong provides an opportunity for arts and culture events.

Currently, cultural tourism experiences are provided by Darkinjung Aboriginal Cultural Education Tours and Girri Girra Aboriginal Experiences. There is an opportunity to support Traditional Owners to develop new Indigenous cultural tourism products and experiences in the region.

Opportunities for arts, culture and heritage investment:

- Support development of new aboriginal products and experiences in the region.
- Foster creative and performing arts through theatres, galleries and creative spaces, by integrating art and performance into public life.
- Investigate opportunities for art and sculpture interventions throughout Central Coast including lighting installations in entertainment precincts.

Events and Festivals

The Central Coast events and festivals calendar provides a range of small to midscale events, which are mostly located in the South Coast region. Popular events hosted in the region include ChromeFest, Lakes Festival and Harvest Festival.

Dispersing events across the Central Coast, as well as across the year and week, is required to develop a sustainable events calendar.

There is opportunity to further develop events that are well aligned to the Central Coast product offering, such as the Lakes Festival and Harvest Festival. These events showcase and celebrate the natural landscape, local produce, and makers and creators, and provide an opportunity to further build the Central Coast brand.

Venues and Facilities

The Central Coast has a number of small to midscale event venues supporting corporate and social events, as well as tourism events. The Central Coast lacks both indoor and outdoor facilities that can host major tourism and business events, aligned to both event operator and consumer expectations.

The majority of business event facilities are located in the South Coast sub-region, particularly at hotels and accommodation facilities. Gosford provides some conferencing facilities catering for groups up to 300, including the Gosford Racecourse.

The Central Coast lacks a dedicated conferencing and events centre to support major events. Gosford is well positioned to support a facility of this type and scale, with significant public sector investment and slated private sector accommodation investment.

Key outdoor event venues include Mt Penang Gardens, Parklands and Event Park, and Memorial Park at The Entrance. These facilities have some capacity and parking constraints. There is opportunity to utilise private and public spaces in the hinterland to develop iconic events destinations that leverage the regions natural aspect and amenity.

Across the Central Coast, accommodation and transport are major barriers to growing the events sector across the Central Coast.

Opportunities for events development:

- Develop events at off-peak times, including autumn, winter, and mid-week.
- Prioritise events that promote and take pressure off high visitation destinations.
- Develop multi-day events that promote visitor dispersal across the Central Coast.
- Harness and enhance festivals aligned to the Central Coast product offering and strengths.
- Develop a range of foodie events that capitalise on the regions local produce strengths and help to brand the region.
- Prioritise development of infrastructure at outdoor event locations that leverage the natural environment and can become hero venues for the Central Coast.

Supporting Infrastructure

Accommodation

The Central Coast accommodation supply is dominated by short-term holiday rentals, including Airbnb and Stayz. AirDNA data indicates there are approximately 2,339 self-contained units, apartments and houses, the majority of which are for entire homes (94%).

The region has a small supply of commercial accommodation, the majority of which includes standard/mid-scale hotels and motel/motor inns. This is demonstrated in the adjacent table, which showcases the type of accommodation stayed in by visitors to the Central Coast compared to the average of benchmarked visitor destinations².

The benchmarking demonstrates a major gap in hotel/resort/motel or motor Inn accommodation (-9%) and caravan park or commercial camping grounds.

There is a lack of luxury and premium/boutique accommodation facilities in the Central Coast. These are required to meet current visitor demand and attract higher yielding visitor markets. Much of the regions accommodation stock is tired and in need of reinvestment to meet contemporary visitor expectations.

In addition, investment in accommodation facilities of scale in strategic locations is required to grow the events sector and to grow yield from visitors.

T3. CENTRAL COAST VISITOR ACCOMMODATION BENCHMARKING

	Central Coast	Average of Benchmarked Destinations	Balance
Commercial Accommodation			-18%
Hotel/resort/motel or motor Inn	19%	28%	-9%
Rented house/ apartment/flat/unit	7%	11%	-4%
Caravan park or commercial camping ground	6%	10%	-4%
Other Commercial	2%	3%	-1%
Non-commercial Accommodation			+14%
Friends or relatives property	50%	41%	+9%
Own property	9%	2%	+7%
Caravan or camping - non commercial	2%	5%	-3%
Other Private	5%	5%	+1%

Source: Tourism Research Australia, 2019.

² Benchmarked destinations that comprise the "Average of Benchmarked Destinations" includes the LGAs of: Byron, Newcastle, Sunshine Coast and Wollongong.

Accommodation Demand Analysis

In 2019, there was a total of 1.9 million visitors staying overnight across the Central Coast, of which only 661,000 were staying in paid accommodation (34%). Utilising the shortfall of 18% commercial accommodation detailed previously, it is estimated there is currently additional commercial visitor demand of 340,000.

Based on the current shortfall in paid accommodation, the table below provides an indication of current accommodation needs. The analysis utilises the following assumptions:

- Average length of stay per visitor is 2.3 nights;
- Average of 3 visitors per room; and
- Average room occupancy of 60% across the year.

This is based on data sourced from TRA National Visitor Survey, AirDNA and ABS Survey of Tourist Accommodation.

Based on this analysis, additional accommodation needs for the Central Coast to meet current visitor demand for commercial accommodation is between **1,285 and 3,854 rooms**.

It is assumed that the **high scenario of 3,854 rooms** provides the most accurate reflection of accommodation needs in the Central Coast, as there is a critical lack of quality contemporary accommodation stock and a significant shortfall when compared to the supply of commercial accommodation at competing destinations. This assessment also does not take into account future accommodation demand.

T4. CURRENT ACCOMMODATION NEEDS

Scenario	Low	Mid	High
Growth in commercial accommodation to meet benchmarks	6%	12%	18%
Visitors staying in paid accommodation	113,248	226,497	339,745
Visitor nights	260,471	520,943	781,414
Room nights	781,414	1,562,828	2,344,241
Rooms	2,141	4,282	6,423
Supportable Rooms (at 60% occupancy)	1,285	2,569	3,854

Opportunities for accommodation investment:

Based on the gaps identified in accommodation and the projected accommodation needs in the region, below is an overview of specific accommodation typologies that may be supported in the region to meet the needs of current and target visitor markets.

- Luxury Hotels / Resorts
- Midscale Resorts
- Boutique Hotels
- Midscale Hotels
- Holiday Parks
- Self-contained houses/units/apartments
- Serviced apartments
- Experiential Accommodation (e.g. glamping and tiny cabins)

Accommodation is required at all destinations across the Central Coast to support growth and meet current capacity constraints. Key destinations that should be prioritised for accommodation development include Gosford and the Hinterland.

Reinvestment in existing building stock in town centre and in proximity to key visitor destinations should be prioritised. The Beachcomber Hotel and Resort, Toukley, is an example of an existing accommodation facility that has been successfully reinvested in to meet the standards and expectations of the current visitor market.

Transport and Access

The Central Coast is well-connected by road and rail to Sydney and Newcastle, with passenger train journeys of two to three hours and drive time of an hour via the Pacific Motorway.

However, the Central Coast itself is poorly connected within, with a lack of road, trail and public transport links between the Coast and hinterland, as well as poor public transport and trails infrastructure along the Coast. This limits the ability to disperse visitors across the Coast, and also hinders the development of a night time economy.

The Central Coast is well-positioned for the intrastate visitor economy growth due to its location in close proximity to Sydney and Newcastle. The Pacific Highway dissects the Central Coast and provides a major opportunity to leverage Sydney, Melbourne, Canberra and Brisbane visitors undertaking the Coastal drive.

Sydney and Newcastle provide the closest passenger airport access to the Central Coast, which are an hour and a half drive from most of the Central Coast. This makes it difficult to attract interstate and international visitors to the Coast.

Opportunities for transport and access investment:

- Public transport investment, particularly between the coast and hinterland, and towns on the coast.
- Opportunity to further develop touring routes that connect the coast and hinterland
- Provide public facilities, amenities, lighting and public infrastructure to ensure continued delivery of high amenity public spaces.
- Delivery of improved walking trails, pathways, and cycling routes to maximise access and provide a diverse offering of experiences.

Towns, Infrastructure and Amenity

Gosford is the primary urban area of the Central Coast, providing a hub for business, retail and visitor services. The city has undergone significant reinvestment and revitalisation in the last few years to upgrade building stock, infrastructure and public amenity to become a premier regional city.

Wyong provides a high amenity town in the North Coast, which is emerging as an activated arts and culture destination, layered with historic fabric as an old dairy town.

Key tourist destinations of Terrigal and Avoca Beach have vibrant coastal high streets with boutique retail and a range of restaurants and bars. The North Coast has smaller and less developed town centres and retail precincts, such as Toukley.

There is opportunity to diversify and improve the quality of retail and town centre precincts across the Central Coast. A key factor in enhancing town amenity is building stock quality and reinvestment in buildings.

There is further opportunity to develop town narratives and further promote the unique selling propositions of each town. At a surface level, the North and South Coast sub-regions provide a largely homogenous experience centred around beaches and high streets. There is a need to promote the unique qualities of each town to visitors to encourage visitor dispersal and build the brand, such as the unique character of Long Jetty boutiques and vintage shops.

Opportunities for town, infrastructure and amenity investment:

- Investment in township activation programs such as infrastructure and pathways to enhance town amenity.
- Encourage development of a vibrant night-time economy.
- Promote town narratives and demonstrate a unique profile of towns through the Love Central Coast website.

5. BRAND AND MARKETING

5.1. BRAND

Council has recently developed and launched a new Destination Brand, 'Love Central Coast'.

It is an overarching brand targeted to the following audiences; Local community, Visitors (including VFR), Local businesses and Potential residents.

Whilst significant work has been undertaken to build a brand story, as demonstrated in the adjacent brand framework, the Central Coast still has a way to go in building brand identity and awareness in target markets.

To date, the Central Coast has struggled to identify and promote a unique selling proposition (USP), other than proximity to Sydney and nature-based experiences.

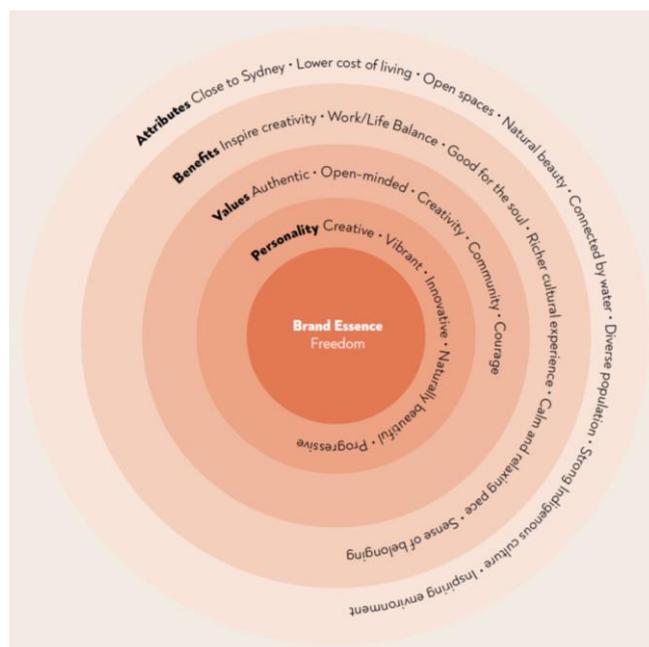
The combination of coast and hinterland experiences in one destination within an hour from Sydney is a USP that can be capitalised on with targeted investment in the hinterland and promotion.

In addition, engagement with the tourism industry highlighted that there is a need to familiarise industry with the brand, Council's branding and marketing activities, and the application of brand materials. The development of an industry brand toolkit, and industry famil activities, will assist in encouraging local industry to utilise and reinforce the brand.

F7. LOVE CENTRAL COAST LOGO



F8. CENTRAL COAST BRAND FRAMEWORK



5.2. VISITOR SERVICING

Digital Visitor Servicing

Council operates the Love Central Coast destination website and the Love Central Coast social media accounts.

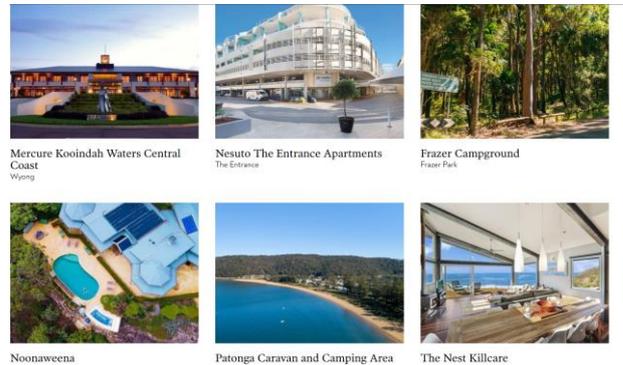
The website is attractive and high amenity, utilising the destination brand. The website allows for exploration of town centres through neighbourhood guides and includes an overview of where to stay, eat and drink, and activities to undertake.

Key areas for website improvement include:

- Lack of focus on unique and potential hero attractions.
- Lack of hierarchy in content.
- Does not promote visitor dispersal through use of multi-destination touring routes.
- Lack of themed touring routes such as foodie trails.
- Poor promotion of nature-based assets, particularly walking and cycling experiences.
- Difficulty in locating calls to action, which impacts on conversion to booking.

A review of the website is required to ensure it promotes potential hero attractions, provides appropriate hierarchy, promotes visitor dispersal, uses highly inspiring and motivating imagery, and allows for easy conversion into a booking.

F9. EXAMPLE - ACCOMMODATION LISTINGS ON LOVE CENTRAL COAST



F10. PRECEDENT – VISIT GEELONG AND BELLARINE TOURISM



Physical Visitor Information

Central Coast Council is responsible for physical visitor information servicing, through operation of a Visitor Information Centre (VIC) and provision of physical collateral such as brochures, guides, maps and signage.

Council is in the process of developing a Love Central Coast official visitor guide, as well as Town Centre Guides, which includes development of printed and digital guides for 12 town centres. There is a need for regional maps to support increased touring and visitor dispersal across the region.

There is one certified Visitor Information Centre (VIC) in the Central Coast region, located at Memorial Park at The Entrance. The centre is open from Tuesday to Saturday from 10am to 4pm.

Council is currently reinvesting in the visitor information centre on its existing site to develop it into a contemporary and interactive facility, which will provide the ability to create tailored Eat, Stay and Play itineraries. The redeveloped VIC will include modern public facilities, adult accessible change space, accessible ramps, improved outdoor public spaces, a dedicated local produce sales and showcase space, a bookable function area for small-scale events and a purpose-built accessible green room and backstage office area to support the existing Memorial Park stage and performers.

The Central Coast is an extensive region that cannot be adequately serviced with one location for visitor information. The majority of visitors are to Gosford and South Coast, in particular Terrigal and Bouddi National Park.

Additional visitor information centres are not recommended, as they are not aligned to current visitor information consumption preferences and incur high operating costs for little benefit. However, there is a need to review and implement Council's Visitor Information Services Plan to ensure physical visitor information is provided at strategic locations (including official guides and brochures), and to ensure delivery of high quality digital signage and improved digital content and marketing.

F11. THE ENTRANCE VIC – CURRENT AND PROPOSED FACILITIES



Source: Visit NSW, 2021



Source: Central Coast Council, 2021

Signage and Gateways

The visitor currently has a fragmented and unclear experience of the Central Coast brand whilst in the region.

Wayfinding signage across the Central Coast includes a range of outdated signage in different styles, colours and formats, as well as poor directional signage.

The Central Coast Wayfinding Strategy 2020 was recently prepared by Council, which will provide direction for investment in wayfinding signage.

The region lacks gateway signage to demarcate entrance into the Central Coast. Whilst the adjacent 'Welcome to the Central Coast' signage has been proposed for entry locations to the Council area, there is opportunity to deliver larger scale, sculptural gateway interventions that will assist with positioning and branding the Central Coast.

There is opportunity to use local artists to create an iconic entry sculpture upon entrance to the Central Coast from the South and North. Potential locations may include Mooney Mooney and Bushells Ridge. This will capitalise on the volume of visitors travelling on the Pacific Motorway daily, support increased brand awareness and repositioning of the Central Coast brand within the market.

F12. PROPOSED VEHICULAR GATEWAY SIGNAGE



Source: Central Coast Wayfinding Strategy, 2020.

F13. PRECEDENTS



Source: Futago, 2021.



Source: The Guardian, 2021.



Part B

Destination Management Plan Framework

6. STRATEGIC CONSIDERATIONS

6.1. DESTINATION BRAND AND POSITIONING

Market Opportunity

The visitation patterns for Central Coast highlight a predominance of daytrip visitors primarily from Sydney. Analysis of expenditure data shows that the yield from visitors to the Central Coast is low compared to similar destinations.

The Destination Management Plan needs to consider ways to create a more sustainable destination which focuses on yield. The benefits of focusing on yield result in greater economic benefit to Central Coast. Dispersal of visitors from coastal areas to the Hinterland will also support growing visitor yield and add to visitor experience.

The Central Coast should consider the following to establish itself as a sustainable visitor destination:

- Focus on high yield markets from Sydney;
- Promote hinterland products and experiences;
- Promote and enhance Central Coast villages and townships;
- Promotion as an overnight wellness and escape destination;
- Investigate international market opportunities longer term.

Marketing Hierarchy and Promoting Hero Assets

Central Coast Council have invested in a number of marketing assets in recent years including a destination brand, website and social media handle for Instagram and Facebook.

The region receives substantial annual visitation of more the 6 million visitors, the vast majority of these are day-trippers sourced from Sydney. The quality of nature based assets, beaches, estuaries and tourism assets position Central Coast as an overnight holiday destination. Anecdotally, however it does not have the same level of awareness as other coastal destinations with similar scale and quality of tourism assets.

Continued development of the Central Coast brand and improved awareness in key markets should be a future focus for marketing, this may be achieved by identifying and promoting hero assets. Key hero assets potentially include Bouddi National Park, Brisbane Waters National Park and Munmorah State Conservation Area.

In addition to this the hinterland area of Central Coast has comparatively low visitation and low awareness. Further effort needs to be focused towards improving awareness of the products and experiences within the Central Coast Hinterland.

Specific considerations for marketing include:

- Website enhancement – cross promotion and linkages with other websites which may have more content on specific topics.
- Improved signage – review and implement the Wayfinding Signage Strategy.
- Strengthen the gateways of Central Coast to mark entry and exit to the region using gateway interventions such as sculpture and or landscaping.
- Community awareness program – promote the tourism assets and experiences to residents to promote to visiting friends and relatives market.

Wellness Positioning

The Central Coast is an emerging health and wellness destination, the elements that contribute to the holistic definition of personal wellness are at heart of the Central Coast experience. These include:

- **Physical wellness** – exercise and outdoor activities are key to the offer of the Central Coast including surfing, swimming, walking, cycling.
- **Emotional wellness** – escape to nature, rest and relaxation is a key motivator or visit to the Central Coast.
- **Environmental wellness** – awareness of the role we play in improving our natural environment rather than denigrating it and maintaining and living in a healthy physical environment promotes wellness, the Central Coast's focus on eco-tourism certification is excellent positioning for this.
- **Social wellness** – The Central Coast is a place of gathering with friends and family, social experiences are one of the key activities, particularly visiting friends and family on the Coast.
- **Spiritual wellness** – The Central Coast's nature based assets and relaxed culture are well suited to spiritual wellness, the offering of spas, arts and culture product contributes to spiritual wellness.

Wellness should be explored in the messaging of the Central Coast, its close proximity to Sydney offers a short wellness escape.

Build town narratives and promote unique selling propositions

The Central Coast is made up of a collection of small towns and villages. Each with their own community, unique landscape, beaches or hinterland outlook. The towns and villages of the Central Coast form one of the key visitor experiences.

There is opportunity to strengthen the layers of experience of the Central Coast by building the narratives and unique selling propositions for key tourist townships and furthermore continue to revitalise, beautify and activate townships so they are vibrant and attractive to visitors.

An Export Ready Region

Central Coast has opportunity to leverage further from its proximity to Sydney and international touring visitors travelling north along the Pacific Highway. A number of attractions within Central Coast already target international markets, however the natural assets and beaches are also positioned well to capture international experience seekers.

The Central Coast should consider ways to facilitate the development of export ready product to internationally brand the region. This includes promotion of hero products and packaging of touring experiences.

Night Time Economy Activation and Support

Some of the Central Coast's key centres have potential to strengthen as entertainment precincts and their role in the night time economy. Stakeholders consulted through development of the Destination Management Plan highlighted the need to increase the level of night time activation and vibrancy in key destinations.

Gosford - A Strong Regional Centre

Gosford is the regional centre of the Central Coast, however it has lagged behind other cities such as Newcastle and Wollongong in the development of its role as a regional hub and visitor destination. Gosford is now undergoing transformation with investment by Government in placemaking projects such as foreshore improvements as well as substantial investment by the private sector in visitor accommodation.

Gosford has the potential to increase its role in events, arts, culture, business and entertainment. This will allow it to develop its visitor economy and attract high yielding visitors. Newcastle and Geelong present excellent examples of cities which have successfully developed their visitor economies through investment in arts, culture and events.

Another key project for Gosford is Government support for the establishment of a 7000 student university campus in Gosford. The project is in its early stages, however once operational is likely to have a significant impact on the economy in Gosford and support the visitor economy through the workforce growth and attraction of international and interstate students and their visiting family.

6.2. PRODUCTS, EXPERIENCES AND ATTRACTIONS

The Central Coast hinterland has significant potential to drive the Central Coast visitor economy. There are a number of attractions, products and experiences that exist in the hinterland, however there is a need for further investment in accommodation to support the events sector and drive overnight visitation.

Furthermore, consideration should be given to the development of touring routes leveraging from existing touring between Sydney, Brisbane and Northern NSW.

Eco Destination Certification

In line with the Central Coast's Eco Destination Certification journey, the Destination Management Plan will also consider UNWTO's Sustainable Tourism Development guidelines. Sustainable tourism development is defined by UNWTO as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".

Waterway Activation

Central Coast is well regarded for its coast and beaches, however the region's estuaries and waterways also present significant opportunity for tourism product development and activation.

Assets such as Brisbane Water, Kincumber Broadwater, Tuggerah Lake and Wyong River can be further activated to promote greater use and drive visitation. This includes implementation of infrastructure projects such as waterway access, tour opportunities and further supporting private cruising of the waterways.

It is critical that waterway health is addressed to ensure these assets can be enjoyed by future generations.

Trail Enhancement

One of the most popular activities by visitors to Central Coast is walking. Bushland areas such as Bouddi National Park as well as coastal walking tracks are popular with visitors. The Terrigal boardwalk is an iconic coastal walk connection and there is further opportunity to link various segments of coastal walking trails along the length of the Central Coast.

In addition to trail enhancement on the coast, there is further opportunity to develop trails around the lake and river systems within the Central Coast.

Mountain Biking and Shared Pathways

A recent feasibility study into mountain biking commissioned by Central Coast Council has identified a substantial number of informal mountain bike trails. The study also identifies substantial demand for mountain biking on the Central Coast for residents and visitors.

There is a lack of formalised mountain bike single track in the region, despite the market potential. The feasibility study recommends the preparation of a mountain bike strategy which will identify the mountain bike trails that can be formalised and what further investment is needed to support mountain biking on the Central Coast.

There is opportunity to improve and grow the shared pathway network across the Central Coast. This will support the visitor economy and act as a drawcard for residents, tourists and visitors to the Central Coast.

There is opportunity to extend or create additional shared pathways as identified in the Central Coast Bike Plan, including the signature Magenta Shores Shared Pathway. Shared pathways would complement and provide access to identified eco and waterway tourism opportunities, and support opportunities for private bike hire operators.

Building the "Foodie" Brand

Leading coastal destinations in Australia such as Byron Bay, Sunshine Coast and Mornington Peninsula are supported by extensive food, beverage and farmgate product. Some of the issues identified in the Central Coast through consultation in relation to the provision of food related product include:

- Low awareness of farmgate products and high-quality food experiences available in the hinterland;
- There is a need to improve high quality dining options, particularly in coastal towns. Further to this further diversification of the cuisine offer is seen as important.
- There is a need to develop 'visitor ready' food experiences, particularly in the hinterland

Promotion of emerging food businesses and promotion of product development opportunities should be considered. In addition, the Central Coast should continue its support of and partnership with the Central Coast Food Alliance to build a strong local food industry.

Oyster and Pearl Farming

The Central Coast oyster and pearl farming industry is a unique experience that has export ready potential. There is opportunity to develop further branding and promotion around Central Coast's oyster industry.

This has strong alignment with the Central Coast's potential positioning as an eco-tourism lifestyle destination providing high quality produce.

Aboriginal Tourism

The Central Coast has one of the greatest number of significant aboriginal heritage sites of any Local Government Area in Australia. The sites are unique and important in the context of indigenous art and culture, an example is the Bulgandry man carving.

Dreamtime stories of the land also present opportunity for Central Coast Traditional Owners.

The Destination Management Plan should support capacity building and development of indigenous heritage tourism. Opportunities include:

- Camping on country – staying with Elders who can share the dreamtime stories;
- Cultural tours on waterways and estuaries by canoe or other vessels;
- Interpretation of heritage sites and guided tours.

Arts and Culture Infrastructure

To support a layered experience of the region, continued investment in arts and cultural assets should be considered. In key locations such as Gosford, this presents significant opportunity to revitalise the region.

6.3. EVENTS

Lack of Supporting Infrastructure for Events

Within the Central Coast there is a lack of event facilities to support large-scale events, including indoor venues (music, performing arts, MICE) and designated outdoor events spaces. Investment needs in event infrastructure include:

- Business conferencing venues;
- Large indoor exhibition and event spaces;
- Infrastructure to support outdoor events of scale (i.e. toilets, parking, sewer, electricity).

Developing Signature Events

There are existing events such as the Harvest Festival which have significant potential to become well recognised signature events. Identification and development of a calendar of events that are high profile, align to the product strengths of the Central Coast and attract high-yielding visitors should be supported.

Utilising Events to Promote Visitor Dispersal

There is opportunity to promote seasonal and geographic dispersal of visitors across the Central Coast through the establishment of and support for events and festivals. This may include multi-day and multi-destination events, as well as midweek and off-peak season events.

Growing Sports Events

Sporting events including professional and non-professional events should be considered for Central Coast. The Central Coast Mariners provide an example of a professional sports team that has a major impact on the visitor economy when playing home games. Professional sports clubs also create awareness and strengthen the brand of the Central Coast.

The Central Coast has excellent sporting facilities and nature-based assets that can support non-professional events. This includes beaches to support iron man events and surfing carnivals, as well as structured sports in the region's recreation facilities such as basketball and tennis tournaments.

6.4. INFRASTRUCTURE AND ACCESSIBILITY

Large-Scale Accommodation

There is a lack of luxury and premium/boutique accommodation facilities on the Central Coast. A majority of the hotel stock on the Central Coast includes standard/mid-scale hotels and motel/motor inns.

The Central Coast has exhibited significant growth in visitation and this is likely to continue. An increase in accommodation stock is needed to support future demand and current shortfall in supply.

Accommodation opportunities include:

- Luxury Hotels / Resorts
- Midscale Resorts
- Boutique Hotels
- Midscale Hotels
- Holiday Parks
- Self-contained houses/units/apartments
- Serviced apartments
- Experiential Accommodation (e.g. glamping and tiny cabins)

Public Transport Connectivity

Public transport connectivity, along the coastal corridor and between coast and hinterland was identified as an issue by stakeholders. Improvement to public transport is not only important to support visitor movement but also to support workers transport requirements in an industry that is reliant on younger labour that may not have access to a vehicle.

Accessibility and Inclusion

The accessible tourism market is a growing tourism market segment that could be serviced on the Central Coast.

Business and community training are required to develop and promote the Central Coast as an accessible community and holiday destination for those with disabilities and to embrace all visitors and enhance their revenues.

6.5. INDUSTRY DEVELOPMENT

Strengthening Awareness of Council Role

Consultation with industry highlighted a lack of understanding and awareness of Council's new tourism model and the work that Council is undertaking to support the visitor economy. Further enhancement and delivery of improved communication with industry will improve Council's relationship with the tourism sector.

Council funds an Industry Services contractor, who is already making ground in terms of improved industry communication and collaboration.

Staff Training and Workforce Development

Stakeholders have identified that poor customer service as an ongoing issue across the region and there is a need for workforce development and capacity building. Whilst some of this relates to formal training it is also in part due to the tourism and hospitality sector not perceived by many as a career pathway. The tourism industry, Council and training providers need to work together to address workforce and training issues. Some considerations include:

- The need to train the tourism workforce in skills aligned with 21st century needs: the needs of industry need to be reflected in the training opportunities provided locally.
- Show youth there is a career path in the visitor economy – its not just hospitality and there is career progression available;
- Promotion of existing training courses including the Cert II in Hospitality which is operated by the Leagues Club in Gosford and also the Ourimbah Campus.

7. STRATEGIC FRAMEWORK

7.1. VISION

From headland to hinterland, a thriving, connected and supported industry will provide compelling visitor experiences that position the Central Coast as a premier sustainable tourism and lifestyle destination.

7.2. OVERARCHING OBJECTIVES

- Support investment in the visitor economy that positions the Central Coast an attractive place to live, work and play.
- Generate sustainable visitation patterns by increasing visitor dispersal and growing off-peak visitation.
- Grow visitor yield through product packaging, increasing length of stay and growing overnight visitation.
- Leverage the diverse experience offering to increase brand awareness in target markets and rewrite the Central Coast narrative.
- Build a cohesive and recognised brand that promotes an understanding of the region from hinterland to headland.
- Create high amenity, vibrant and activated towns, leveraging unique selling propositions to build town narratives.
- Continue to develop Central Coast as a leisure and business events destination through strategic partnerships.
- Attract investment in enabling infrastructure that will facilitate visitor economy growth.
- Encourage sustainable tourism and eco-tourism development that supports and leverages Eco Destination Certification.
- Empower a unified, connected and supported industry.

7.3. PERFORMANCE TARGETS

The following performance targets have been identified for Central Coast:

1. 10% growth in overnight visitors to Central Coast by 2025.
2. 15% increase in visitor expenditure.
3. 20% increase in visitation to Central Coast Hinterland by 2025.

7.4. THEMES

Key themes to guide future investment have been identified, in response to strategic considerations and objectives for tourism development.

Project opportunities have been identified in Section 8, aligned to the tourism development themes. This includes both priority projects and other project opportunities.

T5. THEMES FOR INVESTMENT

Theme	Focus
1 Identity, Awareness and Placemaking	Building a strong brand identity to ensure the Central Coast is recognised as a premium and compelling holiday destination. Creating rich and active places across the seasons, a vibrant night-time economy and a sense of place will rewrite the Central Coast narrative.
2 Eco Destination, Nature, Water and Trails	Celebrating the unique coastal and hinterland environment through product development and supporting infrastructure, facilities and services to create unparalleled and motivating nature-based and wellness experiences.
3 Produce, Creators and Culture	Showcasing diverse local narratives and telling the stories of the Coast's makers and creators, the abundant natural produce, and the layers of culture and heritage.
4 Events, Festivals and Conferencing	Delivering signature events aligned to the region's comparative strengths, utilising the regions natural assets to build a strong events brand and growing the business and conferencing events sector to develop a robust and sustainable year-round visitor economy.
5 Enabling Infrastructure	Developing strong foundations for visitor economy growth through infrastructure, transport connections, accommodation, accessible destinations and visitor services that support a thriving CentralCoast.
6 Industry Development and Collaboration	Empowering and supporting industry development through engagement, collaboration, training and enhanced connection to create a resilient and visitor ready industry across the Central Coast.

8. PROJECTS AND ACTIONS

8.1. INTRODUCTION

Action plans have been prepared to guide delivery of projects under each theme. The following provides a guide for interpreting the action plans.

Priority Projects

In order to identify priorities, each project has been assessed against the overarching objectives. Projects that best meet these objectives and address critical issues or opportunities for the Central Coast have been prioritised above others.

Projects have been identified using the following priority levels:

- Short-term (within 1 year)
- Medium term (1-3 years)
- Long-term (4 years +)

Costs identified are estimates only.

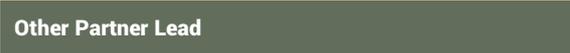
Delivery Responsibility

Stakeholder roles have been identified for each action, including both the leading stakeholder and the supporting/enabling stakeholders. The key below demonstrates the delivery leads.

It is intended that Council may be required to initiate a number of identified projects and lead their direction, however initiatives may be delivered in partnership with industry and State Government.

Additionally, a range of strategic planning projects have been identified that would support growth in the visitor economy, which should be led by Council and may require additional Government funding.

T6. DELIVERY LEAD KEY

	Central Coast Council Lead
	Industry Lead
	Other Partner Lead

Grant Opportunities

Grant opportunities have been identified where applicable, for both Central Coast Council and Industry. These are demonstrated in the action plans using the symbols below.

T7. DELIVERY LEAD KEY

	Central Coast Council Lead
	Industry Lead

8.2. THEME 1 IDENTITY, AWARENESS AND PLACEMAKING

THEME 1 OVERVIEW

Central Coast has one of the largest daytrip markets in Australia, with 5.6 million day-trippers attracted to the region in 2019. In order to grow the reputation of Central Coast as an overnight holiday leisure destination focus needs to be made on building the identity of the Central Coast, its towns, villages and hinterland. In addition to this the establishment of specific marketing programs that link to place will increase awareness and motivate visitation.

This theme focuses on building a strong brand identity to ensure the Central Coast is recognised as a premium and compelling holiday destination. Creating rich and active places across the seasons, a vibrant night-time economy and a sense of place will rewrite the Central Coast narrative.

PRIORITY PROJECTS

Central Coast Township Revitalisation Project

Central Coast should consider delivering a township revitalisation project that improves public amenity and streetscaping in townships, develops township brand narratives, activates spaces and encourages improved urban design outcomes.

Night Time Activations and Enhancements

Central Coast should encourage night time activation in key night time economy precincts. This should also be supported by encouraging outdoor dining through streetscape design improvements and interventions. Phillip Lane in Parramatta presents an example of a laneway intervention.

Seasons of Central Coast Marketing Campaign

In order to strengthen seasonal dispersal and highlight the variety of things to do in Central Coast across the year, a seasonal marketing campaign which focuses on seasonal produce, activities and events should be established.

Coast to Country Touring Itineraries

The link between the coastal areas of Central Coast and the hinterland can be strengthened by the establishment of touring itineraries that encourage coastal visitors to travel inland to the experience the hinterland.

T8. THEME 1 ACTION PLAN

Project	Actions	Stakeholder Role		Cost Est.	Priority	Grant Opportunity
		Lead	Support / Enable			
Central Coast Township Revitalisation Project	<ul style="list-style-type: none"> Identify towns of the Central Coast that are in need of amenity improvements that will strengthen their appeal to the visitor economy. Undertake a Central Coast Tourism Township Townships Streetscape and Foreshore Masterplan for identified towns. 	Council	Industry Chambers of Commerce	\$200K	Medium	✓ ✓
Coast to Country touring itineraries	<ul style="list-style-type: none"> Identify possible touring itineraries that link coastal destinations with hinterland product. Develop and promote itineraries on Love Central Coast website. 	Council	DNSW / DSSN		Short	
Seasons of Central Coast Marketing Campaign.	<ul style="list-style-type: none"> Work with a marketing agency to develop a Seasons of Central Coast marketing campaign. Deliver the campaign over a two year period 	Council	DNSW / DSSN Industry	\$50K	Short	
Gateway interventions at Mooney Mooney and Bushells Ridge	<ul style="list-style-type: none"> Undertake a feasibility study and concept design for gateway interventions for the Central Coast. This will consider prioritising sites followed by concept design. 	Council	Local artists	\$100K	Medium	✓
Night-time activations and enhancements	<ul style="list-style-type: none"> Undertake a night-time activation and enhancement strategy which identifies intervention concepts for night time economy precincts, understanding barriers to night time activity (including zoning, compliance). 	Council	Chambers of Commerce Industry	\$80K	Medium	
VFR marketing campaign (discover your own backyard)	<ul style="list-style-type: none"> Develop a discover your own backyard campaign for Central Coast locals. This should include social media campaign linking with community Facebook pages, use of Instagram to promote the region's assets. 	Council	Industry	\$20K p.a	Ongoing	
Local ambassador program	<ul style="list-style-type: none"> Continue to use local ambassadors to promote local products and destinations. 	Council	Industry	\$20K p.a	Ongoing	
Sydney marketing program - 'An escape on your doorstep'	<ul style="list-style-type: none"> Develop targeted campaigns to Inner Sydney and North Western Sydney to escape to the Central Coast. 	Council	DNSW	\$50K p.a	Ongoing	✓
Product packaging	<ul style="list-style-type: none"> Work with Hinterland and Coastal attractions businesses to package products to domestic and international markets. 	Industry	Central Coast Council		Short-Medium	✓ ✓

*All items in action plan are dependent on funding availability.

8.3. THEME 2 ECO DESTINATION, NATURE, WATER AND TRAILS

THEME 2 OVERVIEW

Central Coast is highly regarded for its natural amenity including impressive beaches, coastline, estuaries and hinterland. It has some of the most significant aboriginal heritage sites in Australia and is working towards ECO Destination Certification. Nature based tourism is and will continue to be a major driver of visitation.

This Destination Management Plan identifies projects that unique coastal and hinterland environment through product development and supporting infrastructure, facilities and services to create unparalleled and motivating nature-based and wellness experiences.

PRIORITY PROJECTS

Waterway tourism activation strategy

Assets such as Brisbane Water, Kincumber Broadwater, Tuggerah Lake and Wyong River can be further activated to promote greater use and drive visitation. This includes consideration of lakefront assets, private sector investment, moorings, waterway access and infrastructure, cruising, and tours. An activation strategy which identifies product and infrastructure needs will support the enhancement of these assets.

Darkinjung Waterway Tour and Overnight Camping experience

In order to leverage from the significant cultural heritage of the Central Coast Darkinjung Aboriginal Land Council are considering the development of a water and land based overnight cultural heritage tour. This tour, if adequately supported, could be developed as a signature experience within the Central Coast.

Develop a signature water based 'eco-tourism' experience/s that strengthens brand identity

Central Coast Council should promote and support the establishment of water based eco-tourism products and experiences, particularly those that are unique and have potential in attracting interstate and international markets. There is opportunity for this to incorporate local seafood in the experience.

The Central Coast has potential to draw visitors from Sydney and beyond to experience eco-tourism products and experiences.

T9. THEME 2 ACTION PLAN

Project	Actions	Stakeholder Role		Cost Est.	Priority	Grant Opportunity
		Lead	Support / Enable			
Waterway tourism activation strategy	<ul style="list-style-type: none"> Undertake a masterplan and activation plan for the Central Coast's key estuaries including Brisbane Water, Kincumber Broadwater, Tuggerah Lake and Budgewoi Lake. 	Council	NSW Parks and Wildlife	\$150K	Medium	
Darkinjung Waterway Tour and Overnight Camping Experience	<ul style="list-style-type: none"> Support Darkinjung in the development of an indigenous cultural experience. Undertake a feasibility study and business plan for the establishment of the experience. 	Darkinjung Traditional Owners	Central Coast Council NSW Parks and Wildlife		Short-Medium	✓
Develop a Signature Water Based 'Eco-Tourism' Experience/s that Strengthens Brand Identity	<ul style="list-style-type: none"> Promote the opportunity to establish a signature water based eco tourism experience that includes linkages with seafood. 	Industry	Central Coast Council		Medium	✓
Undertake a mountain biking strategy for Central Coast which identifies opportunity for investment in mountain biking	<ul style="list-style-type: none"> Complete a mountain biking strategy drawing on the feasibility study for mountain biking recently completed. 	Council	DELWP NSW Parks and Wildlife	\$50K	Short	✓
Achieve recognition as a World Surfing Reserve	<ul style="list-style-type: none"> Complete registration to become a recognised world surfing reserve. Utilise the world surfing reserve status in marketing and online media. 	Council			Medium	
Develop a coastal nature trail from Frazer Park to The Entrance	<ul style="list-style-type: none"> Investigate the feasibility for a coastal trail linking Frazer Park with The Entrance. 	Council	NSW Parks and Wildlife		Medium	
Investment in walking trails and shared pathways	<ul style="list-style-type: none"> Working with Parks NSW and Wildlife support investment and promote short walks of the Central Coast. Delivery of shared pathway opportunities, including Point Clare to Gosford Railway Shared Path and the continuation of the Magenta Shared Path. 	Council	NSW Parks and Wildlife		Medium	✓

*All items in action plan are dependent on funding availability.

8.4. THEME 3 PRODUCE, CREATORS AND CULTURE

THEME 3 OVERVIEW

Central Coast has an emerging food, creative and arts sector. The yield from visitors that engage with food and arts is considerably higher than those visitors who solely engage with nature-based products. The Central Coast Hinterland is a highly productive agricultural area and there is much potential to link produce to plate in the region. Central Coast should showcase the diverse local narratives and telling the stories of the Coast's makers and creators, the abundant natural produce, and the layers of culture and heritage.

PRIORITY PROJECTS

Hinterland Agri-Tourism 'Visitor Ready' Program

Agri-tourism presents a significant opportunity for the Central Coast hinterland, however there are many businesses in their infancy and others that are considering farmgate or retail as additions to their enterprise.

There is a need, however to support existing agri-tourism and new agri-tourism businesses become visitor ready. Development of a program which allows larger existing agri-tourism businesses to share their knowledge, as well as a Council-led education session on planning requirements, will assist businesses to understand how they can become visitor ready.

Oyster 'Food Brand' and Supporting Product Development

Central Coast has a number of oyster producers, however there is a lack of awareness of oyster production on the Central Coast. The establishment of a Central Coast Oyster food brand would support visitor awareness of local produce and development of tourism product opportunities incorporating oysters.

Foodie Events Program

The development of an events program which focuses on food would enhance the linkages of local produce to market and help to create awareness around food opportunities on the Central Coast. Central Coast branded farmers markets and a visiting chef program could be considered as part of a foodie events program.

T10. THEME 3 ACTION PLAN

Project	Actions	Stakeholder Role			Priority	
		Lead	Support / Enable	Cost Est.		
Hinterland Agri-Tourism 'Visitor Ready' Program	<ul style="list-style-type: none"> Develop a visitor ready program with the support of DNSW. 	Council	DNSW		Medium	
Oyster 'Food Brand' and Supporting Product Development	<ul style="list-style-type: none"> Work with the Oyster industry to develop a regional Oyster brand and marketing plan to raise the awareness of the Oyster industry as a commodity. 	Oyster Industry	Central Coast Council		Short-Medium	✓
Foodie Events Program	<ul style="list-style-type: none"> Develop a foodie events program which promotes local produce, Central Coast branded farmers markets. 	Council	Central Coast Food Alliance	\$20K p.a	Medium	✓
Develop foodie itineraries, including expanding the Meet the Makers Trail	<ul style="list-style-type: none"> Audit and implement a food trail connecting hinterland and coast. 	Local food Industry	Central Coast Council		Short	✓
Support investment in distillery and brewery experiences in the hinterland	<ul style="list-style-type: none"> Promote enhancement and investment in hinterland destination brewery and distilleries. 	Industry	Central Coast Food Alliance Independent Brewers Associations Central Coast Council		Medium-Long	✓
Development of an arts and cultural precinct	<ul style="list-style-type: none"> Identify a potential location for development of a cultural precinct on the Central Coast 	Council			Long	✓

*All items in action plan are dependent on funding availability.

8.5. THEME 4 EVENTS, FESTIVALS AND CONFERENCING

THEME 4 OVERVIEW

Central Coast's proximity to Sydney, existing accommodation base and nature-based assets make it an ideal location to host events and festivals.

Delivering signature events aligned to the region's comparative strengths. utilising the regions natural assets to build a strong events brand and growing the business and conferencing events sector to develop a robust and sustainable year-round visitor economy.

PRIORITY PROJECTS

Develop Harvest Festival into Signature Event

The Harvest Festival is important to the Central Coast in that it brings focus to the Central Coast Hinterland, encourages dispersal of visitation and visitor yield. Stakeholders identified that some improvements to the festival are required, however it presents a significant opportunity.

Central Coast Stadium Precinct Masterplan

Develop a precinct masterplan to support development of the Stadium as a premier sporting destination.

As identified in the Central Coast Stadium Implementation Plan, the master plan is required to improve connectivity between the City and the Stadium, lead to better activation of event days, and enhance the overall event and non-event day experience of the Stadium.

Business Events Marketing and Attraction Action Plan

There is opportunity to develop the Central Coast as a business events destination, leveraging the close proximity to Sydney to support a range of business event types including conferences, meetings and other corporate events.

The development of a business events marketing and attraction action plan will allow Council and industry to attract new and additional events, and grow the region's offering.

T11. THEME 4 ACTION PLAN

Project	Actions	Stakeholder Role		Cost Est.	Priority	Grant Opportunity
		Lead	Support / Enable			
Develop concept of Harvest Festival	<ul style="list-style-type: none"> Prepare a business plan for the future development of the Harvest Festival in conjunction with industry, with the aim of shaping and enhancing the concept, and improve the event quality. 	Council	Hinterland industry		Short	
Investigate long-term opportunity for business events bureau	<ul style="list-style-type: none"> Following growth and investment in conferencing and accommodation, investigate the potential for a business and events bureau for Central Coast. 	Council	DNSW		Long	
Develop a business events marketing and attraction action plan	<ul style="list-style-type: none"> Undertake a business events marketing and attraction plan. 	Council	Business events and accommodation sector		Medium	
Food and produce events	<ul style="list-style-type: none"> Promote opportunities for food and produce events. 	Industry	Central Coast Council		Medium	✓
Investigate events transport services	<ul style="list-style-type: none"> Investigate opportunity for flexible transport initiatives to support events across Central Coast. 	Council	Transport for NSW		Long	
Events Review – review funding framework, resourcing and development application process to ensure support for tourism events	<ul style="list-style-type: none"> Undertake an internal review of events funding, resourcing and approach to events development for the tourism sector. 	Council		\$20K	Short-Medium	

*All items in action plan are dependent on funding availability.

8.6. THEME 5 ENABLING INFRASTRUCTURE

THEME 5 OVERVIEW

The Central Coast has a large and growing visitor economy, its proximity at the doorstep of Sydney will ensure that the Central Coast continues to be choice location for the daytrip and overnight visitor markets. There is a need to continue to invest in infrastructure, transport and visitor accommodation to support this growth.

The Central Coast will develop strong foundations for visitor economy growth through infrastructure, transport connections, accommodation and visitor services that support a thriving Central Coast.

PRIORITY PROJECT PROFILES

Connecting Central Coast - Public Transport Advocacy Project

There is a need to greatly improve transport connectivity in the Central Coast including links between coast to hinterland and along the coast – north to south. It is understood that a rapid transport system is being investigated. The solution will require Government support and it will be important Central Coast Council advocate for delivery of the transport system.

Accommodation Investment

Continued investment in visitor accommodation is needed to meet the shortfall of commercial accommodation supply when benchmarked with

other destinations in the order of 3,854 rooms currently. Additional rooms are also needed to meet future demand. Accommodation should meet contemporary market expectations and include:

- Boutique hotels
- Integrated luxury hotels/resorts (isolated, in proximity to town)
- Midscale hotel / resort accommodation
- High quality tourist parks (in high amenity tourist destinations)
- Experiential accommodation (glamping, eco-accommodation, water-based accommodation)
- Wellness retreats (isolated nature-based locations)

T12. THEME 5 ACTION PLAN

Project	Actions	Stakeholders		Cost Est.	Priority	Grant Opportunity
		Lead	Support / Enable			
Connecting Central Coast - Public Transport Advocacy Project.	<ul style="list-style-type: none"> Continue to support the connecting Central Coast public transport advocacy project. 	Transport for NSW	Central Coast Council		Short	✓
Accommodation Investment.	<ul style="list-style-type: none"> Undertake a detailed accommodation opportunities and investment study with supporting investment prospectus. 	Council		\$50K	Medium	
Implement carpark monitoring infrastructure.	<ul style="list-style-type: none"> Implement infrastructure in key visitor nodes to monitor and investigate carparking usage and the need for carparking expansion. 	Council		\$20K	Medium	
Visitor servicing improvements, including implementing wayfinding signage strategy, deliver visitor guides and regional maps, and reinvestment in The Entrance VIC.	<ul style="list-style-type: none"> Review visitor services plan and implement key actions including review of signage, physical information assets and distribution and collateral. 	Council		\$200K	Medium-Long	✓
Identify critical infrastructure needs and develop a Visitor Infrastructure Investment Plan.	<ul style="list-style-type: none"> Identify critical needs and opportunities for visitor economy infrastructure investment. Develop business cases for key infrastructure investment projects to attract State and Federal Government Funding. Identify funding programs to fund this investment. 	Council	State Government		Short / Medium	✓
Support Accessible Tourism Development	<ul style="list-style-type: none"> Identify key visitation locations and enable accessible tourism through facilities and infrastructure 	Council			Short / Medium	✓
Support RV touring	<ul style="list-style-type: none"> Identify investment required to support RV touring and visitation, including signage and dump points Undertake co-operative marketing with neighbouring Councils, the Pacific Drive and DNSW. 	Council	Neighbouring Councils Pacific Drive DNSW		Short / Medium	

*All items in action plan are dependent on funding availability.

8.7. THEME 6 INDUSTRY DEVELOPMENT AND COLLABORATION

THEME 6 OVERVIEW

Central Coast has a large tourism industry which supports visitation including accommodation, food, beverage and retail, tours, activities and attraction businesses. These operators are dispersed across a large Council area in various nodes, in coastal and hinterland areas. It is important that the industry is supported to meet visitor expectations and create a seamless visitor experience.

Central Coast will empower and support industry development through engagement, collaboration, training and enhanced connection to create a resilient and visitor ready industry across the Central Coast.

PRIORITY PROJECT PROFILES

Central Coast Tourism Excellence Program

There is a need to support the professionalism and service levels of tourism businesses in Central Coast. The delivery of a tourism excellence program which leads to improved customer service, visitor readiness and training of staff should be delivered by Central Coast in conjunction with local training providers.

Development Approval Business Concierge

Businesses have identified the need for the development approvals process to be more facilitative and streamlined. The establishment of a business concierge that supports businesses in the planning process should be established in Central Coast.

Business Networking and Communication

A series of networking and communication events that allow businesses to interact with each other and Council are needed to strengthen coordination of the tourism industry. This should consider:

- Quarterly tourism workshops to provide opportunity for industry input into Council activities
- Annual Central Coast Year in Review and Planning Session - Council present developments in last year, industry provides input into tourism planning for the next year

T13. THEME 6 ACTION PLAN

Project	Actions	Stakeholder Role		Cost Est.	Priority	Grant Opportunity
		Lead	Support / Enable			
Central Coast Tourism Excellence Program	<ul style="list-style-type: none"> Development of an tourism industry excellence program in conjunction with DNSW, focusing on customer experience improvement and development of 'visitor ready' businesses. Industry to drive and promote program. 	<p>Council</p> <p>Industry</p>	DNSW	\$30K p.a	Short / Medium	
Development Approval Business Concierge	<ul style="list-style-type: none"> Investigate the delivery of a development approval concierge to support businesses in the development approvals process. 	Council		\$120k p.a	Medium-Long	
Business Networking and Communication	<ul style="list-style-type: none"> Quarterly tourism workshops to provide opportunity for industry input into Council activities. Annual Central Coast Year in Review and Planning Session. 	Council	Industry	\$10k p.a	Short	
Promotion of education pathways – utilising Gosford Education Precinct	<ul style="list-style-type: none"> Work with the education and training sector and industry to ensure linkages exist between training providers and businesses. 	Training Providers	Central Coast Council		Short-Medium	
Build industry tools and resources, including industry toolkit	<ul style="list-style-type: none"> Provide Destination Central Coast assets and branding to be used by industry including Love Central Coast guidelines and image library. 	Council			Short	
Industry Famils to boost industry awareness of local offering	<ul style="list-style-type: none"> Undertake half yearly famils for industry to discover products, assets and activities offered throughout Central Coast. 	Council	Industry	\$5K p.a	Medium	
Business export ready program promotion	<ul style="list-style-type: none"> Support businesses to become export ready through promotion of programs offered by DNSW. 	DNSW	Central Coast Council Industry		Medium	<p>✓</p> <p>✓</p>

*All items in action plan are dependent on funding availability.

APPENDIX A DOCUMENTS REVIEWED

Federal Level

- Tourism 2020 Strategy; and
- A National Business Events Strategy for Australia 2020.

State Level

- NSW Visitor Economy Strategy 2030;
- NSW Statewide Destination Management Plan 2019;
- NSW Visitor Economy Industry Action Plan 2030;
- Destination NSW China Tourism Strategy 2012-2020;
- The NSW Regional Conference Strategy and Action Plan 2017-2021;
- Aboriginal Tourism Action Plan 2017-2020;
- NSW Food and Wine Tourism Strategy and Action Plan 2018-2022.

Regional Level

- Central Coast and Lake Macquarie Regional Economic Development Strategy 2018-2022;
- Central Coast Regional Plan 2036;
- Destination Sydney Surrounds North Destination Management Plan 2018- 2020;
- Destination Sydney Surrounds North International Strategy.

Local Level – Council Strategies / Plans

- Central Coast Bike Plan 2019-2029
- Central Coast Council Long Term: Economic Development Strategy 2020–2040;
- Central Coast Council Parking Study and Implementation Plan
- Central Coast Destination Brand Framework;
- Central Coast Destination Management Plan 2018;
- Central Coast Eco and Rural Tourism Feasibility Study
- Central Coast Economic Recovery and Resilience Framework 2020;
- Central Coast Green Grid Plan
- Central Coast Kayaking and Canoeing report
- Central Coast Regional Economic Development and Employment Strategy;
- Central Coast RV Feasibility Report
- Central Coast Tourism Opportunity Plan 2019-2024;
- Central Coast Wayfinding Strategy
- Interim Darkinjung Development Delivery Plan 2019
- Mount Ettalong Master Plan
- One Central Coast, Community Strategic Plan 2018-2028
- The Central Coast Cultural Plan 2020-2025

