



Central Coast Destination Management Plan 2018 - 2021

FINAL REPORT

November 2017



THE PLAN AT A GLANCE

The purpose of this Destination Management Plan for the Central Coast is to guide tourism development and destination management for the next five years; to help ensure the long-term viability and sustainability of this vital sector for the Central Coast economy.

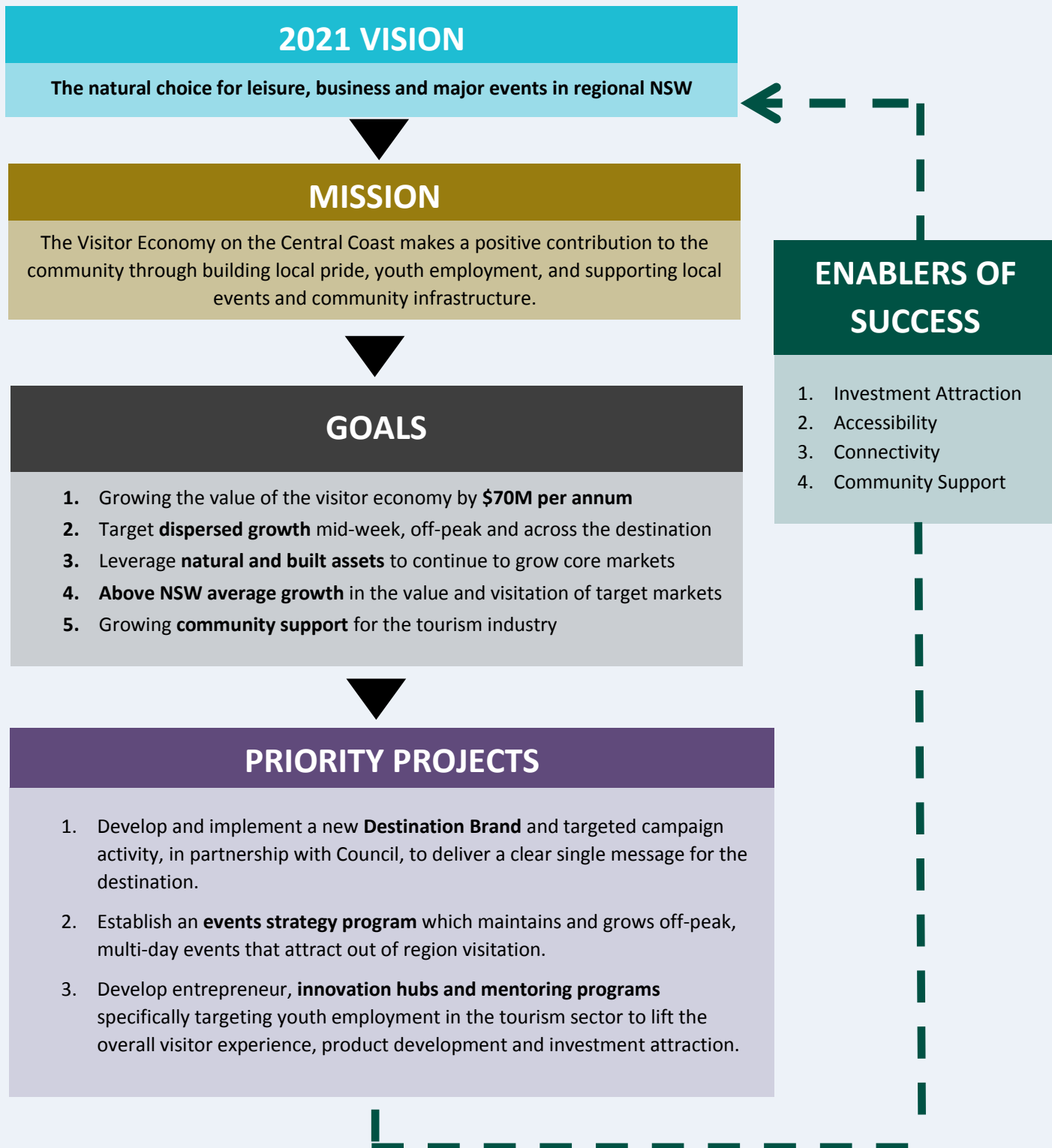


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DISCLAIMER

The information and recommendations provided in this document are made on the basis of information available at the time of preparation and the assumptions outlined throughout the document. While all care has been taken to check and validate material presented in this report, independent research should be undertaken before any action or decision is taken on the basis of material contained in this report. This report does not seek to provide any assurance of project viability and EarthCheck accepts no liability for decisions made or the information provided in this report.



Images courtesy of Destination NSW and Central Coast Council

Unless otherwise stated, all tourism statistics quoted throughout this report are courtesy of Tourism Research Australia, Year Ending December 2017

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SETTING THE SCENE

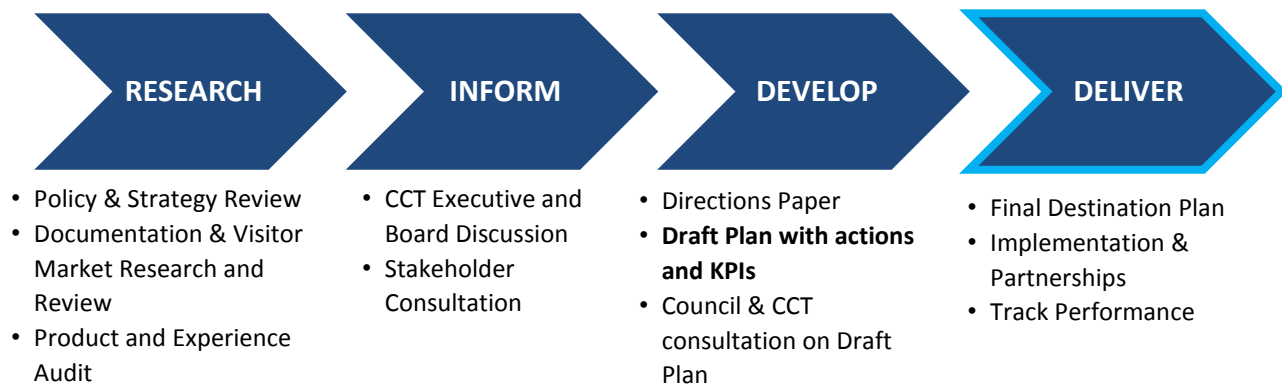
The Central Coast Destination Management Plan

The Central Coast Destination Management Plan is the **strategic framework for tourism** for the destination, owned by all stakeholders. This Plan outlines the **vision and goals** for the destination and provides a clearly evidenced business case for investments, strategies and actions.

With structural change in NSW's regional tourism network, amalgamation of Gosford City and Wyong Shire Councils and tourism growth challenges facing the region, now represents an ideal opportunity to set a new direction for tourism on the Central Coast. This Destination Management Plan is essential for the sustainable and profitable growth of the destination's tourism industry, providing a **central reference point** for the development and delivery of tourism product and services and the implementation of marketing strategies.

Central Coast Council and Central Coast Tourism have commissioned EarthCheck to work with Central Coast's tourism sector to establish this new framework for the sector. **This Destination Management Plan builds on feedback generated from consultation with industry, community members and other stakeholders.**

Figure 1: DMP Process



Structural and Administrative Change for the Central Coast Region

2016 was a year of change in administrative and management structures for two major stakeholder groups in the region's visitor economy - in local government and in regional tourism organisations. While change can be unsettling and result in loss of continuity if not managed appropriately, the opportunities provided by new governance, management and partnership arrangements need to be embraced as part of the new destination management plan.

Council Amalgamation

In 2016, the NSW Government approved the amalgamation of former Gosford City and Wyong Shire councils to create the new Central Coast Council. The new council is comprised of five wards, as seen in figure 3;

- Gosford West Ward
- Gosford East Ward
- The Entrance Ward
- Wyong Ward
- Budgewoi Ward

The new Council commenced operations on 12 May 2016, being managed under interim governance arrangements with council elections which took place in September 2017.

Figure 3: New Central Coast Council Area



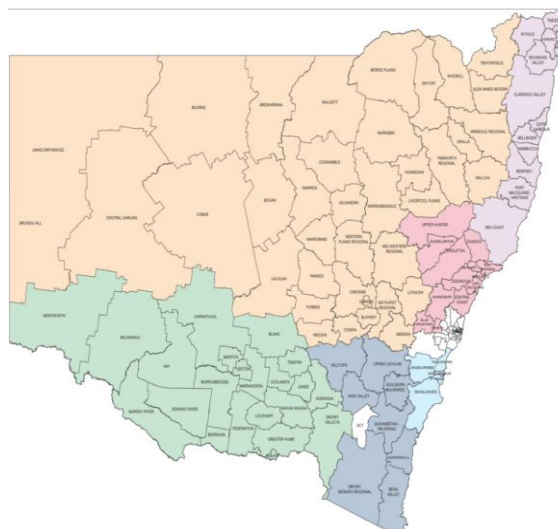
NSW Regional Tourism Network

In 2015 the Board of Destination NSW was tasked with reviewing the NSW Regional Tourism Organisations (RTOs) model. This review resulted in the implementation of new regional tourism network structures in 2016.

Six new destination networks were created through consultation with 93¹ key industry associations and stakeholders aiming to improve the Regional NSW visitor economy, resulting in the following destinations:

- **Sydney Surrounds North (Blue Mountains, Central Coast, Hunter, Hawkesbury, Penrith and Lake Macquarie)**
- Riverina Murray
- Southern NSW (Snowy Mountains and Far South Coast)
- North Coast (from Mid-Coast to Tweed Heads including Lord Howe Island)
- Country and Outback NSW
- Sydney Surrounds South (Southern Highlands, Wollongong and Shoalhaven).

Figure 4: New NSW Regional Tourism Network Boundaries



The boundaries of the new Destination Networks (DNs) aim to reflect the consumer's approach to experiences and visitation patterns, and encourage the development of visitor economy initiatives within NSW.

¹ New Tourism Network for Regional NSW, Stuart Ayres & Tony Grant, 2016, Media Release

The role of the DNs will be to facilitate visitor economy growth at the local level, through representing and co-ordinating the region's tourism industry. DNs will predominantly be destination managers. Their core responsibilities will be:

- Industry Engagement and Industry Development
- Product Development
- Training and Education
- Preliminary Review of Local RVEF (Regional Visitor Economy Fund) Applications to ensure quality/compliance with guidelines.
- Collaboration with DNSW on industry activities.

These activities will be undertaken in alignment with the region's local tourism industry, Local Tourism Organisations, Local Government, Joint Organisations and other local organisations.

Figure 5: Roles and Responsibilities in New NSW Regional Tourism Network.



Transitional funding was provided by DNSW to current Regional Tourism Organisations including Central Coast Tourism to assist in completing projects in 2016 and transitioning to new arrangements. DNSW's guidance notes that RTOs may consider evolving their remit to operate as a local tourism organisations in future. This type of arrangement would not receive core funding support from DNSW, with business models being based on revenue generated from provision of services, local government and business support, and other income streams.



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About the Central Coast

Regional Overview

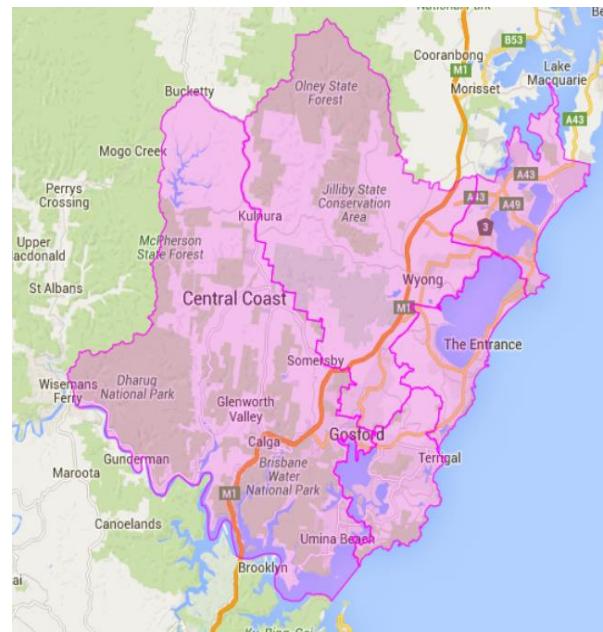
The Central Coast is located in a unique position midway between Sydney and Newcastle, providing for a population in excess of 5 million within an approximate 90 minute drive time radius.

The Central Coast is well known for its outstanding natural amenity, with the region itself home to nearly 340,000 residents in 2016. Further growth is forecast, rising to an estimated population of 415,000 by 2036. This population boom will require the construction of a further 40,000 new homes as well as vital infrastructure to support the growing population.

The National Highway both links and divides the region and its proximity to Sydney provides easy short break access while facilitating over 38,000 commuters travelling for work outside of the region each day. Creating local employment and retaining young people (18 – 29 years) remains a key challenge for the region.

Tourism plays an important role in the region's economy with the largest sectors being; retail, manufacturing, property and business services, and health and community services. The tourism industry generates essential expenditure which trickles down and supports businesses throughout the Central Coast economy.

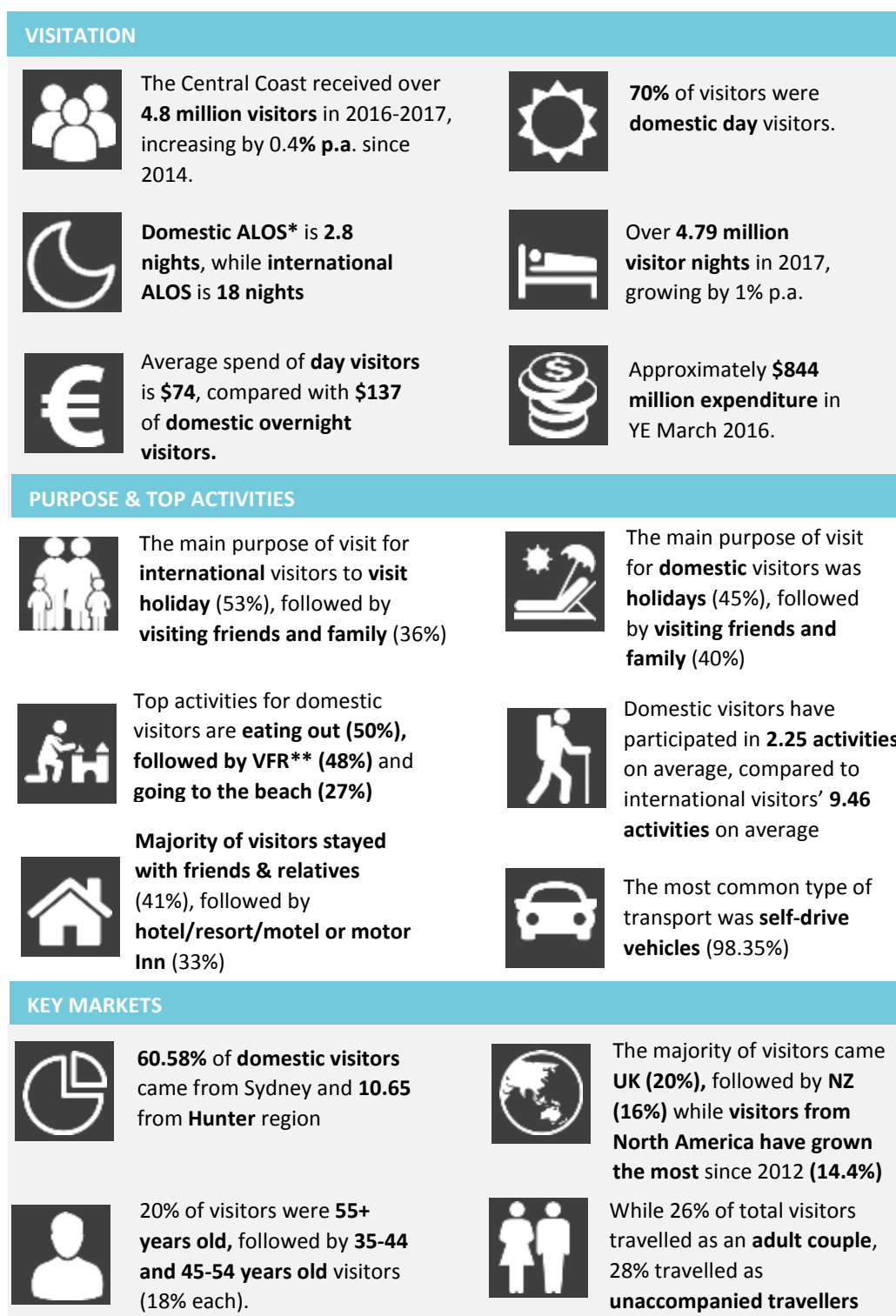
Figure 6 Central Coast Region



Key Visitor Trends

The following data (see Figure 7) summarizes key visitor trends and profiles for the Central Coast for the Financial Year Ending June 2017 by Tourism Research Australia. A more detailed visitor analysis is included in Appendix 2.

Figure 7: Central Coast Visitation Summary



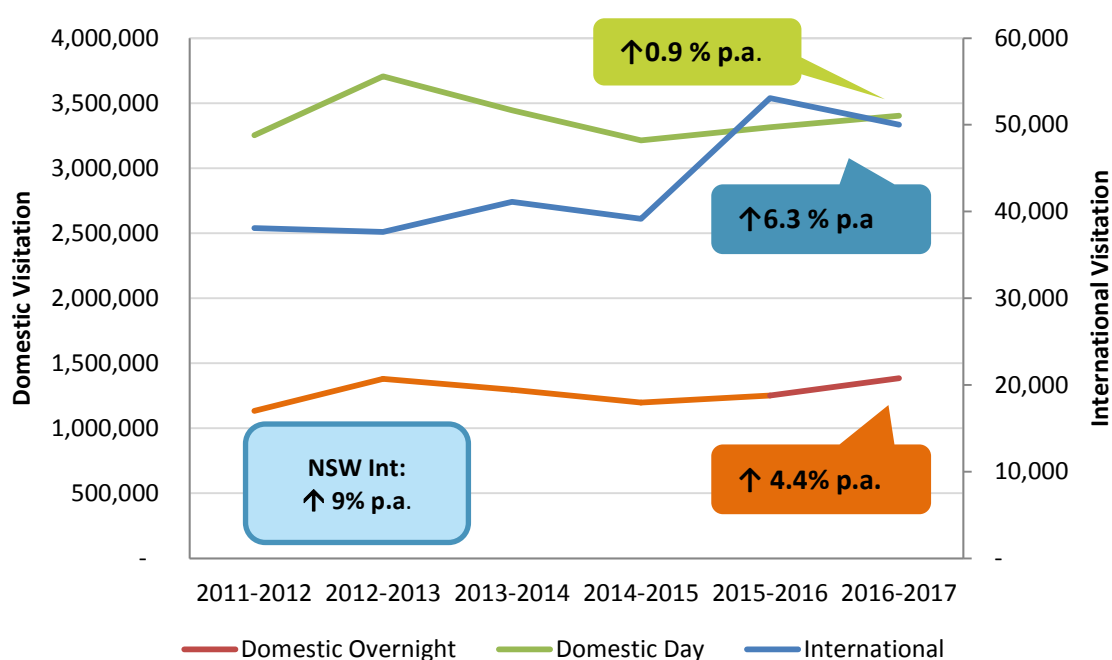
*Average length of stay

** Visiting Friends and Relatives

Visitation

In the Financial Year Ending June 2017, the Central Coast received over 4.83 million visitors in total, of which the majority (70.34%) were domestic day visitors, followed by domestic overnight visitors (28.63%). Although international visitors only accounted for about 1% of total visitors, the market had the biggest average growth rate per annum (6.3% p.a.), compared to domestic overnight visitors' 4.4% p.a. and domestic day visitors' 0.9% p.a. increase. Even though both domestic overnight and international visitation increased over the five year period since Financial Year Ending 2012, the Central Coast's average visitation growth took place at a slower pace than for NSW as a whole, which increased at an average of 9% p.a. (See Figure 8). The Central Coast region received 5% of NSW's total visitation Financial Year Ending June 2017.

Figure 8: Central Coast visitation (2010-2017)



Visitor Nights

Central Coast has received over 4.7 million visitor nights in 2016-2017, holding 2.5% of NSW's visitor night share. The NSW market has grown on average by 19% p.a. since 2012, while the Central Coast overnight market has grown by 18% in the same period. Domestic visitors accounted for approximately 81% of visitor nights, while international visitors contributed around 19% of visitor nights. International visitors also had a higher average length of stay (ALOS) compared to domestic visitors, staying for an average of 18.3 and 2.8 nights respectively.

Main Purpose of Visit

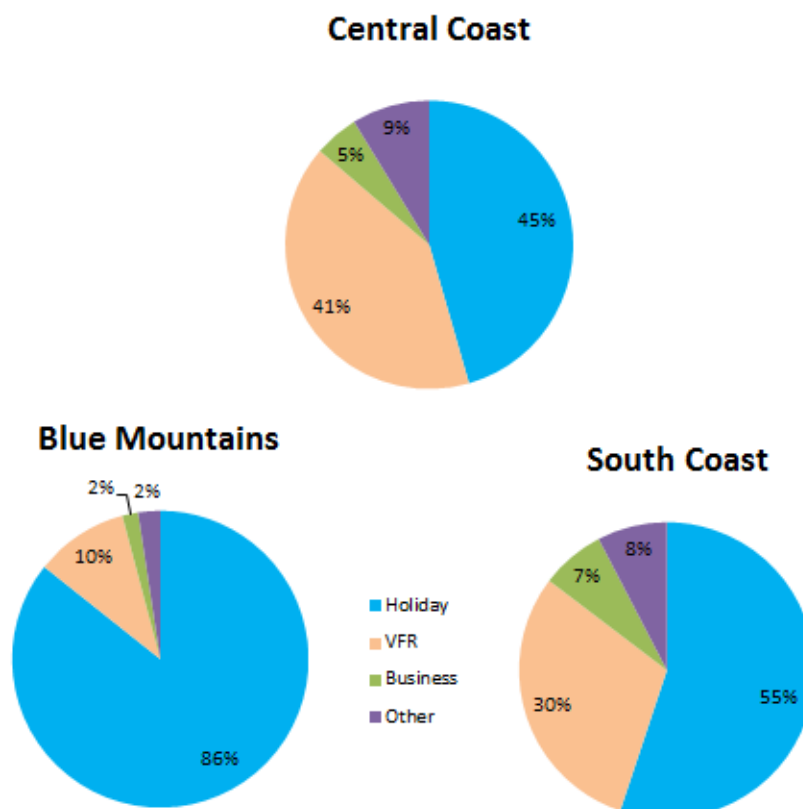
Compared to the other 'Sydney Surrounds North' areas of the Blue Mountains and South Coast, the Central Coast has a distinct visitor profile characterised by a notably larger visiting friends and relatives (VFR) market, and smaller holiday sector (see Figure 9).

Bleisure Trends ²

Recent results from Expedia (USA) show that 43% of US business travellers now extend their stays for Leisure (Dec, 2016)

² Bleisure travel: 43% of business trips are extended for leisure purposes, December 2016, eTN

Figure 9: Central Coast, Blue Mountains and South Coast Visitor Profile (Main Purpose of Visit), 2017



International Visitor Origins

The top five international visitor country origins were:

Central Coast:

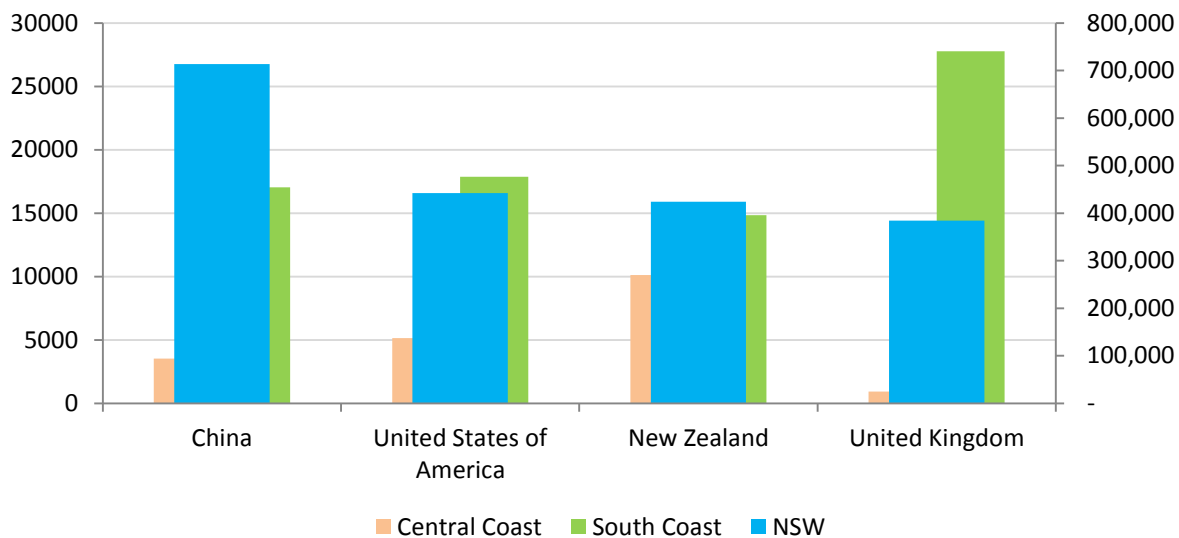
1. United Kingdom (20%)
2. New Zealand (16%)
3. USA (10%)
4. China (7%)
5. France (4%)

NSW:

1. China (18%)
2. New Zealand (11%)
3. USA (10%)
4. United Kingdom (10%)
5. Korea (5%)

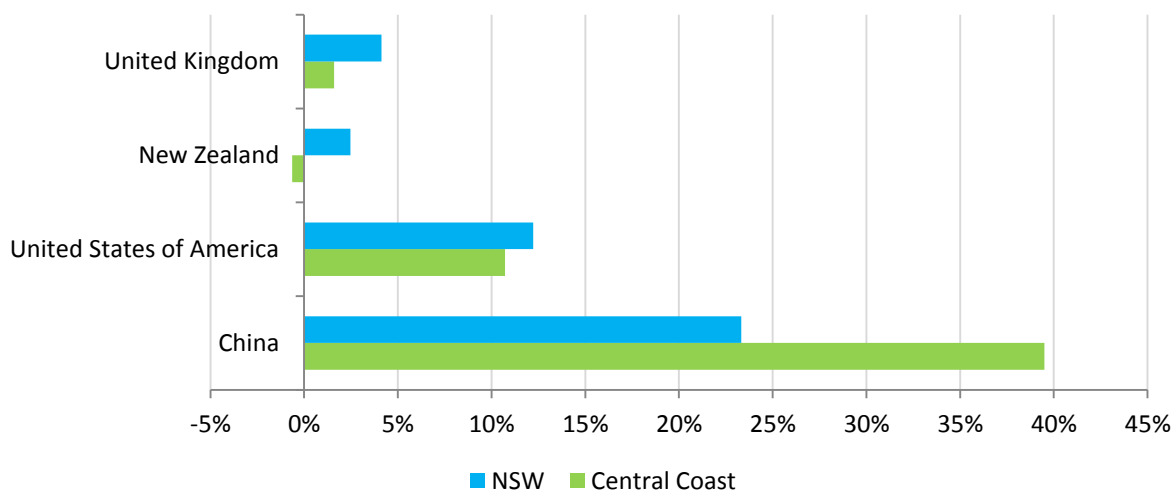
Figure 10 illustrates the relative significance of the New Zealand, USA, UK and Chinese international markets to the Central Coast in comparison with NSW. Although Chinese visitors do not register as a significant market for the Central Coast at present, it was the second fastest growing market since 2012, increasing by 39% per annum on average (Figure 11).

Figure 10: Central Coast, South Coast and NSW Top 4 International Visitor Origins, 2017



In comparison, China has been NSW's largest visitor market, accounting for 17.5% of the total international visitors. Central Coast has also seen the strongest average growth from the Dutch market (124% p.a. from a relatively low starting point), while visitors from New Zealand have experienced a small decline and UK have had a rather steady increase since 2012.

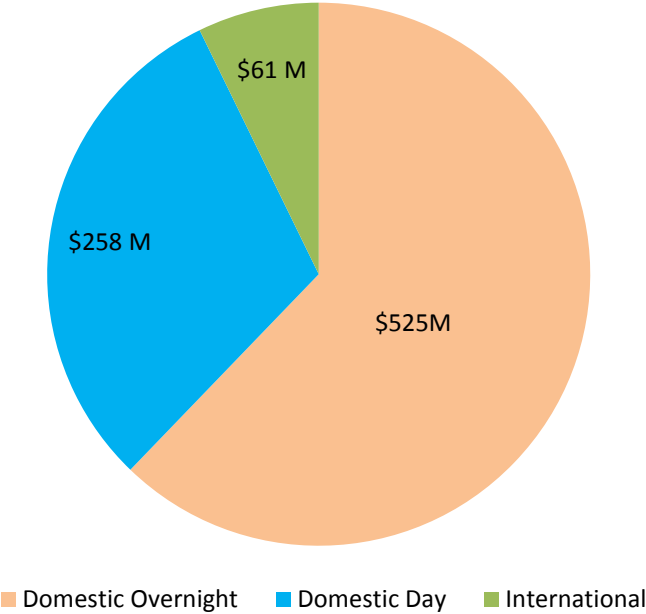
Figure 11: Central Coast and NSW Average % Change per annum International Visitor Origins (2010-2017)



Expenditure

On average, domestic day visitors to the Central Coast spent \$74 on their trip, while international visitors spent \$60 per night, and domestic overnight visitors spent \$137 per night, contributing a total of over \$844 million in visitor expenditure to the region. Although domestic day visitors make up just over 70.34% of all visitations to the Central Coast, they contribute around 30.6% of visitor expenditure. In comparison, international visitors contributed over 7.2% of expenditure, regardless of their low share in visitors market (1% of all visitors). Domestic overnight visitors, however, contributed the largest proportion of overall visitor expenditure, which was approximately 62%.

Figure 12: Visitor Expenditure, YE June 2017



The Influence of Sydney's Outbound Market

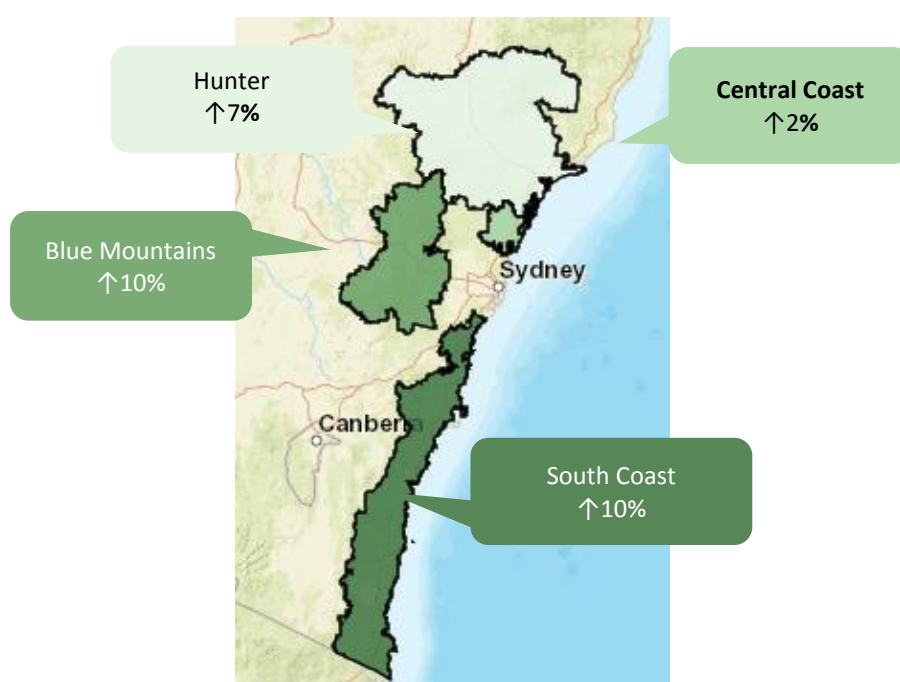
As can be seen in figure 13, the Central Coast, along with the regions of Blue Mountains, South Coast and the State as a whole all rely on Sydney's outbound visitor market as their key source of trade. Sydneysiders account for 60.5% of Central Coast's visitor market.

Figure 13: Top 5 Domestic Origins by Region, YE June 2017

Central Coast	South Coast	Blue Mountains	NSW
1. Sydney (60.6%)	1. Sydney (51.2%)	1. Sydney (77%)	1. Sydney (51.2%)
2. Hunter (10.7%)	2. Canberra (6.1%)	2. Central NSW (5.5%)	2. South Coast (23.1%)
3. North Coast NSW (5.5%).	3. Capital Country (6.1%)	3. South Coast (4.5%)	3. Canberra (6.1%)
4. Central NSW (2.5%)	4. Melbourne (1.8%)	4. Central Coast (1.2%)	4. Hunter (1.6%)
5. Blue Mountains (1.5%)	5. Blue Mountains (2.1%)	5. Hunter (1 %)	5. North Coast NSW (0.7%)

In comparison to the other Sydney surrounding regions of South Coast, Blue Mountains and the Hunter region, the Central Coast has the **lowest market share increase of Sydney's outbound market**. The region has experienced a decline in market share from 2013 to 2016, with 2017 bring the first increase in visitor numbers from Sydney. All other regions (except for the Hunter) have seen steady increases in their shares of this market (See Figure 14). This historic loss of market share may be due to factors including lack of new flagship attractions, changing consumer trends that preference other destinations, perception of the range of products and experiences on offer, and/or reduction of investment in marketing. Although Central Coast does rely heavily on the Sydney outbound market (60.6%), it has the benefit of having the largest secondary domestic market of the three comparison regions in the Hunter region (10.7%).

Figure 14: Market Share Changes of Sydney's Outbound Market (2012-2017)



4

Target Markets & Growth Potential

In order to continue to grow the value of tourism to 2021 for the Central Coast, a series of target markets has been identified (Figure 16). These markets have been identified via review of market research and industry consultation, and selected on the basis of attributes such as; market size, time and length of travel, yield, and fit with Central Coast's visitor experience offering.

Figure 16 Central Coast's Target Markets

PRIMARY GROWTH MARKETS	MARKETS TO RETAIN
<ul style="list-style-type: none"> • Sydney Long-Break (4+ nights) • Leisure, Business & Special Events: <ul style="list-style-type: none"> - Weddings (beach wedding capital) - Sporting Events (inc. mountain biking) • Young Family Escapes (Regional NSW, VIC and QLD) • Soft adventure 	<ul style="list-style-type: none"> • Domestic Day Visitors • Sydney Short-break Market (1-3 nights)
	EMERGING AND POTENTIAL MARKETS
	<ul style="list-style-type: none"> • Asian leisure and VFR visitors • Culture & Heritage • Niche Markets (i.e. pet-friendly) • Food (intertwined with other markets) • Caravan & Camping (long and short haul)

If the Central Coast were to follow national growth rates for visitation, nights and expenditure set by the Tourism Forecasting Committee (TFC), the region would see a **forecasted \$923 million in visitor expenditure in 2021** (See Figure 17).

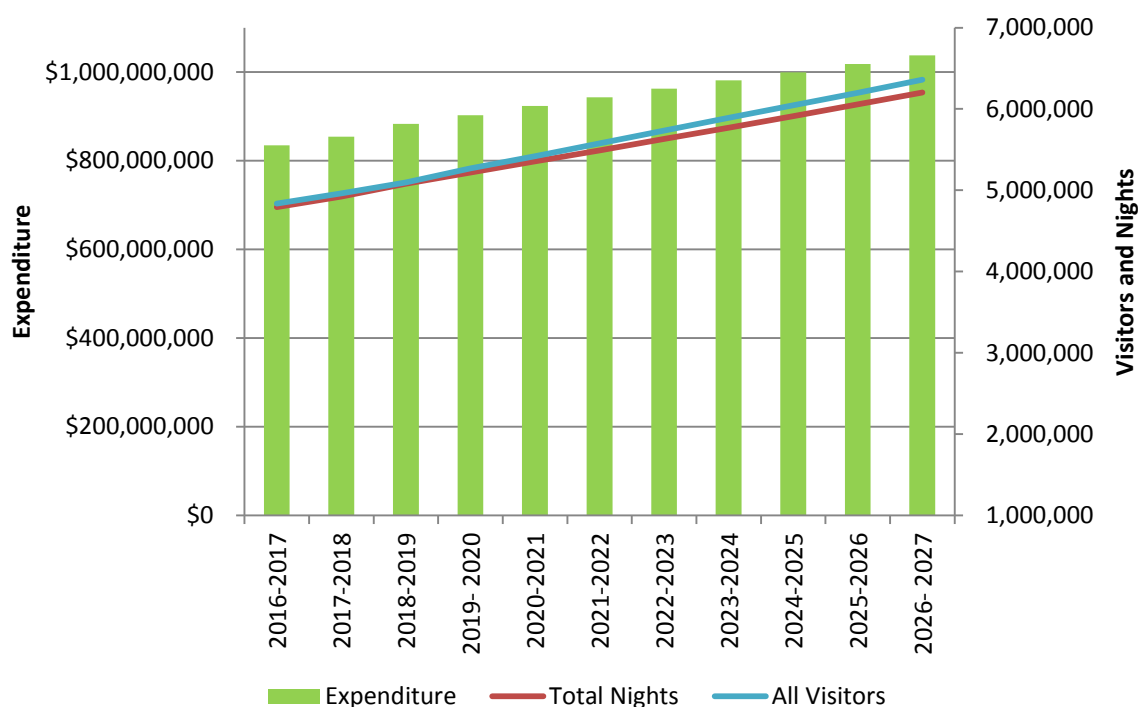


Figure 17: Central Coast's Visitor Market Forecast

Target Market Growth by 2021

The approach set out in the following section of this report is based on the premise of growing the economic contribution from a selection of target markets above the 'business as normal' TFC forecast by achieving a shift in Central Coast's capture of its target markets (referred to as 'shift share'). Other target market expenditure and visitation is based on growth continuing at TFC rates.

If the Central Coast achieved the goal share shifts in the Asia, Business and Sporting Events, Culture and Heritage, and Sydney Long-Break Markets by 2021, the region could attract an **additional \$70 million of visitor expenditure above TFC growth rates.**

This would contribute to a **total of \$923 million in total visitor spend on the Central Coast in 2021.**

Figure 18 provides a summary of the potential additional value above TFC forecasts which a successful shift in target markets would achieve.

Figure 18: Target Market Shift Share

Key Target Market Segments	2017 Value	2021 TFC Value	2017 Share	Shift - Share	2021 Additional Value (above TFC)
NATURE, CULTURE & HERITAGE	\$98M	\$175M	1.2%	0.6%	\$21M
SYDNEY LONG BREAK	\$112M	\$135M	7.6%	1.4%	\$41M
BUSINESS & SPORTING EVENTS	\$101.1M	\$123M	2.7%	0.3%	\$6M
ASIAN LEISURE AND VFR	\$13M	\$23M	0.6%	1.4%	\$2M

Sydney Long Break Market:

With approximately 60% of Central Coast's domestic market originating from Sydney, the region significantly relies on Sydney's outbound market due to its size of population and proximity to the location. However, the aim for Central Coast is to move away from the Sydney short-break market, and into the Sydney long-break market, through a targeted campaign selling the destination as 'Sydney's Beach Break', encouraging longer, more relaxed and extended stays.

Targeting the long-break market from Central Coast's major visitor origin also fills in mid-week and off-peak occupancies (long-break markets stay for at least 4 nights), and have higher expenditures.

Currently worth approximately \$112 million in visitor expenditure, if the Central Coast could increase its share of the Sydney Long-Break Market from NSW by 1.4% to 2021 (total share goal of 9%), the region would see an additional \$40 million in expenditure above TFC forecasts.

Asian Markets:

Asia is the fastest growing and highest yielding visitor origin region in the world. NSW currently attracts 60% of all Chinese visitors to Australia, and if this market share is maintained, the value of Chinese inbound tourism alone will double by 2020, contributing more than \$2.1 billion in expenditure annually (directly responsible for 13,900 jobs), and be NSW's largest international market in terms of arrivals, nights and expenditure³.

Although predominately group travel based, free independent travellers (FIT) are now starting to emerge from the Asian market, with Chinese visitors now ranking as Australia's 3rd largest for dispersed nights. This, along with Tourism Australia's and DNSW's compelling proposition for Australian promotion in China is for 'accessible nature' or 'city plus nature'; the Central Coast is in an ideal position to work with DNSW to leverage the Asian market through Sydney.

Currently worth approximately \$14 million in visitor expenditure (mainly through education and VFR), the Asian leisure market holds great potential. If the Central Coast could increase its share of the Asian leisure market from NSW by 1.4 % by 2021 (total share goal of 2.0%), the region would see an additional \$2 million in expenditure above TFC forecasts.

However, in order for Central Coast to achieve this ambitious goal, the region needs to address concerns regarding product quality, consumer relevance and language needs. This includes the need to work with DNSW to gain a better understanding of the motivations behind Asian visitors, working with DNSW to help expand trade distribution networks, and build packages, ensuring the region is Asia-ready with mandarin speaking staff, interpretative resources and promoted retail access and experiences.

Business and Sporting Events Market:

Event tourism is a growing trend nationally, particularly participation in sports and travel for business. Tourism and events are intrinsically linked, and are an integral part of a region's proactive approach to tourism, economic and social development.

The Central Coast is attracting a growing number of events, with business travel growing by almost 26% p.a. since 2010. Sporting events are also a popular activity in the region, with the destination boasting an array of sporting fields, football, soccer, golf, sail and racing clubs as well as a stadium; offering potential for further growth. Events are an important 'mid-week' market to grow, creating a reason to visit and drive visitor expenditure during traditional off-peak periods.

Currently worth approximately \$101 million in visitor expenditure, if the Central Coast could increase its share of the Business and Sporting Events market from NSW by 0.3% to 2021 (total share goal of 3.0%), the region would see an additional \$6 million in expenditure above TFC forecasts.

³ Destination NSW China Tourism Strategy 2012-20

Nature, Culture and Heritage Market:

The Cultural and Heritage Market is a broad market which includes theatre, performing arts, museums and art galleries, craft workshops and studios, festivals and fairs, history and heritage sites and buildings, and indigenous sites and experiences. Positive trends at regional, state and national levels indicate a strong and long-lasting interest in cultural tourism.

With Laycock Street Community Theatre and Wyong Art House located on the Central Coast, and the potential for a Performing Arts Centre in Gosford (following final feasibility and location studies), the region has sufficient infrastructure and programs to encourage visitation to the region and increase length of stays by encouraging participation in cultural and arts activities. The Gosford Classic Car Museum is a significant attraction in this market, housing the largest car museum in the Southern Hemisphere, showcasing over 450 cars and motorcycles. The collection is currently valued at over \$70 million, with the museum looking to expand into specialised events and packages.

Currently worth approximately \$99 million in visitor expenditure, if the Central Coast could increase its share of the Cultural and Heritage Market from NSW by 0.6% to 1.8% share, the region would see an additional \$21 million in expenditure above Tourism Forecasting Committee (TFC) forecasts.

Soft Adventure Market:

Soft adventure encompasses all low-risk adventure tourism activities such as surfing, kayaking, snorkelling and mountain biking. These activities are largely outdoor-orientated and are more accessible to key markets such as families, school groups and mature visitors. Australia's nature-based offerings contribute significantly to the success of the soft adventure market at regional, state and national levels.

With more waterfront than Sydney Harbour, the Central Coast's waterways and beaches provide the region with a critical competitive advantage, especially in addition to its pristine mountains and hinterland. Encouraging local business and start up innovation in nature-based and soft adventure opportunities is a growth opportunity, and will keep the already strong industry and infrastructure growing (i.e. Glenworth Valley, TreeTops).

Weddings

Weddings have also been identified as a target growth market, however, Tourism Research Australia (TRA) data does not treat weddings as a discrete 'purpose of travel' category therefore data isn't currently available to determine a shift share target. Nonetheless, the region's wide range of coastal and inland venues offers potential for growth.

Developing a niche position, collaborating with industry and government, and successfully promoting it to market are key enablers in this sector. This could potentially take the form of a beach weddings program with identified sites for beach and hinterland weddings and marquee receptions.



5

Vision, Mission and Goals

ASPIRATION	SUPPORTING ACTIONS
<p>Vision:</p> <p><i>The vision for the Central Coast is to be the natural choice for leisure, business and special events in regional NSW.</i></p>	<p>In order to achieve this vision, the region needs to capitalise its unique selling points or visitor drivers:</p> <ul style="list-style-type: none"> • Water and natural features • Central Coast Community, Culture and History including our beach culture • Connection of the different experiences available across the region (beach, hinterland, towns)
<p>Mission:</p> <p><i>The Visitor Economy on the Central Coast makes a positive contribution to the community through building local pride, youth employment, and supporting major events and community infrastructure.</i></p>	<p>The mission will be achieved through:</p> <ul style="list-style-type: none"> • A focus on sustainable tourism that encourages mid-week, off-peak and dispersed visitation. • Community engagement through events and new experiences • Brand building campaigns that lift community pride and drive investment • The visitor economies contribution to youth employment
<p>Goals:</p> <p><i>The success of the DMP will be measured through:</i></p> <ul style="list-style-type: none"> • <i>Growing the value of the visitor economy by \$70M per annum above growth forecasts</i> • <i>Target dispersed growth mid-week, off-peak and across the destination (coast & hinterland)</i> • <i>Above NSW average growth in the value and visitation by identified target markets</i> • <i>Growing community support for the visitor economy</i> 	<p>Supporting measure of success include (and how they will be measured):</p> <ul style="list-style-type: none"> • Awareness, Preference and Intention to visit with a clear destination identity and a shift in perceptions of the range and depth of experiences in key target markets (primary research) • Growing Customer satisfaction • Youth Employment (ABS trends) • Industry and Community awareness of the value of the visitor economy (primary research) • Lift number of activities participated in by visitors (NVS, IVS)



6

Strategic Priorities and Projects

To achieve the destination vision and goals, a concise set of strategic priorities and projects are required to guide collective action and investment. It is recommended that action is categorised under 3 strategic priorities, with each having at least 1 priority project;

Strategic Priority 1:

Priority Project 1:

Drive visitor expenditure through targeted campaigns

Develop and implement a new **Destination Brand** and targeted campaign activity, in partnership with Council, to deliver a clear single message for the destination.

Strategic Priority 2:

Priority Project 2:

Encourage Visitor Dispersal

Establish an **events strategy program** which maintains and grows off-peak, multi-day events.

Strategic Priority 3:

Priority Project 3:

Boost Community Support through Tourism Employment

Develop entrepreneur, **innovation hubs** and mentoring programs specifically targeting youth employment in the tourism sector to lift the overall visitor experience, product development and investment attraction

Enablers:

Create an environment for investment and reinvestment which drives new product, new stories and new reasons to stay and spend on the Central Coast.

Strategic Priority 1: Drive visitor expenditure through targeted campaigns

The Central Coast faces growing competition in its key target markets (Sydney, Regional NSW) and is losing market share. While day and international markets are growing above the NSW average, the challenge remains to lift domestic overnight stays to above the average and regain lost market share.

The reasons identified for a loss of market share include:

- Lack of a clear and iconic **'wow' experience**
- **Increasing competition** from other coastal destinations
- Lack of **clarity in the sales messages** across industry, regional marketing and the State campaigns

Priority Project #1: Develop and implement a new Destination Brand and targeted campaign activity, in partnership with Council, to deliver a clear single message for the destination

Supporting Projects:

Visiting Friends and Relatives (VFR) Campaign – linked to messages to Council's place building campaign to drive local awareness, pride and visitor participation in activities and events.

Long-Break Sydney Outbound Campaign – targeting longer stays (4-7 nights) from Sydney residents to regain market share and encourage stays during the off-peak mid-week times.

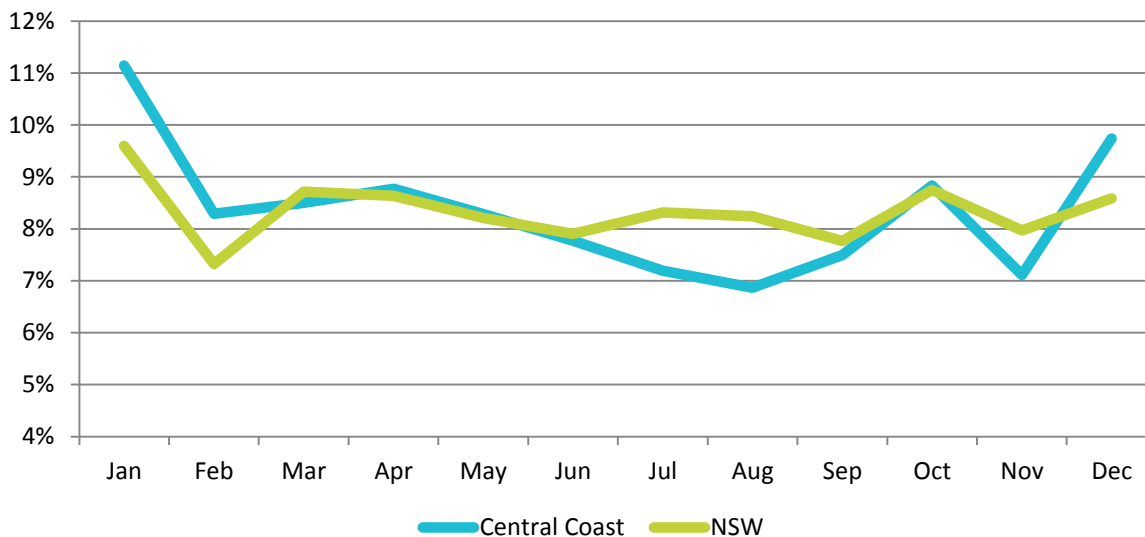
Supporting Actions and Opportunities:

Action	Partners (Bold to Lead)	Timing
1.1 Work with the Destination Network and DNSW to scope and deliver a targeted campaign for the Sydney long-stay (4+) market seeking a beach and nature-based escape	CCC, DN, DNSW	2017/18
1.2 A revamped Council website , linked to the destination website, to drive local and VFR awareness	CCC	2018
1.3 Implement a Regional Signage Strategy following the place strategy and branding of each village with a clear village and town centre identity	CCC	2019
1.4 A year-round 'always on' social media campaign focused on the region's USPs and unexpected experiences	CCC, Industry	Ongoing
1.5 International product mentoring to increase the range and depth of experiences on offer at international trade shows such as the Australian Tourism Exchange (ATE)	CCC	Ongoing
1.6 Introduce a customer experience monitoring and mentoring program , measured through analysis of visitor satisfaction ratings such as TripAdvisor (using programs such as ReviewPro)	CCC	Ongoing

Strategic Priority 2: Encourage Visitor Dispersal

Domestic overnight and day visitation to the Central Coast generally peaks during the summer months of January and December, with key off-peak months being June through to August (See Figure 6), reflecting seasonal weather patterns, key regional events and school holidays. The figure below does not include international overnight and international day seasonality trends.

Figure 19: Domestic Seasonality Trends of Central Coast and NSW (3 Year Averages 2014-2016)



Priority Project #2: Establish an events strategy which supports the development and growth of off-peak, multi-day events across the target markets of nature, culture, special events (e.g. weddings, conferences), and soft adventure.

Events can play a significant role in encouraging new and repeat visitation to a destination, creating specific reasons to visit and increased visitor expenditure during traditional off-season. Implementing strategies such as utilising events to shift peak demand, both by day of the week, and month of travel, is vital to managing the future visitor experience and sustainable destination.

Supporting Projects:

Conference and Events Promotion – Increase private and public marketing funds for the promotion of the Central Coast as a conference and events destination to attract off-peak and multi-day events which drive out-of-region visitation

Supporting Actions and Opportunities:

	Action	Partners (Bold to Lead)	Timing
2.1	Develop a business case for new mountain bike trails to attract a world-class event to the Central Coast	CCC, NPWS	2018/19
2.2	Ensure Council Planning guidelines for beach events are supportive of flexible uses and promote the steps required to run beach-based events	CCC, LGA NSW	2018
2.3	Create an investment platform for new nature-based tourism projects through an Ecotourism and Rural Tourism Opportunities Study	CCC, State Govt	2019-2021
2.4	Map and develop Management Plans for sacred sites to ensure they are not impacted by future outdoor recreation programs	Indigenous Groups , CCC	2021
2.5	Utilise the new Central Coast Regional Sporting and Recreation Complex to host, not only sporting events, but also more community and social events through the multipurpose indoor complex.	CCC	2019/20
2.6	Develop heritage trail in Gosford to complement other cultural attractions	CCC	
2.7	Create interconnected cycleways to encourage exploration across the region	CCC	



Create investment platforms and incentives for nature-based tourism projects

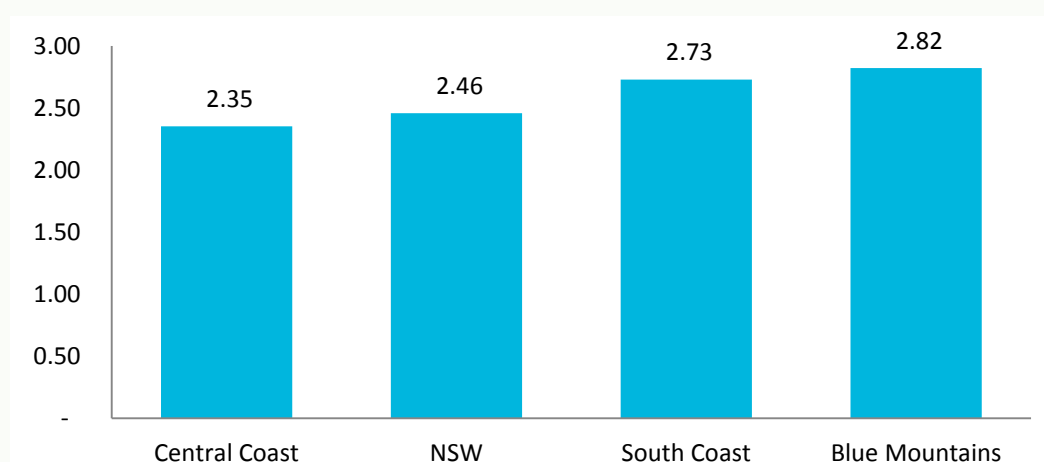
Being underrepresented in outdoor adventure, nature-based and accommodation products compared to destination comparators (see ATDW Table 1 and Figure 20 below), the Central Coast has an opportunity to capitalise on its hinterland and marine visitor growth and encourage visitor dispersal through increasing its outdoor adventure and nature-based product and accommodation offering.

To sustainably promote hinterland product and visitor dispersal, it is recommended an Ecotourism and Rural Tourism Opportunities Study be prepared to qualify major market gaps, identify key opportunities based on recent and forecasted trends, identify potential sites, promote awareness of opportunities and provide advice on key experience investments. Following this initial detailed study, Council may then publish an Expression of Interest to encourage investment in additional hinterland product including the potential for investment incentives such as rate reductions and streamline planning to encourage private investment.

Table 1: Australian Tourism Data Warehouse Product Listings ⁴

ATDW Listed Product	Central Coast	South Coast	Sunshine Coast	Mornington Peninsula	Comparator Average
Tours	18	86	73	20	60
Accommodation	35	296	132	25	151
Attractions	19	115	30	22	56
Food & Wine	14	30	9	22	20
Nature - Based	5	32	14	8	18
Family - Friendly	4	26	11	7	15
Outdoor Adventure	5	17	8	6	10
Marine - Based	4	17	5	4	9
Arts, Culture & Heritage	4	22	13	8	14
Aboriginal	0	0	0	0	0

Figure 20: Average Number of Different Activities Participated in by Domestic Visitors



⁴ Australian Tourism Data Warehouse (ATDW) is a national platform for digital tourism data, providing content for tourism operators and distributors. Product listings provide an audit of the tourism offerings, available by region.

Strategic Priority 3: Boost Community Support through Tourism Employment

This strategy presents significant opportunity to capitalize on, and develop, Central Coast's available workforce. With a high number of residents journeying outside of the region for employment, and a significantly high youth unemployment rate of 16.5% (29% above the national average), tourism and hospitality plays an important role in providing pathways and soft skills for young people in the community.

The tourism sector provides a valuable source of employment for young people, especially by students who often undertake part-time or casual work in the industry whilst studying. In fact, as much as 39% of all tourism related jobs are filled by youth aged between 15 and 24 years old in the Asia-Pacific region⁵.

Priority Project #3: Develop entrepreneur, innovation hubs and mentoring programs specifically targeting youth employment in the tourism sector to lift the overall visitor experience, product development and investment attraction, investigating possible opportunities in partnering with the Regional Library and Smart Hub.

There are numerous ways in which the tourism industry can provide youth employment for the Central Coast. Developing youth entrepreneur or start-up programs specifically for the tourism sector can benefit the region by removing barriers to entry for young persons through the creation of low-cost, shared business facilities and technology spaces.

Supporting Projects:

Local Ambassadors Program – Develop and implement a Local Ambassadors Program to build local support for the visitor economy

Supporting Actions and Opportunities:

Action	Partners (Bold to Lead)	Timing
3.1 Further investigate the opportunity for the Central Coast to be recognised as a National Surfing Reserve	CCT, Industry	Long Term

⁵ United Nations World Tourism Organisation (UNWTO) 2009, The Tourism Labour Market in the Asia-Pacific Region, <http://www.e-unwto.org/doi/pdf/10.18111/9789284413133>



7

Enablers of Success

The success of this Destination Management Plan and its strategies are underpinned by a series of enablers outlined below:

Investment Attraction

The region needs investment and reinvestment in new products and experiences, including accommodation, attractions and experiences (including marine-based, nature based and culinary). To do this, an investor-friendly environment is essential (see case study over the page).

Accessibility (Creating Accessible Tourism Experiences)

With one in five people in Australia having some form of disability (over 4 million people)⁶, Central Coast's tourism industry and community have identified disability tourism as an enabler of success, in which the Central Coast could comprehensively cater to this market. It is recommended that two precincts on the Central Coast (each in the Northern and Southern regions) be chosen as pilot and market-first areas to lead the region in accessible tourism. These precincts would first require detailed audits to determine the level of disabled friendly infrastructure, product and experiences currently available that impact the entire visitor experience, then based on this audit, would need to undergo any infrastructure required to facilitate easy access.

Connectivity (Visitor Transport)

While most visitors travel to the destination by self-drive vehicle, an initial visitor offering gap was identified through consultation of visitors who are able to arrive in region (via public transport such as train) but are unable to move between attractions or towards the hinterland due to lack of connecting public transport routes or lack of information provided on public transport service routes.

By undertaking an initial Pre-feasibility Study and Preliminary Visitor Transport Mapping Model research (e.g. number of trips required, routes, number of visitors, time of departures, etc.), the region is able to assess the extent of market gap and potential models for visitor transport. This could include options such as a mini-bus operated by key attractions whose visitors use the service or a local driver Uber type service which is packaged and subsidised specifically for visitors.

Community Support

Community support for tourism is vital in providing an overall complete positive visitor experience to all visitors, and in growing tourism to encourage higher yield, expenditure and in turn, local jobs. The first step in understanding how communities and residents perceive tourism to help inform decision making and regional tourism authorities, by undertaking a 'Have Your Say Platform' to undertake a Community Impact Assessment on an agreed set of social indicators that have been used in other regions such as Queensland. Community attitudes of tourism on the Central Coast can then be compared to other regions to gain a relative understanding of how tourism is perceived to positively or negatively impact the Central Coast.

⁶ Australian Network on Disability

CASE STUDY: Redland City Council, Queensland – Hotel Development Incentives

Redland City Council established an incentives package to facilitate further development of the Cleveland Central Business District (CBD) as well as contribute to jobs and growth across the region. Investors can take advantage of:

- 75%-100% discount on infrastructure contributions, depending on the development type
- 20-business day assessment timeframe
- Car-parking concessions for complying developments
- Self-assessment for changes of tenancies.

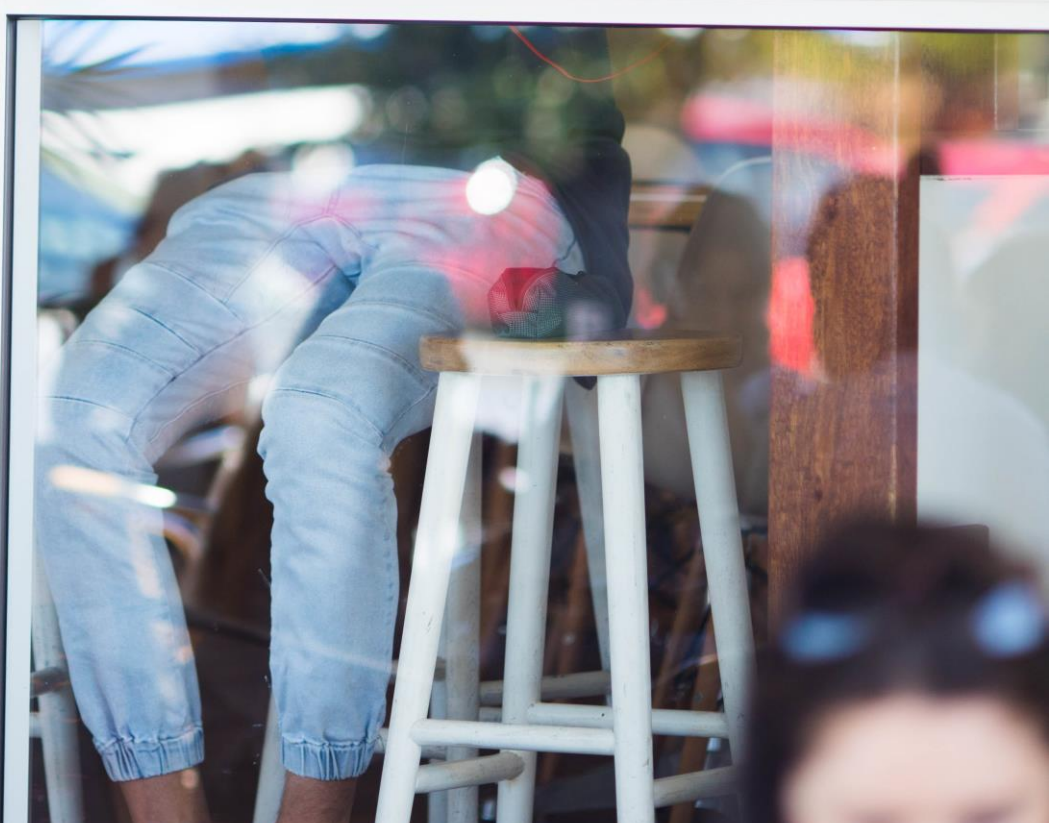
This incentives package is available to proposed developments that:

- Are located on land in Cleveland CBD
- Includes eligible uses – i.e. aged care and special needs housing (mixed-use development), apartment building (mixed-use development), commercial office, community facility, education facility, health care center, hotel, indoor recreation facility (cinemas, convention center, fitness center), refreshment establishment, shop, tourist accommodation.
- Are consistent with outcomes of the Redlands Planning Scheme and the Cleveland Centre Master Plan

As of July 2015, \$128,000 had been provided in development application fee discounts, with up to \$1.5 million available in infrastructure charge concessions to generate new investment to the city.

The tourism component of the incentives applies across the entire city and the fact that the majority of the applications currently being assessed are for tourism projects shows that including tourism projects in the incentives is yielding results. The two most advanced tourism accommodation projects, both proposed for Waterloo Street, would result in 7,767 square meters of vacant city land being transformed into vibrant, new tourism accommodation (hotel) and commercial precincts.





8

Measures of Success

Volume and Value Goals

- Increase the **value of the visitor economy** by \$70M per annum above forecast growth
- Increase Central Coast's **market share** of
 - o Sydney long break visitors to NSW by 1.4% by 2021
 - o Asian visitors to NSW by 1.4% by 2021
 - o Business and Sporting Event Visitors to NSW by 0.3% by 2021
 - o Culture and Heritage visitors to NSW by 0.6% by 2021
- Increase tourism employment locally by 300 jobs by 2021 with a focus on youth employment
- Diversify Central Coast's visitor and market mix to **reduce seasonality** in visitation patterns

Qualitative Goals

- Build **community satisfaction** with tourism on the Central Coast, targeting a 10% improvement from 2017 benchmark
- Build **customer satisfaction** with Central Coast tourism experiences, targeting a 10% improvement from 2017 benchmark
- Improved **perception of Central Coast** in target markets, as measured by ROI from marketing investment

Financial and Investment Goals

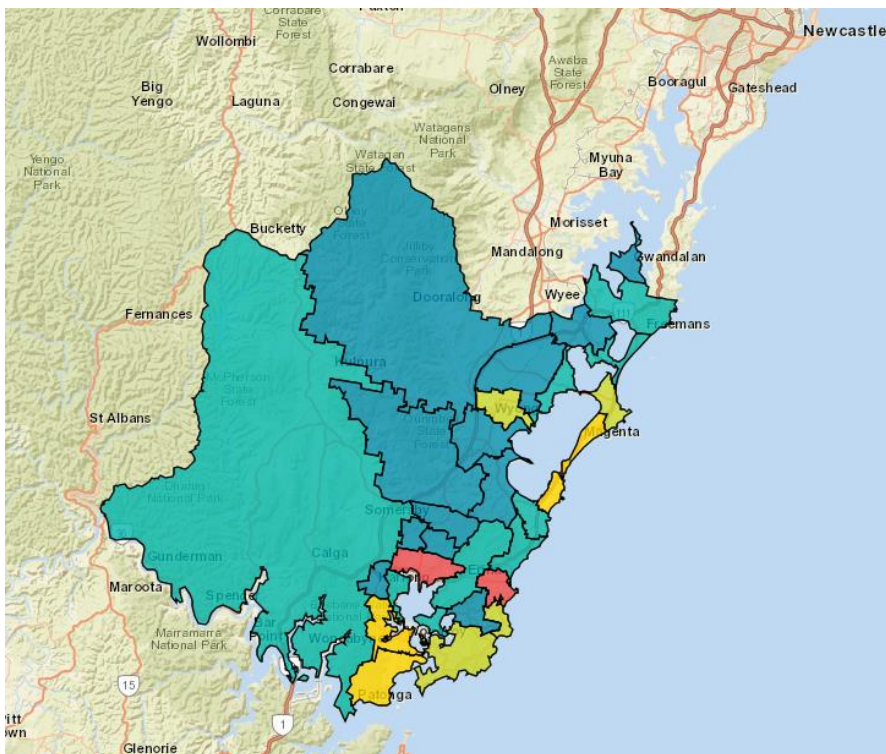
- Value of new **private sector tourism investment** by 2021
- Value of **public sector investment** per year, maintained over the course of the DMP
- Value of **co-operative marketing** investment will grow by 5% year on year over the course of the DMP

Destination Market and Industry Engagement Goals

- Effective destination marketing strategy that meets objectives to increase value for the Central Coast visitor economy, demonstrates reach and impact and collaboration with the local tourism industry.
- An engaged Central Coast tourism industry that values industry services and are services that facilitate industry to realise opportunities for themselves in training, access to relevant tourism information, networking and promotional opportunities.
- Strong industry and other partnerships that support the destination marketing strategy.



For the purposes of this plan, visitation data and trends include the Statistical Areas (level 2) identified in Figure A⁷.



⁷ For the purposes of this Paper, visitation data and trends includes the Statistical Areas (level 2) of: Avoca Beach-Copacabana, Box Head-MacMasters Beach, Calga - Kulnura, Erina- Green Point, Gosford - Springfield, Kariong, Kincumber -Picketts Valley, Narara, Niagara Park - Lisarow, Point Clare - Koolewong, Saratoga - Davistown, Terrigal - North Avoca, Umina - Booker Bay - Patonga, Wamberal - Forresters Beach, Woy Woy - Blackwall, Wyoming, Bateau Bay - Killarney Vale, Blue Haven - San Remo, Budgewoi - Buff Point - Halekulani, Chittaway Bay - Tumby Umbi, Gorokan - Kanwal - Charmhaven, Jilliby - Yarramalong, Lake Munmorah - Mennering Park, Ourimbah - Fountaindale, Summerland Point - Gwandalan, The Entrance, Toukley - Norah Head, Tuggerah - Kangy Angy, Warnervale - Wadalba, Wyong, Central Coast Region nfd.

Visitation Growth and Market Share:

In 2017, Central Coast received approximately 4.87 million visitors, of which 70.34% were domestic day visitors, 28.63% were domestic overnight visitors and 1% were international visitors. These domestic day visitors have increased by an average of 4.4% per annum (p.a.) since 2012, while domestic overnight visitors and international visitors have grown by an average of 1%p.a. and 6.3%p.a. since 2012 respectively (See Figure B).

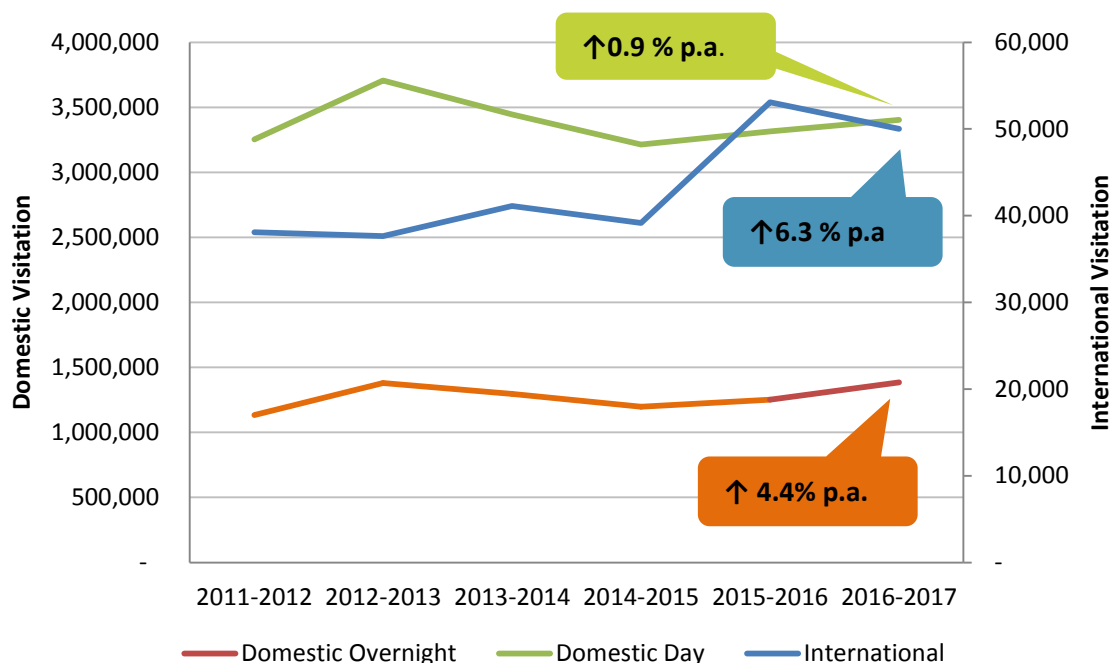


Figure B: Visitation to the Central Coast, 2012-2017 Trends

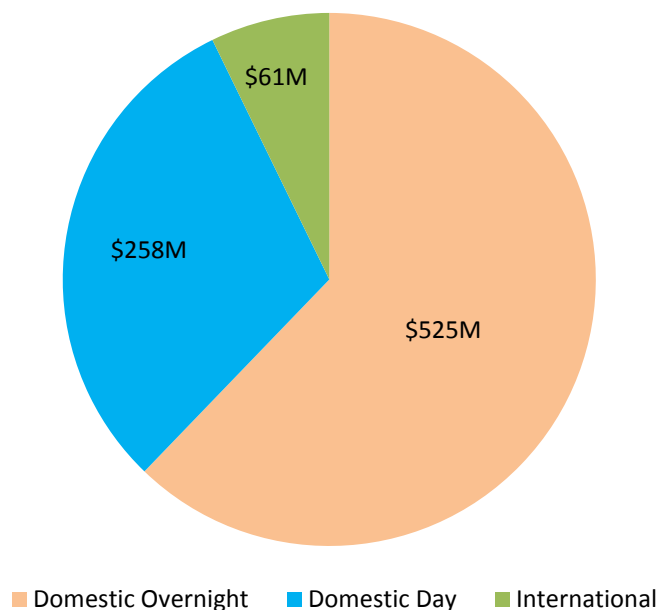
Visitor Nights

Central Coast has received over 4.7 million visitor nights in 2016-2017, holding a 2.5% of NSW’s visitor night share. The NSW market has grown on average by 19% p.a. since 2012, while the Central Coast overnight market has grown by 18% in the same period. Domestic visitors accounted for approximately 81% of visitor nights, while international visitors contributed around 19% of visitor nights. International visitors also had a higher average length of stay (ALOS) compared to domestic visitors, staying for an average of 18.3 and 2.8 nights respectively.

Expenditure

On average, domestic day visitors to the Central Coast spent \$74 on their trip, while international visitors spent \$60 per night, and domestic overnight visitors spent \$137 per night, contributing a total of over \$844 million in visitor expenditure to the region. Although domestic day visitors make up just over 70.34% of all visitations to the Central Coast, they contribute around 30.6% of visitor expenditure. In comparison, international visitors contributed over 7.2% of expenditure, regardless of their low share in visitors market (1% of all visitors). Domestic overnight visitors, however, contributed the largest proportion of overall visitor expenditure, which was approximately 62%.

Figure C: Visitor Expenditure, YE June 2017



Purpose of Visit:

The main purpose of visit to the Central Coast by domestic visitors in 2017 was for a holiday (46%), closely followed by visiting friends and relatives (VFR) (40%). In comparison, VFR was the main purpose of visit for international visitors (53%), followed by holidays (36%). While domestic visitors to Central Coast with the purpose of VFR have declined slightly since 2014, the Holiday market has increased. International visitation with the purposes of holiday and VFR has grown by 1%p.a. and 14% p.a. respectively since 2014. Business visitation has remained steady since 2012.

Figure D: Main Purpose of Visit to Central Coast by international and domestic visitors combined, YE June 2017

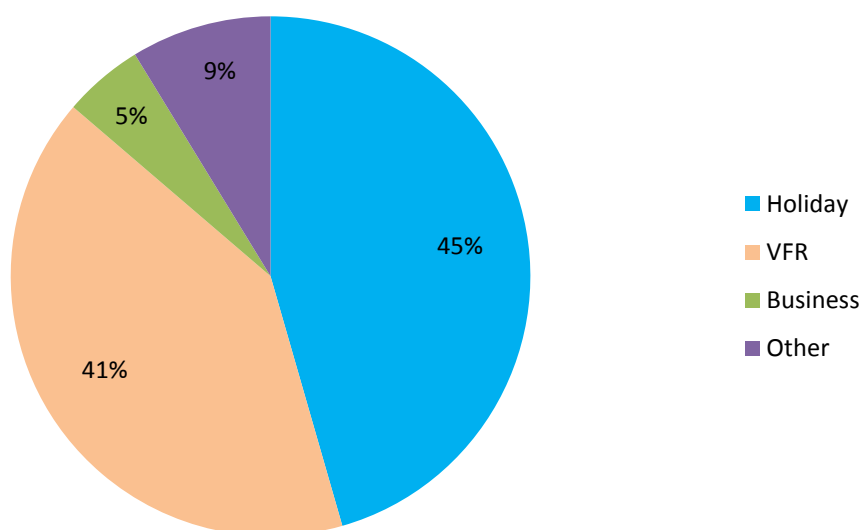
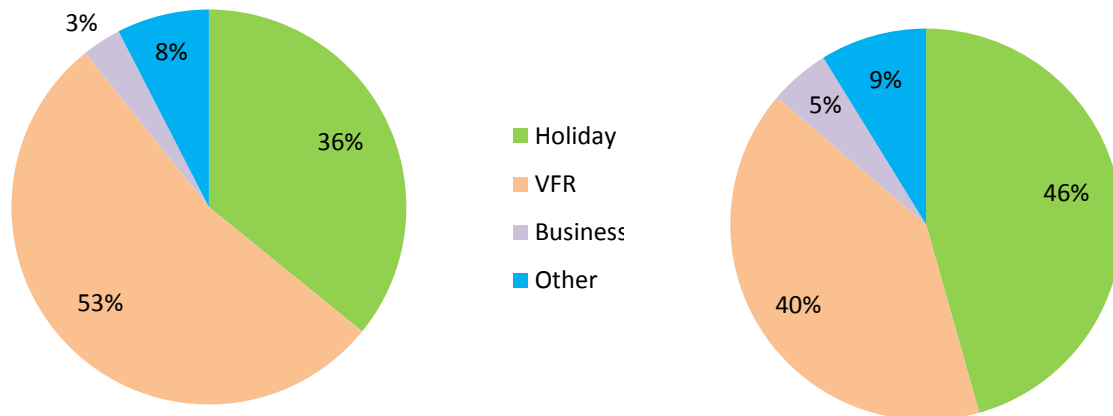


Figure E: Main Purpose of Visit to Central Coast for domestic (left) and international visitors (right), YE December 2017



Visitor Origins:

The majority of international visitors to the region were from the United Kingdom (UK) (20%) and New Zealand (16%), followed by the United States of America (USA) (10%) and then China (7%) with France following closely (4%). France and Canada are the 4th and 5th highest countries of origin, they have increased by 25%p.a. and 66%p.a. respectively since 2012, while the UK market has only increased by 2%p.a. in the same time. The largest growth has been from the Dutch market, which has increased by 124%p.a. but currently represents only 3.1% of Central Coast's international visitors.

International visitors from Europe comprise 39.63% of the total international visitors, remaining the largest international visitor market (Figure F).

In 2017 the top five visitor origins by country were:

1. United Kingdom (20%)
2. New Zealand (16%)
3. USA (10%)
4. China (7%)
5. France (4%)

Figure F: Central Coast International Visitor Origin, YE June 2017

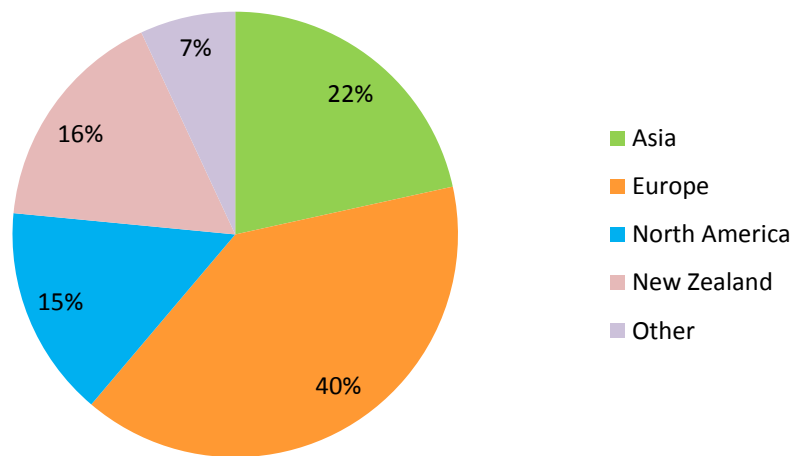
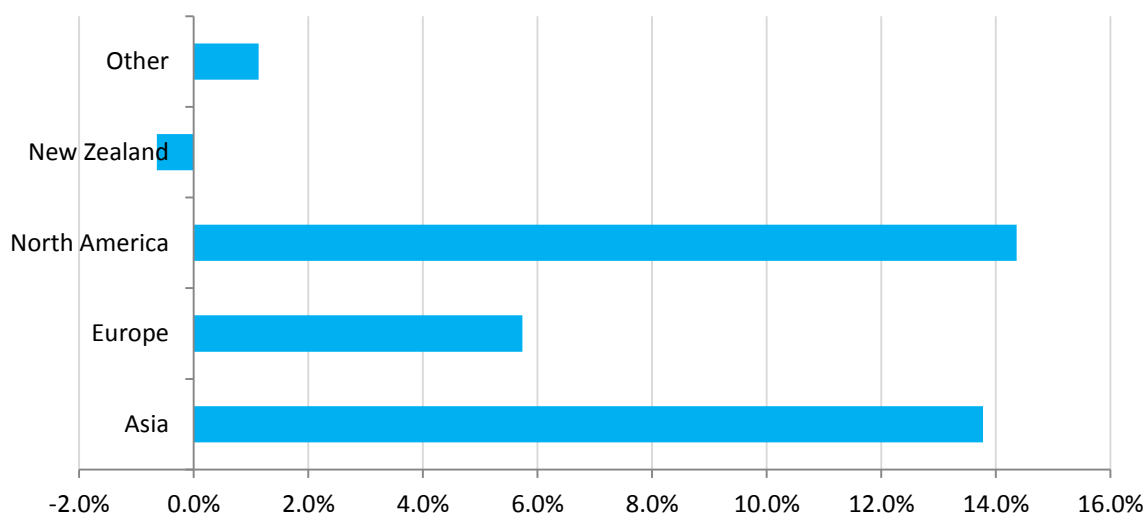


Figure G: Central Coast International Visitor Origin growth, YE December 2012 – 2017

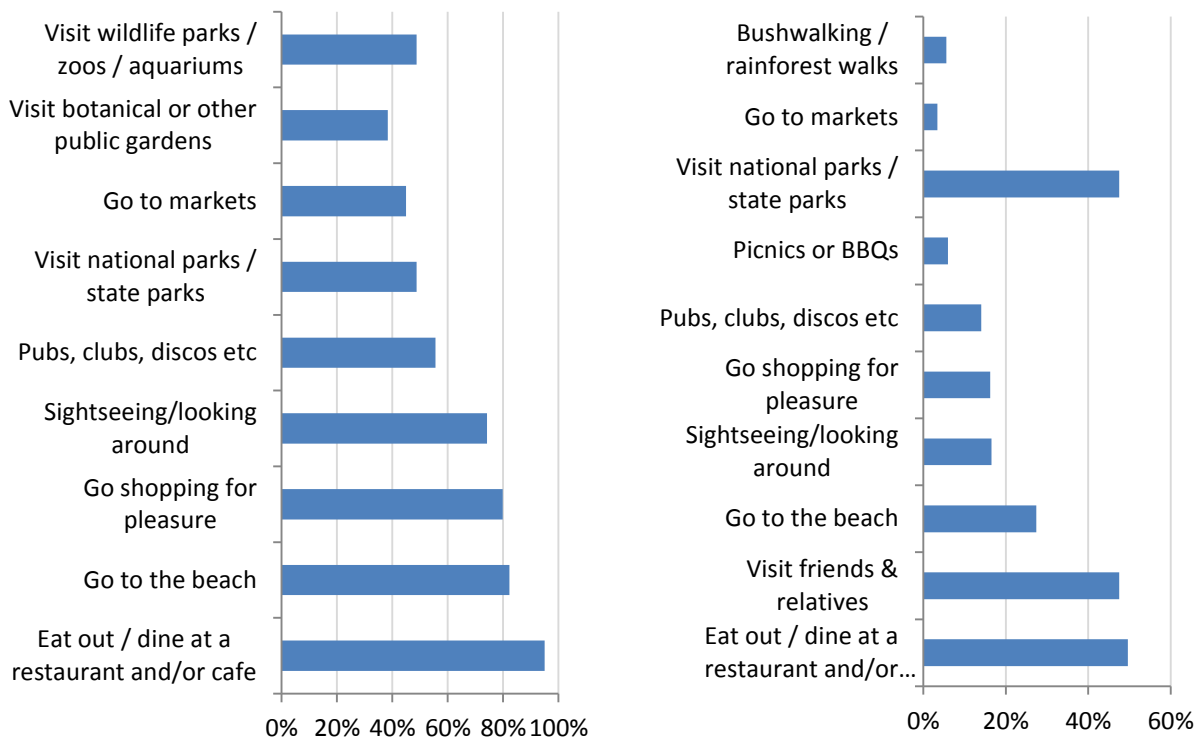


The majority of domestic visitors come from Sydney (60.58%), followed by visitors visiting from the Hunter region, who make up 10.65% of the total domestic visitation.

Activities:

Eating out at a restaurant was the most popular activity amongst both international and domestic visitors in the Central Coast. The number of domestic and international visitors participating in sightseeing and going to the beach were also significant. Apart from these similarities, international visitors were far more likely to participate in going shopping, whereas domestic visitors were more likely to participate in visiting friends and relatives (Figure H).

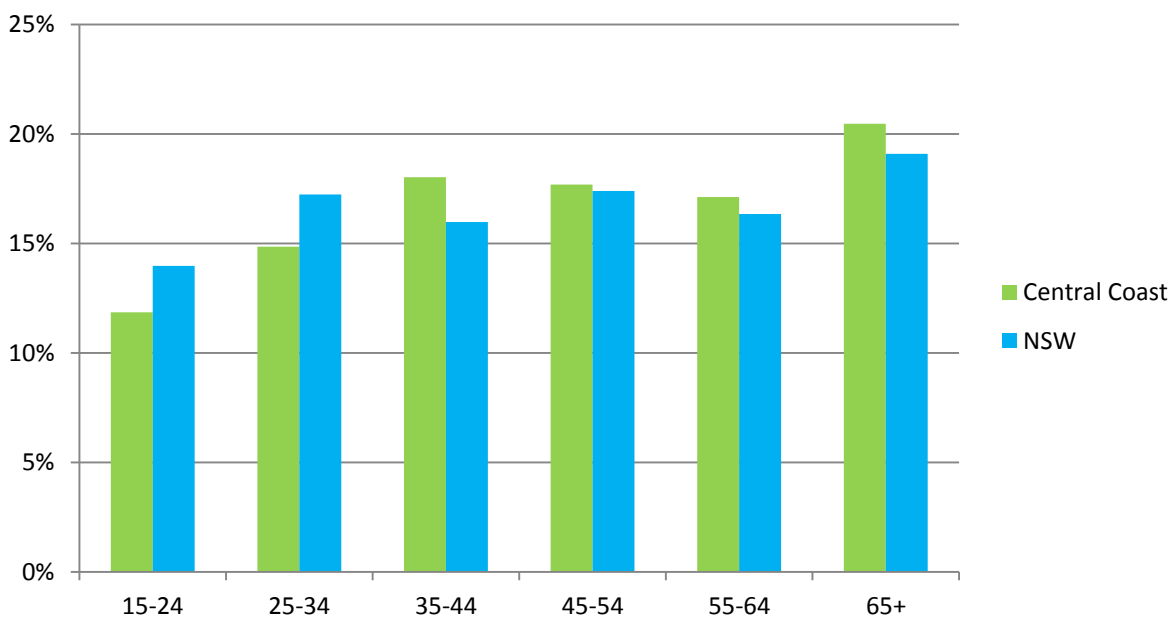
Figure H: Top 10 activities by participation rate by international visitors (left) and domestic visitors (right)



Age:

Visitors to Central Coast and NSW as a whole are fairly evenly spread across the age groups, with the majority of travellers for Central Coast and NSW being between 65+ years (See Figure I).

Figure I: Age Profile of Central Coast and NSW Domestic Visitors, YE June 2017



Travel Party:

The recorded travel parties to the Central Coast were equally distributed amongst adult couples (26%), unaccompanied traveller (28%), Family group (21%) and friends and/or relatives travelling together (21%) in 2016-2017. In comparison, business associates and tour groups accounted only for 2% and 0% respectively during this time. (Figure J).

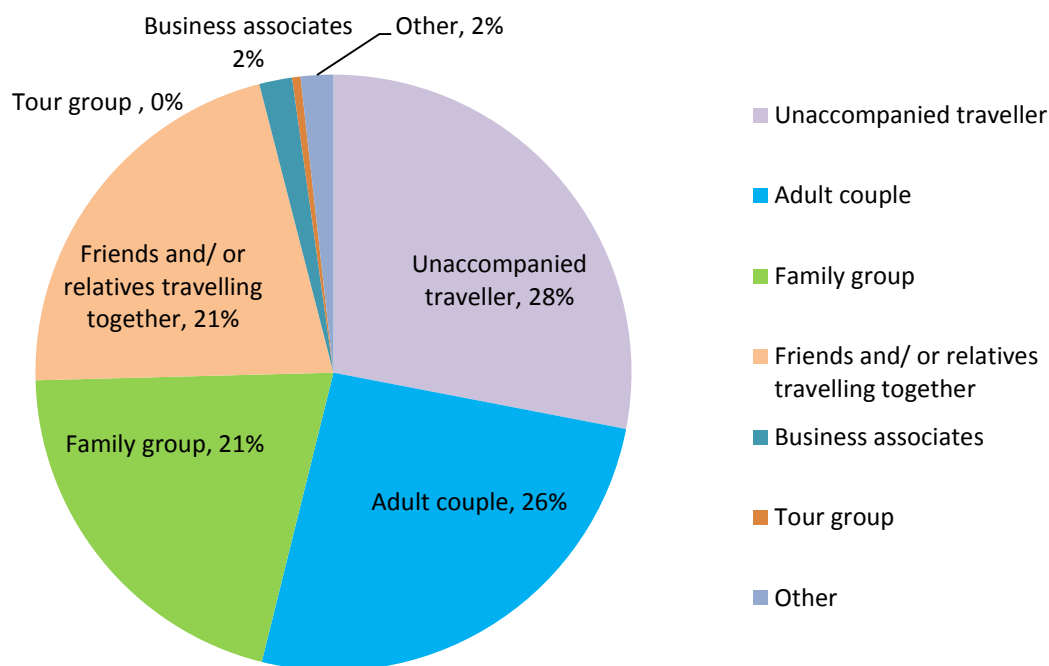
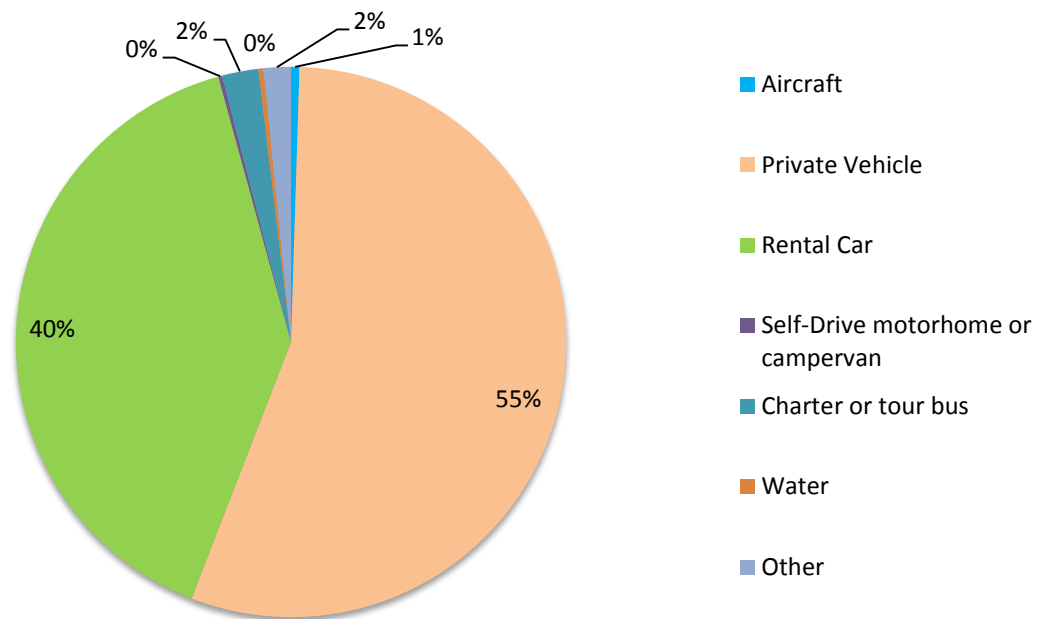


Figure J: Travel Party Profile of Central Coast Visitors, YE June 2017

Transport:

In 2016, the dominant mode of transport used to travel to and around the Central Coast was by self-drive private vehicles at 98.35%. Although aircraft only accounted for 1.3%, it has grown by 37% p.a. since 2012. Travel by rental car dropped during 2015, but is experiencing a resurgence, holding 31% of the market but growing a mere average of 1%p.a. since 2012.

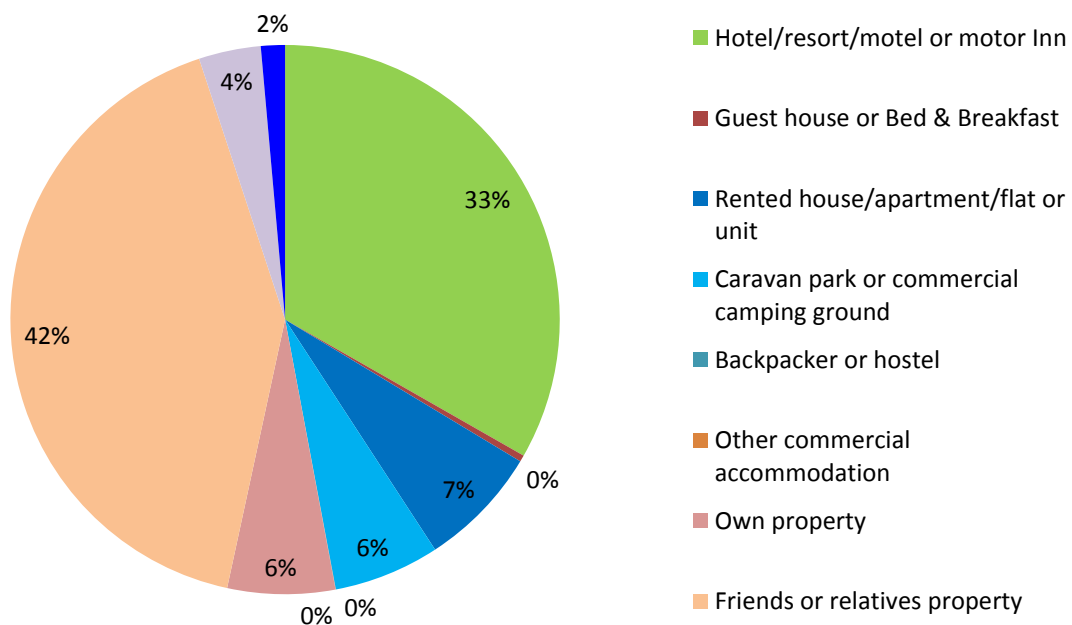
Figure K: Transport Profile of Central Coast Visitors, YE December 2012-2017



Accommodation:

While 42% of the visitors to the Central Coast stay on a friends or relatives property, 33% of the visitors stay in hotels, resorts and motels. Rented house/apartment/flat or unit and commercial caravan or camping are also popular accommodation choices amongst the visitors, accounting for 7% and 6% share each respectively.

Figure L: Accommodation Profile of Central Coast Visitors, YE June 2017



Appendix 2: Opportunities and Challenges

From analysis of visitor markets and stakeholder feedback a number of challenges are apparent.

Figure 15: Destination Challenges and Opportunities

Opportunities	Challenges
<ul style="list-style-type: none"> • Four times the waterfront of Sydney Harbour including beaches and waterways • Proximity to Sydney & Newcastle (closest beach destination within 90mins) • Natural beauty – national parks, lakes, waterways, headlands, beaches and hinterland • High-quality restaurants and café culture • Commitment and buy-in from industry • Quality (premium) accommodation product to increase diversity and encourage motivation to visit • Council amalgamation to help establish the region • Additional VFR markets and workforce availability opportunities from population growth • Enhance the appeal of Central Coast through activation of town centres, place-making and regeneration • Industry buy-in and strategic partnerships to actively work towards objectives • Key infrastructure delivery and upgrades • Leverage DNSW and align with their target markets and growth opportunities • Aging population (grey nomad markets) • Rise of social media messaging and cut-through • Product and package collaboration • Locals ‘talk it up’ & word of mouth marketing • Development of a ‘Food Industry’ with the agriculture industry and connect with industry • Collaborative industry marketing to increase curated content and promote the change of Central Coast to shift perception • Research needs of the future traveller market (i.e. millennials) • Potential for an Ambassadors Program to include locals into a VFR campaign • Need for a clear common vision, USP, branding and differentiation • Management of sacred sites • Opportunity for National Surfing Reserve or Regional Surfing Reserve accreditation 	<ul style="list-style-type: none"> • The region is losing market share of the key Sydney outbound visitor market • No distinctive or world famous features • Lack of awareness or poor perceptions of the Central Coast • Lack of a clear identity and competitive messaging • Perceived lack of work and activities to retain young people in the area • Risk in investment and re-investment in product (especially large-scale and boutique) • Funding changes and reduction in available funds and grants available to smaller, private organisations in region (marketing dollars and capital) • Research in transport forecasting and funding to build transport and connectivity between attractions • Location lends itself towards the destination being regarded as a drive through or ‘pit-stop’ region • Population has grown, but not at the same rate as jobs and infrastructure • Lack of wayfinding signage for visitors • Availability of a range of accommodation options (especially boutique and high-end) • Vulnerable to extreme weather conditions • Planning scheme integration with tourism goals • Lack of established activity and experience trails • Perception as a summer destination only, with lack of winter activities

Appendix 3: Strategies and Plans

The following strategies and plans were identified as having important implications on the Central Coast Tourism Industry as of 2016.

Plan/Strategy	Relevant Goals/Objectives/ Issues	Implications for tourism in Central Coast/ Potential Tourism Infrastructure Development Opportunities
Regional Level		
Central Coast Regional Strategy 2006 – 2031	<p>This regional strategy contains a planning framework for the deliverance of a sustainable and prosperous Central Coast by 2031. The vision for the future outlined in the document includes four key focuses:</p> <ul style="list-style-type: none"> • Prosperity – To create a competitive and adaptable economy • Sustainability – To provide an environment for current and future generations • Liveable communities – Providing opportunities, interaction and cohesion • Improved regional coordination and identity – For the effective management and coordination of human services and infrastructure as well as a strong regional identity and pride in the coast <p>The strategy ensures that development to accommodate for present and predicted population growth simultaneously maintains and enhances the regions excellent environmental quality and coastal lifestyle, for the community and tourism industry, which is a key economic sector for the Central Coast.</p>	Improve standard of tourism industry through enhanced environmental quality and coastal lifestyle as well as economic support for tourism.
Central Coast Regional Economic Development and Employment Strategy, 2009	<p>The Regional Economic Development and Employment Strategy is a long term strategy, centred around future economic development and employment growth on the Central Coast. The strategy is expected to generate new jobs which build on currently recognised advantages. The strategy will also aim to deliver a sustainable, smart and connected Central Coast which is expected to increase in population by 100,000 by 2031.</p>	Increased jobs in the tourism sector as well as the creation of better infrastructure to provide better access to tourist attractions.

	<p>The key objectives of the strategy are:</p> <ul style="list-style-type: none"> • Develop a more robust and sustainable regional economy • Deliver more than 45,000 new jobs by 2031 • Build skills for future through targeted skills programs and better learning culture • Increase level of research and innovation in the region to shape new areas for business opportunities • Ensure delivery of key infrastructure necessary to support continued employment growth • Encourage employment growth in key employment nodes • Create economic development partnerships between business and government • Provide effective mechanisms for coordinating the strategy <p>In addition to economic development and employment growth the strategy also includes the opportunity to highlight the Central Coast as a leader in sustainable building design and environmentally sensitive urban planning.</p>	
Central Coast Regional Action Plan (Under 2021)	<p>This action plan establishes immediate, prioritised actions for the New South Wales Government that complement existing regional strategies and long-term strategies in development for New South Wales. The Central Coast Regional Action Plan will deliver an integrated strategic plane for land use, transport and infrastructure investment and is committed to partnering with communities such as Aboriginal communities to improve social and economic outcomes. The goals of the plan is to rebuild the economy, return quality services, renovate infrastructure, strengthen our local environment and communities and restore accountability to government.</p> <p>In order to meet these goals the following six objectives have been set:</p> <ul style="list-style-type: none"> • Grow the economy of the Central Coast and provide sustainable employment – through partnering with local stakeholders to encourage regional economic growth and employment, supporting key regional industries and local businesses, increase productivity by cutting government red tape and revitalising town centres • Enhance skills development and educational outcomes – by engaging young people in education, partnering with businesses and educational institutes 	<p>The plan intends to invest in infrastructure improvement and promote Central Coast as a choice tourism and event destination which will have implications on the tourism industry. Increasing public transport infrastructure will encourage better connectivity between tourist attractions and accessibility.</p>

	<p>to improve links and foster additional education facilities and encourage students to further invest in education</p> <ul style="list-style-type: none"> • Improve transport connectivity and regional roads – to address traffic hotspots and increase linkages within the region, improve region’s external connections as well as public transport connectivity across the Central Coast, making public transport more attractive option • Deliver coordinated support for community, families and disadvantaged – through improving community safety, support for all family, vulnerable and disadvantage members, and reduce homelessness by improving accessibility to affordable housing • Improve access to health services and promote healthy lifestyles – through improved access to health services and promoting healthy lifestyles • Protect our natural environment by balancing between development and conservation – ensuring land use and planning support sustainable growth economically and environmentally and manage as well as protect Central Coast’s water catchment areas 	
Regional Destinations Network, 2016	<p>This strategy will create six new destination networks throughout NSW to overhaul the way regional and rural areas attract visitors. The \$43 million invest over four years will drive growth of the visitor economy in Regional NSW at the local level. The goal is to create more jobs in tourism to have flow on positive effects for regional economies and double overnight visitor expenditure by 2020.</p> <p>The objectives of destination networks will be:</p> <ul style="list-style-type: none"> • Industry engagement and industry development • Product development • Training and education • Preliminary review of local regional visitor economy fund • Collaboration with DNSW on industry activities 	Strong involvement between local tourism sector and new regional tourism division established. More funding also expected for the Central Coast region.
Central Coast Regional Plan, 2036	The Central Coast Regional Plan 2036 will guide the NSW government’s land use planning priorities and decisions over the next 20 years. It identifies economic, social and environmental opportunities to build a more prosperous region and actions to guide development and land use. The plan provides an overarching framework that	Economic growth investment has made tourism a mainstay of the economy. Protection of natural environment will increase health of tourist hotspots as well as

	<p>will guide preparation of detailed land use plans, determination of development proposals and inform infrastructure funding decisions. Four main goals are identified in the plan which are:</p> <ul style="list-style-type: none"> • A prosperous Central Coast with more jobs close to home • Protect the natural environment and manage the use of agricultural and resource lands • Well connected communities and attractive lifestyles • A variety of housing choice to suit needs and lifestyles <p>Further objectives were outlined for the four goals identified:</p> <ul style="list-style-type: none"> • Grow Gosford City Centre as the region's capital and focus economic development in Southern and Northern growth corridors • Support new and expanded industrial activity and increase job containment in the region • Protect and enhance productive agricultural land as well as protecting and managing environmental values • Sustain water quality and security while also protecting the coast and managing natural hazards and climate change • Create well planned, compact settlements and grow investment opportunities in the region's centres • Create inclusive places and align land use and infrastructure planning • Improve housing supply and choices in and around local centres addressing community needs • Manage rural lifestyles 	better connecting them to city centres.
Central Coast Telework Strategy 2014 – 2020	<p>The Central Coast Telework Strategy 2014-2020 aims to expand communications in the area to foster new workforce participants from the region to a distant employer. The goal of the strategy is to create one million days of telework on the Central Coast by 2020 to allow the workforce to work closer to home for one day a week. The key objectives of the strategy are:</p> <ul style="list-style-type: none"> • Increase awareness of Telework's benefit to employees and employers • Increase uptake and acceptability of telework by businesses to encourage international competitiveness 	<p>Increase tourist rates in Central Coast as business expand to a broader market and becoming increasingly efficient. Construction of better infrastructure for tourism also.</p>

	<ul style="list-style-type: none"> • Develop a regional network of smart work hubs • Promote positive impact of telework on the region 	
Central Coast Regional Tourism Opportunity Plan, 2013	<p>The Central Coast Regional Tourism Opportunity Plan (TOP) aims to identify and align viable catalyst tourism projects. The main aims of TOP are to:</p> <ul style="list-style-type: none"> • Identify infrastructure upgrades to support tourism growth • Identify the need for new investments for development of tourism • Provide relevant research based information on tourism • Provide mechanism for engagement with infrastructure providers and potential investors about needs for opportunities • Provide an agreed focus for infrastructure providers, private investors and tourism industry <p>TOP targets local councils, state government agencies, regional economic development agencies, the regional tourism organisation, investors and developers as well as tourism industry operators to help reverse the declining visitor numbers of the Central Coast over the past five years. In order to achieve this goal four strategic priorities were outlined:</p> <ul style="list-style-type: none"> • Activate the waterfront • Enhance and promote the sporting and recreational benefits of the Central Coast • Attract and grow major sporting, cultural and lifestyle events • Make the region more accessible 	Start rapid increases in tourist numbers to the Central Coast through catalyst projects and upgrade infrastructure to increase appeal and accessibility to tourist hotspots.
Central Coast Regional Transport Plan, 2013	<p>The Central Coast Regional Transport Plan outlined specific actions to address challenges of the Central Coast region which were raised by residents to be vital for the region's growth. The plan places priority on improving transport connections within the region and reducing travel times to key centres in surrounding regions such as Sydney. Infrastructure upgrades have also been included as part of the plan such as the interchanges on the M1 Pacific Motorway (F3) and future development of the F3 and M2 link.</p>	Improved infrastructure, stronger connectedness and greater accessibility to the Central Coast and all of its tourist attractions.

Central Coast Festival and Events Strategy, 2009	The Central Coast Festivals and Events Strategy is the long term planning document to help boost the region's economy, bring people together, improve wellbeing and provide cultural experiences. The strategy aims to leverage and grow existing events, and help develop the region to retain these events and attract new events in partnership with community organisations, stakeholders and government bodies.	Commercial, business-led and community-based events develop national and international recognition and attract major attendance numbers to the Central Coast region.
Central Coast Council Sponsorship Program 2017/18	The Sponsorship Program is an arrangement in which there is the right to associate Central Coast Council names, products or services with the sponsored organisations service, product or activity, in return for negotiated and specific benefits such as cash or in-kind support or promotional opportunities. Sponsorship involves a negotiated exchange with the end result of tangible, material and mutual compensation for the principle parties to the arrangement.	Council's Sponsorship Program aims to enhance the resources available to organisations for events and initiatives that align with council priorities.

Appendix 4: Workshop Attendees

The following industry representatives attended the workshops during November the 29th at Pullman Magenta Shores and November 30 2016, at Crowne Plaza Terrigal.

Name	Company
Con Ryan	5 Land Walk
Jennifer Kilp	Aquafun Avoca Lake
Peter Rea	Brisbane Water Hist Soc
Kreenah Yelds	Brisbane Water Hist Soc
Brad Wilson	Casar Park
Andrew Smith	Central Coast Aero Club
Chris King	Central Coast Council
Sharon Bell	Central Coast Holiday Parks
Robyne Abernethy	Central Coast Tourism
Phil Walker	Central Coast Tourism
Jacqui Greaves	Central Coast Tourism
Jo Marks	Central Coast Tourism
Melinda McCrone	Crowne Plaza Terrigal
Emma Perham	Crowne Plaza Terrigal
Tina Davies	Dept Premier & Cabinet
Stephen Byfield	Diggers at The Entrance
Gazwa Rignall	Erina Fair - Lend Lease
Sill Jackson	Ettalong Diggers
Kim Cole	Ettalong Diggers VI Centre
Patty Kolln	Forest of Tranquility
Karen Clark	Forest of Tranquility
Mary Rayner	Glenworth Valley
Len Sargent	Gosford City Chamber of Com.
Catherine Haggith	Gosford Classic Car Museum
Jan Walk	Gosford Regional Gallery
Tim Braham	Gosford Regional Gallery
Libby Bain	GVOA
Sandy Hunt-Sharman	Henry Kendall Museum
Klara Kaye	IMAG
Peter Bik	Insinc Realty and Property Mgm

Name	Company
Emma Paulley-Hughes	JC Entertainment
Glen Hale	Kids Club Childhood Centres
Russell Parsons	Little Creek Cheese
Alex Nieuwenhuys	Mantra Hotels
John Asquith	Marine Discovery Centre
Stephan Leroy	Merwre Kooindah Waters
Len Birger	Microlight Adventures
Clare Keogh	Newcastle University
Dr Lisa Barnes	Newcastle University
Jacquie Alley	Noonaweena
Joy Groves	Norah Heads Lighthouse Trust
Gary Blaschke	Northlake Disability Precinct
Jenny-Lee Scharnboeck	NSW National Parks & W
Rebecca Dawes	NSW National Parks & W
Patrick Zuluaga	PMZ Marketing
Sam Panetta	Pullman Magenta Shores
Christine Glass	Ray White Killcare
John Mouland	RDACC
Peter Brown	Reg Dev, NSW – Dept of Industry
Mark McLean	Reg Dev, NSW - Dept of Industry
Warren Hadley	Shelly Beach Golf Club
Kristy Baptista	Sherlock Software
Ray Payne	Sherlock Software
Sandy Springfield	TAFE NSW
Nicholle Henry	TAFE NSW
Samantha Barker	Terrigal Sails
Lisa Standish	Terrigal Sails
George Boyd	The Green, The Entrance
Sandrine Gaymard	Treetops
Garry Laing	Trusted Photography
Kate Wooden	Westfield Tuggerah
Marc Charette	Work pics
David Jewell	Wyong Race Club

Appendix 5: Additional Workshop Attendees

The following representatives attended an additional workshop on November 29 2017 at The Art House Wyong.

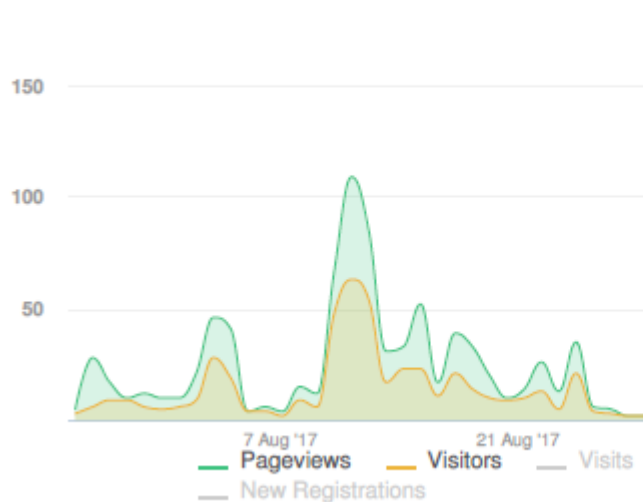
Name	Company
John Moulard	Regional Development Australia, Central Coast
Terri-Ann Walker	Destination NSW
David Douglas	Destination NSW
Deborah Warwick	Gosford Business Improvement District (GBID)
Lorraine Wilson	Central Coast Plateau Chamber of Commerce
Alison Vidler	Gosford/Erina & Coastal Chamber of Commerce & Industry
Nicole Thompson	Wyong Regional Chamber of Commerce
Janet Holmesby	Greater Toukley Vision
Kylie Yeend	NSW National Parks and Wildlife Service
Andrew Bayley	NSW National Parks and Wildlife Service
Bill Jackson	Ettalong Diggers & The Peninsula Chamber of Commerce

Appendix 6: Public Exhibition Summary

The following overview is a summary report of the Destination Management Plan public exhibition period which occurred between August 1 and 18 2017 on the Your Voice Our Coast web platform.

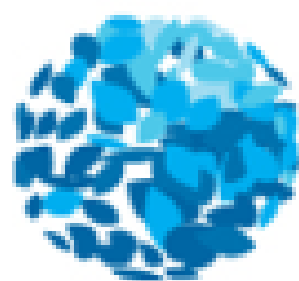
SURVEYS SUMMARY		TOP 3 SURVEYS BASED ON CONTRIBUTORS	
2	Surveys	25	7
29	Contributors	Contributors to	Contributors to
32	Submissions	I'd like to be part of further consultation on Tourism on the Central Coast	Public Exhibition Submission - Draft Destination Management Plan

Visitors Summary



Highlights

TOTAL VISITS	MAX VISITORS PER DAY	
512	63	
NEW REGISTRATIONS		
0		
ENGAGED VISITORS	INFORMED VISITORS	AWARE VISITORS
29	89	427



EARTHCHECK