

Central Coast Destination Management Plan for Tourism 2010 to 2013



"Experience the lifestyle and opportunity of the Central Coast" June 2010



02 Foreword

I am pleased to present the first ever Central Coast Destination Management Plan (DMP) which identifies an agreed vision for the direction of the tourism industry on the Central Coast for the next three years.

Visitor expenditure is valued at over \$750 million annually to the Central Coast region and directly employs approximately 6,000 people. In recent times, overnight visitation to our region has decreased, triggering the need for a new direction and a bold vision.

In order for the Central Coast tourism industry to progress and remain competitive, the region requires a strong, united strategic direction to lay down a vision for its future. The Central Coast Destination Management Plan for tourism fulfils this requirement and for the first time successfully brings together a holistic approach to the destination.

I look forward to working through the implementation phase of the plan over the next few years and encourage all tourism businesses on the Central Coast to use it in their own business planning processes.

The Central Coast Destination Management Plan (DMP) is the first strategic plan for tourism on the Central Coast developed in partnership with the tourism industry that identifies the vision, goals and priority strategies for the destination over the next three years.

It has been developed in partnership with local government, the tourism industry, the Central Coast Tourism board and staff, and other tourism stakeholders through multiple destination management workshops, face to face interviews and online surveys, consulting over 120 stakeholders in the process.

The Central Coast Destination Management Plan for tourism will increase the recognition of tourism as a major source of economic and regional development by government and the private sector, assist with the alignment of local, regional and state strategies affecting the tourism industry, and serve as a useful tool for tourism operators, researchers, investors and stakeholders in their own planning efforts.

Central Coast Tourism would like to thank all stakeholders who were involved in the planning process and looks forward to working in partnership with the industry to implement this plan.



B Lawler

Barton Lawler
Chairman
Central Coast Tourism, Inc
June 2010



Oliver Philpot

Oliver Philpot
Chief Executive Officer
Central Coast Tourism, Inc
June 2010



About the Central Coast

The Central Coast is located in a unique position midway between two major Australian cities. It is just over an hour north from the heart of Australia's largest city, Sydney, with a population of more than four million people, while less than an hour south of one of Australia's most vibrant cities, Newcastle, with a population of approximately 612,000.

The Central Coast is well known for its outstanding environmental qualities and lifestyle. The region is home to approximately 316,000 people and is tipped to grow at one of the fastest rates in New South Wales (NSW Dept. of Planning, 2008) with over 100,000 new residents planned by 2031 which means new jobs are needed.

The Central Coast has experienced a steady decline in visitor numbers and nights since 2007. Central Coast Tourism, in responding to this decline, identified the need for a Destination Management Plan (DMP) to provide a clear direction to reverse the trend. This DMP takes a holistic approach to developing appropriate tourism strategies that contribute to the livability and the prosperity of the region without compromising its future. It will be the central reference point for the development and delivery of tourism product and services and the implementation of marketing strategies for the Central Coast.

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Executive Summary

In response to the changing, dynamic tourism business Central Coast Tourism (CCT) has embarked on a new process of strategic planning. The process considers the alignment and cohesion of corporate business with the needs of the tourism industry and key industry stakeholders. The outcome of the process provides a new perspective on tourism industry leadership for the destination.

In practical terms, this strategy is being delivered through the production of a Destination Management Plan (DMP). Drawing on available research and a broad base of knowledge, skills and experience, the DMP is tailored to meet the development and marketing needs of each destination and tuned to meet the needs of target markets.

This document represents the outcome of destination management planning for the Central Coast, New South Wales, Australia.

Vision

The Central Coast will be recognised as New South Wales' premier waterfront lifestyle destination.

Strategic Priorities	Priority Project
■ Activate the waterfront	Review of planning scheme effects on waterfront tourism and community development
■ Enhance and promote the lifestyle and culture of the Central Coast	Build local pride with marketing and VFR campaign
■ Attract and grow hero, business and tourism events	Develop a Central Coast Events Strategy
■ Improve partnerships and accessibility	Regional Tourism Awards Program in partnership with Chamber of Commerce

Our Goals	Measures of Success
■ Increase repeat visitation by off-peak season travellers for short breaks	Increased visitor nights
■ Attract more outdoor, active affluent and off-peak season travellers for short breaks	Increased visitor expenditure
■ Deliver a quality visitor experience that is differentiated & competitive against Mid North Coast, Hunter Valley, Blue Mountains & South Coast	Grow our share of Sydney short breaks
■ Create a positive destination image through a unified regional brand and campaign	Increased brand awareness and brand health
■ Promote the Central Coast as a place to live, work, invest and visit	Population growth and employment

Enablers of Success		
■ Brand Development	■ Infrastructure and Investment Plan	■ Events Strategy
■ Pacific Coast Touring Route	■ Strategic Alliances	



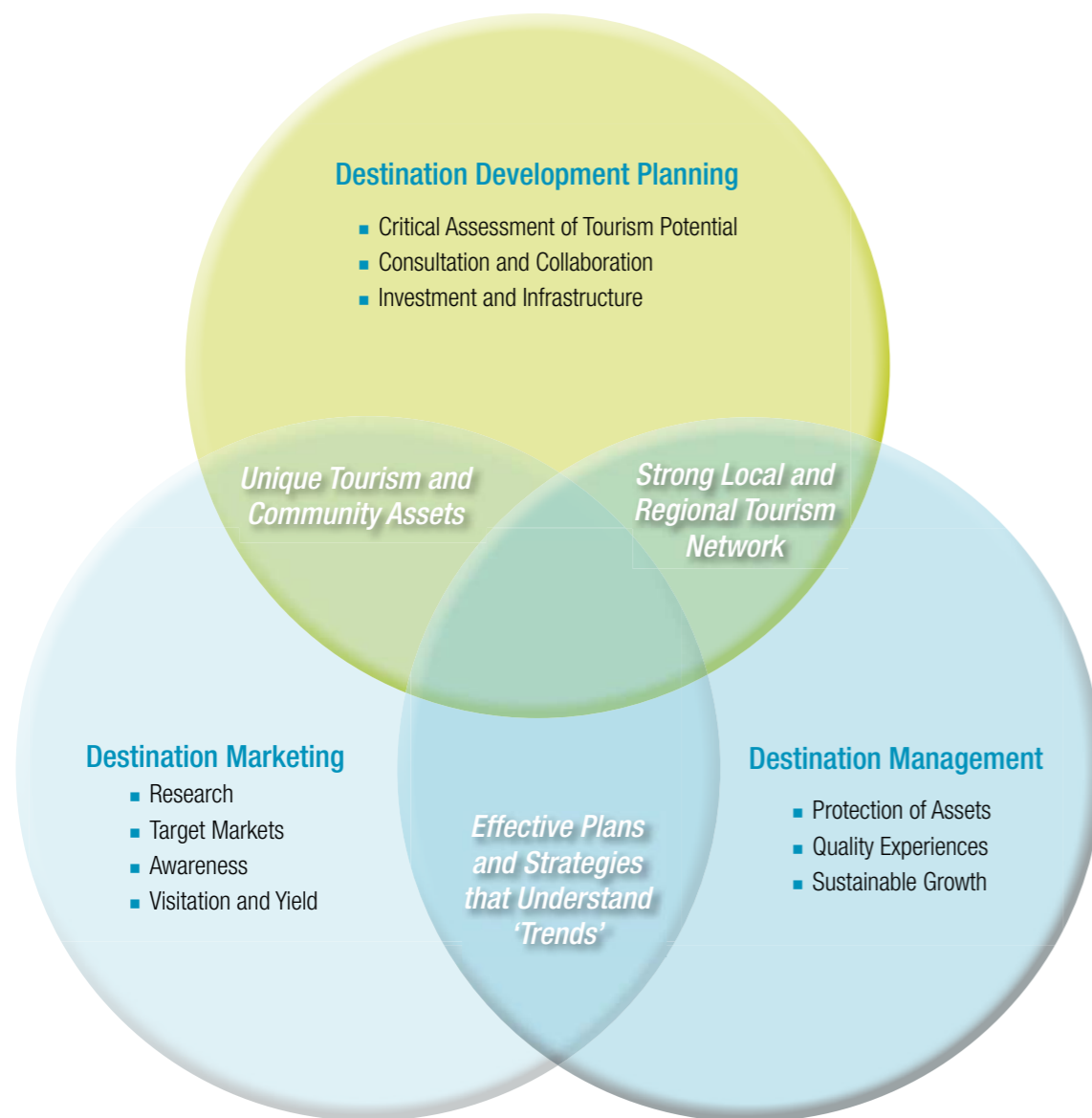
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Destination Management Planning Model

Destination Management Planning incorporates not only marketing initiatives, but also, product development strategies (which includes what is commonly referred to as both hard and soft product development), industry development strategies, research and industry engagement.



Destination Management Planning - An Overview

Key Features

Best practice DMPs establish a vision and set strategic objectives that:

- Clearly contribute to achieving the vision
- Are realistic, achievable and measurable
- Take a holistic and integrated approach
- Identify global forces that may impact the destination
- Include short, medium and long-term actions
- Deliver economic benefits
- Align with community aspirations
- Strengthen environmental management
- Facilitate continual improvement (capacity building)
- Encourage innovation and facilitate collaboration
- Support the development of risk management
- Encourage political will for an ongoing, progressive and innovative approach

The difference is made in open and honest communication and matching the unique assets and the people in the tourism network to the trends and opportunities and by prioritising our effort.

Destination Management Planning provides a tourism organisation with the tools to produce sustainable and competitive tourism in a destination. It is organised around a destination's unique tourism assets and unique development, marketing, and management needs.

Destination Management Planning is a step forward from traditional destination marketing roles and provides a more holistic and integrated approach to understanding the tourism potential of each destination, and the best methods of maximising that potential.

Destination Management Plans (DMPs) are developed after a comprehensive process of research within the destination, consultation, feedback, planning and review. Grass roots level participation from local tourism organisations, tourism boards, local government and operators is essential in the preparation of DMPs. DMPs should be linked upward to State/Territory level strategic tourism plans.

Destination Management Planning is an evolution of the destination marketing initiative and represents a more integrated approach to understanding destination needs and the delivery of services. It is intended that the DMPs will directly link with Tourism NSW's annual business plans and provide a strategic platform to guide the strategies and business plans of industry stakeholders.

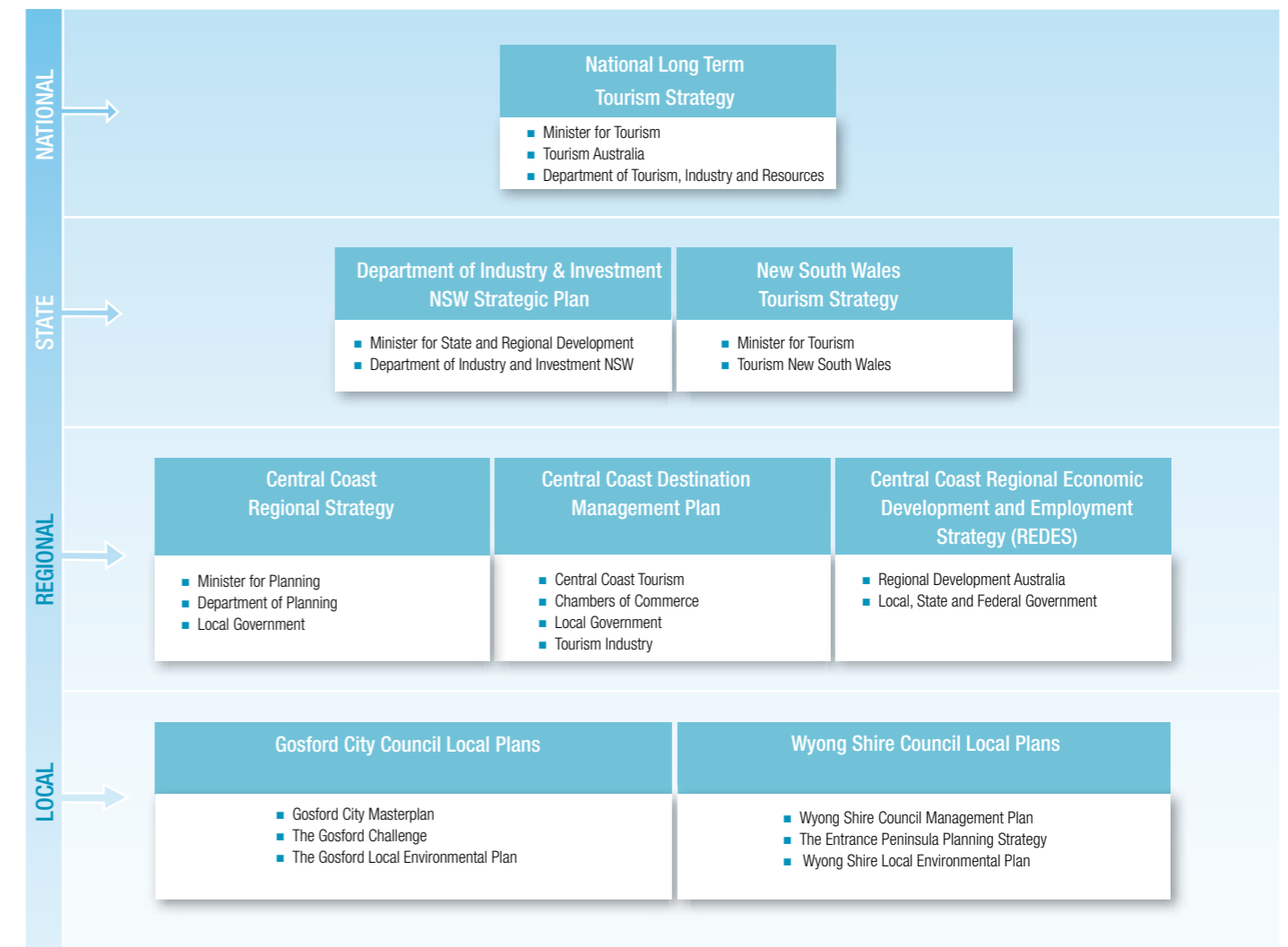
The potential benefits for destinations, communities, business operators and tourism agencies that can be achieved through an effective and consistent approach to Destination Management include:

Benefits of Destination Management Planning

<ul style="list-style-type: none"> Improved Destination Competitiveness 	<ul style="list-style-type: none"> Increased destination appeal resulting in increased visitation and yield Advantage over other destinations Ongoing investment in tourism
<ul style="list-style-type: none"> Increased Visitor Satisfaction 	<ul style="list-style-type: none"> Delivering on the brand promise Increased repeat visitation Enhanced destination reputation
<ul style="list-style-type: none"> Economic, Social and Environmental Sustainability 	<ul style="list-style-type: none"> Increase in tourism's contribution to destination's economy Community support for tourism development Controlling tourism's environmental impacts Long term industry viability
<ul style="list-style-type: none"> Effective Partnerships 	<ul style="list-style-type: none"> Strong partnerships (community, industry, government, development agencies, etc): <ol style="list-style-type: none"> Avoiding duplication of resources Bringing a focus to developing the full visitor experience from arrival through to departure Increasing the profile of tourism in regional destinations Minimising conflicts between tourism and other sectors
<ul style="list-style-type: none"> Continuous Improvement 	<ul style="list-style-type: none"> This Framework encourages the implementation of DMP as a process of continuous improvement rather than a once off "set-and-forget" activity. The benefits include: <ol style="list-style-type: none"> Early awareness of emerging trends Development of innovation and new technology Constant refreshing of destination brand

Central Coast Tourism provides leadership and guidance to the region's tourism industry and delivers the region's tourism agenda through an integrated approach to tourism policy, destination development and marketing.

Destination Management Planning for the Central Coast occurs in the context of the National Long Term Tourism Strategy, the New South Wales Tourism Strategy, other State Government Strategies such as the Department of Planning's Central Coast Regional Strategy and a variety of Local Government planning instruments.



Key Points:

- The Central Coast Destination Management Plan is the strategic plan for tourism in the destination (not the organisation).
- It outlines the vision, goals and strategies for the destination and provides background information on how these were developed.
- The 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.

Visitor expenditure in the Central Coast is valued at over \$750 million dollars annually (Tourism Research Australia, National Visitor Survey, year ended December 2009) and the local tourism industry employs approximately 6000 people.

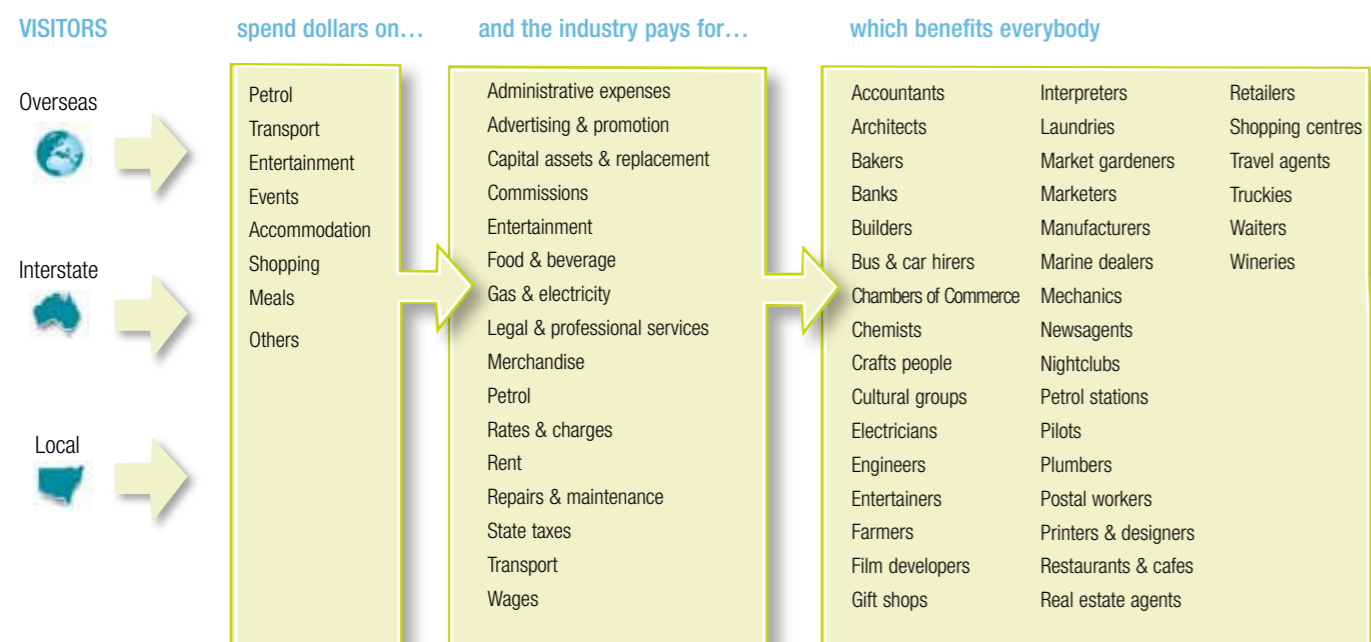
The Regional Economic Development and Employment Strategy (2009) and the Central Coast Regional Strategy (2008) identify tourism as an important sector to the region contributing significantly to the local economy.

The role of tourism in the Central Coast's economic future has been articulated through the following initiatives:

- Drive the development of a **unified brand and identity** for the region and coordinate marketing messages. Tourism will play a key role in defining "our" Central Coast. The story and the brand can be built through tourism.
- Promote the Central Coast's **outstanding environmental qualities and lifestyle** to investors, workers and locals. Through events and PR, tourism will showcase these qualities to locals and visitors.
- Leverage its 'natural advantage' being located between Sydney and Newcastle with the opportunity to develop the waterfront. Tourism will be a key driver in the **development of quality waterfront** amenities – which will in turn generate customers and give quality of life to locals.
- Attract and retain the **18-29 year old population cohort**. Create and promote jobs for young people.
- Diversify and support the economy to grow 'locally' by **building local pride**. Tourism should assist in the development of attractions and more vibrant centres for both locals and visitors.
- Identify opportunities and feasibility for new businesses and support necessary **investment attraction** to grow the region's population by 100,000 in 2031⁴.
- Leverage **grant funding** utilising the Central Coast DMP.
- Sustain local businesses **mid-week** during their quiet time.

Tourism supports one in 20 jobs in NSW⁵. Tourism employment is spread across many industry sectors including retail, cafes and accommodation, manufacturing, education and transport. In particular, tourism is an employer of young people and provides the impetus for the development of community infrastructure and services.

Benefits of Tourism to the Local Economy



⁴Regional Economic Development and Employment Strategy (2009) The Central Coast of NSW A Sustainable Smart and Connected Region.
⁵ TTF (2008) Tourism National Tourism Employment Atlas.



Destination Overview

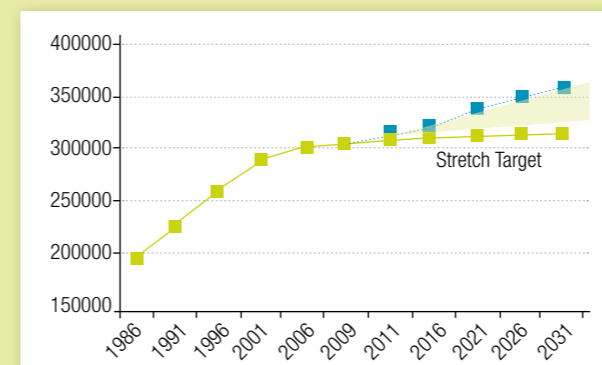
Economic Profile

The economic base of the Central Coast is varied and covers many sectors with no single industry being dominant. Key economic sectors include manufacturing, retail, agriculture, tourism, construction and service industries such as health, community services and property and business services. Sectors expected to experience strong growth over the next 25 years include wholesaling, retailing, property and business services, tourism, health services, cultural and recreational services and personal services.

The proportion of the adult workforce commuting out of the region for work has increased to over 25 per cent, resulting in a range of specific infrastructure and social challenges.

Tourism plays an important role in the region's mixed economy with the largest sectors being retail, manufacturing, property and business services, and health and community services. The tourism industry provides an essential income to local retail businesses to support their sustainability.

Figure 1: Central Coast Population Projections



¹ The Adams Ultimate Guide to Business (2009) Central Coast Investment Prospectus.
² NSW Dept. of Planning (2008) Projected growth
³ Tourism Research Australia (2009) National Visitor Survey and International Visitor Survey

The Central Coast is located in a unique position midway between two major Australian cities. It is just over an hour north from the heart of Australia's largest city, Sydney, with a population of more than four million people, while less than an hour south of one of Australia's most vibrant cities, Newcastle, with a population of approximately 612,000.

The region covers an area of 1,854 square kilometres^[1] of which 80% remains 'natural' and undeveloped, managed by two of the largest Local Governments in NSW, Gosford City and Wyong Shire.

The Central Coast is well known for its outstanding environmental qualities and coastal lifestyle. It also has the advantage of being located between the Global City of Sydney, the Regional City of Newcastle and the Lower Hunter Region. The region is home to approximately 316,000 people and continues to grow at one of the fastest rates in New South Wales².

The Central Coast offers an attractive lifestyle and is a recognised tourist area. The region's 316,000 residents enjoy a combination of city advantages with high amenity coastal, suburban and rural lifestyles.

Perhaps the greatest challenge is to create local job opportunities to match labour force growth, whilst protecting the region's natural environment. The region has set the target to create 35,000 new jobs over the next 25 years to help ensure a robust and adaptable economy.

The Central Coast has been a 'leisure and health' retreat for Sydney residents since the rail line was connected in 1889. Booming in the 1970's and 1980's the region's growth has plateaued and the region now faces declining visitor numbers and negative perceptions in its primary target market, Sydney.

With over 625 km of water frontage (lakes, rivers and beaches) in the region the Central Coast has not leveraged its natural advantage with an absence of strong waterfront product and facilities for locals and visitors.

The National Highway both links and divides the region, and its proximity to Sydney provides easy short break access while facilitating over 30,000 commuters travelling for work in Sydney each day. Creating local employment and retaining young people (18 – 29 years) remains a key challenge for the region. While promoted as one area, the Central Coast is made up of a number of discrete precincts (see appendix 4).

Attributes	Strengths	Weaknesses
<ul style="list-style-type: none"> Winner Australia's Cleanest Beach 2007 Voted one of the Top 10 surf beaches in the World Over 625 km of water frontage (More than two times that of Sydney Harbour) Land use is 80% natural 	<ul style="list-style-type: none"> More than two times the waterfront of Sydney Harbour including beaches and waterways Proximity to Sydney & Newcastle (closest beach destination within 90 mins) Natural beauty – national parks, lakes, waterways, headlands, beaches and hinterland 	<ul style="list-style-type: none"> Significantly less accommodation than Hunter and South Coast No unique or world famous features Lack of awareness or poor perceptions of the Central Coast
Challenges	<ul style="list-style-type: none"> Weather patterns – moderate and pleasant year round Festivals and events 	<ul style="list-style-type: none"> Lack of critical mass – mostly small operators Lack of a clear identity – stuck in the middle Perceived lack of work and activities to retain young people in the area
<ul style="list-style-type: none"> Creating a 'unified' identity to galvanise local efforts Managing growth (population and visitors) Attracting high value residents and businesses Protecting and improving the environment Retaining the lifestyle and the youth (18-29) Building on key strengths and addressing weaknesses 		

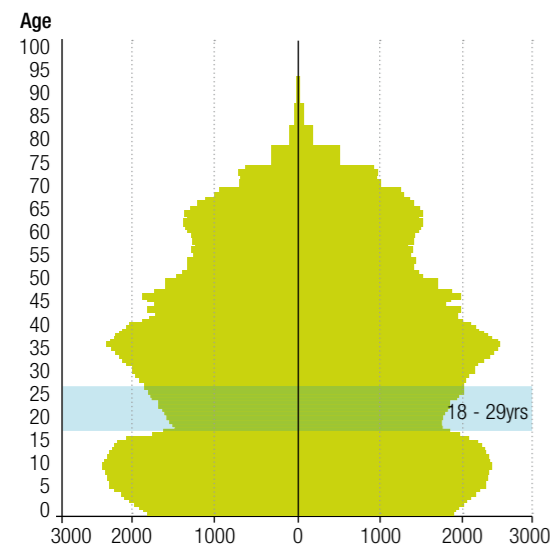


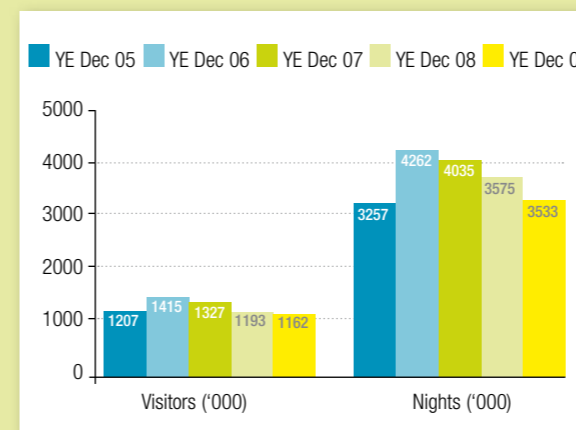
Figure 2: Central Coast Population Trends
Up to 50% of hospitality workers are under 35 yrs



Domestic Overnight Travel (YE Dec 2009)

Central Coast received nearly 1.2 million domestic overnight visitors - down by 2.6% on YE December 2008.

Visitors spent over 3.5 million nights in the region - down by 1.2% on YE December 2008



The Central Coast has experienced a steady decline in visitor numbers and nights since 2007.

The Central Coast received approximately 1,162,000 visitors and 3,533,000 domestic visitor nights in 2009. The domestic overnight visitors were down by 2.6% on the previous year and the visitor nights were down by 1.2% on the previous year. The average length of stay in 2009 was 2.9 nights (down from 3.0 in 2007).

The State share of visitors (7.3%) was maintained, but share of nights was down by 0.4%. The majority of visitors (88.7%) and visitor nights (85.4%) are from those living within NSW. Sydney accounts for 61% of all visitors to the Central Coast⁶.

The Central Coast is where 11% of Sydney visitors go and the destination has maintained its share of Sydney visitors (but lost ground to Hunter, Mid North and South Coast) and their spend is lower in Central Coast than in most nearby regions.

Central Coast received 33,200 international overnight visitors - up by 7.5% on the previous year, however it represents only 3% of total visits. Accommodation takings are up 20% and 2010 is looking stronger.

International Overnight Travel (YE Dec 2009)

Central Coast received 33,200 international overnight visitors - up by 7.5% on YE December 2008.

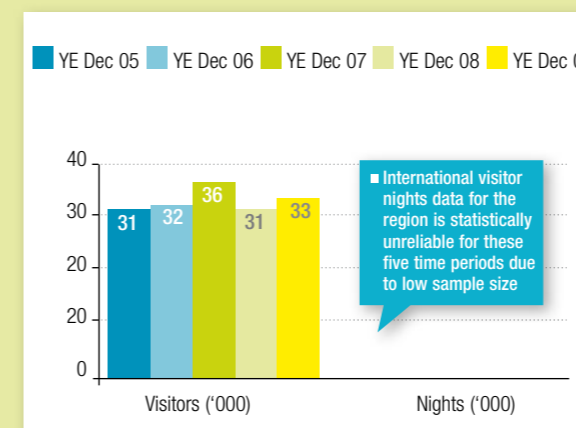
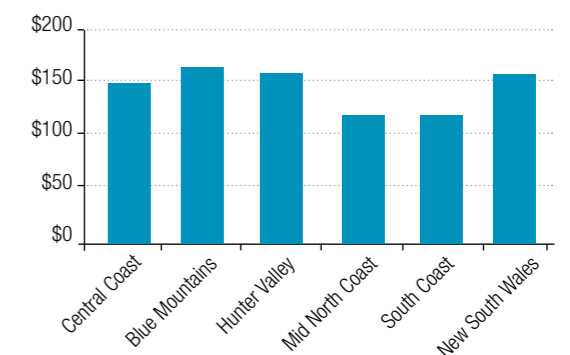


Figure 4: Average Domestic Overnight Visitor Expenditure (2009)



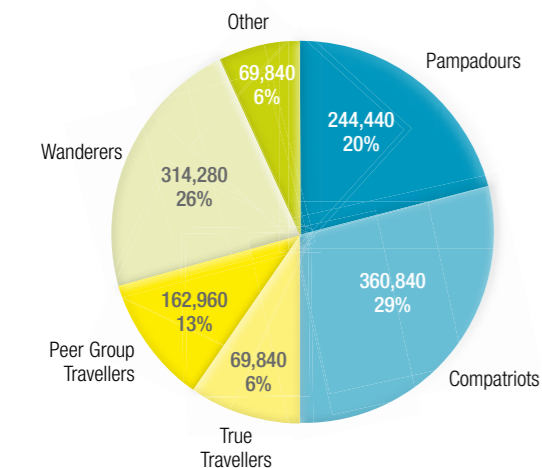
⁶Tourism Research Australia (2009) National Visitor Survey and International Visitor Survey, Central Coast

Traveller Types

- Tourism NSW uses a series of Traveller Types in its marketing strategies. In 2000, See Australia conducted a study into 'holiday mindsets' ie, Traveller Types, based on a 'state of mind' rather than on specific demographics alone.
- From this research, five holiday mindsets were derived: Pampadours, Compatriots, Wanderers, True Travellers and Groupies.
- The primary market visiting the Central Coast are Compatriots. The secondary markets are Wanderers and Pampadours.
- Compared with NSW, the Central Coast gets more Compatriots (3%) and less Peer Group Travellers (3%).

Who Visits the Central Coast?

Refer to Appendices 1 and 2 for the descriptions of segments, and complete SWOT Analysis.



6 Tourism Research Australia (2009) National Visitor Survey and International Visitor Survey, Central Coast

With 3,533,000 domestic nights spent in region and \$143 spent per day, domestic overnight tourism contributes almost \$506 million to the local economy annually⁷.

⁷ Tourism Research Australia (2009) National Visitor Survey and International Visitor Survey, Central Coast

Central Coast Segments

Based on the Tourism NSW Traveller Types the following target markets have been defined for the Central Coast:

- **PRIMARY: Compatriots (29%)**
Quintessentially middle market, female skew, want DFY (do-it-for-you) but forced to compromise, family-focused, role-driven, good shoulder market, activities focused, budget conscious, like resorts and don't like camping, favour 3-star but aspire to 5-star, self-contained an advantage.
- **SECONDARY: Wanderers (26%)**
Adult couples, empty nesters, frequent tourists, DIY, great off-peak market, keen observers, wide range of preferences in transport, favour difference, continue 'Darby & Joan' lifestyle when travelling, like to potter.
- **Pampadours (20%)**
Up-market, DFY (do-it-for-you), indulgent, female skew, white collar/ professional skew, overseas travel frame of reference, fashion-conscious, travel in couples, 5-star preference, avoid young children/family destinations.

The majority of visitors to the Central Coast are travelling for holiday or leisure (52%) or visiting friends and relatives (41%). Staying in a friend's or relative's property is the most common form of accommodation (44%) followed by campground (15%), hotel / motor inn (10%) and a rented house / apartment / flat (10%).

The majority of visitors (89%) to the Central Coast travel in their own or company vehicle; this is above the state average of 78%.

The Central Coast is currently positioned on the segmentation wheel in the centre with a slight skew towards the Compatriots and Wanderers segments with these segments demonstrating the higher propensity for visitation.

Although each precinct within the Central Coast is positioned differently they make up the segments within the broad area on the segmentation wheel. Some precincts are more luxury focused whilst others are more family focused.

Central Coast's precincts are all looking to attract a more 'active' tourist with most of their predicted growth in the higher spending 'self' focused travellers.

Peer Group Travellers

- Younger male and student skew, DIY (excluding cooking), travel with peers in peak periods, strong repeat visitation, fairly physical, want 'bright lights' and party time, limited budgets, share accommodation / transport.

True Travellers

- Experimental, adventurous, trail-blazing, immersion travellers who want to experience a single destination in depth, active, overseas orientation, seeking difference and challenge, opinion-leaders, white collar and male skew, take longer holidays, will spend more getting there than being there, definitely DIY.

Pampadours

- Up-market, DFY (do-it-for-you), indulgent, female skew, white collar/professional skew, overseas travel frame of reference, fashion conscious, travel in couples, 5-star preference, avoid young children/family destinations.

Wanderers

- Adult couples, empty nesters, frequent tourists, DIY, great off-peak market, keen observers, wide range of preferences in transport, favour difference, continue 'Darby & Joan' lifestyle when travelling, like to potter.

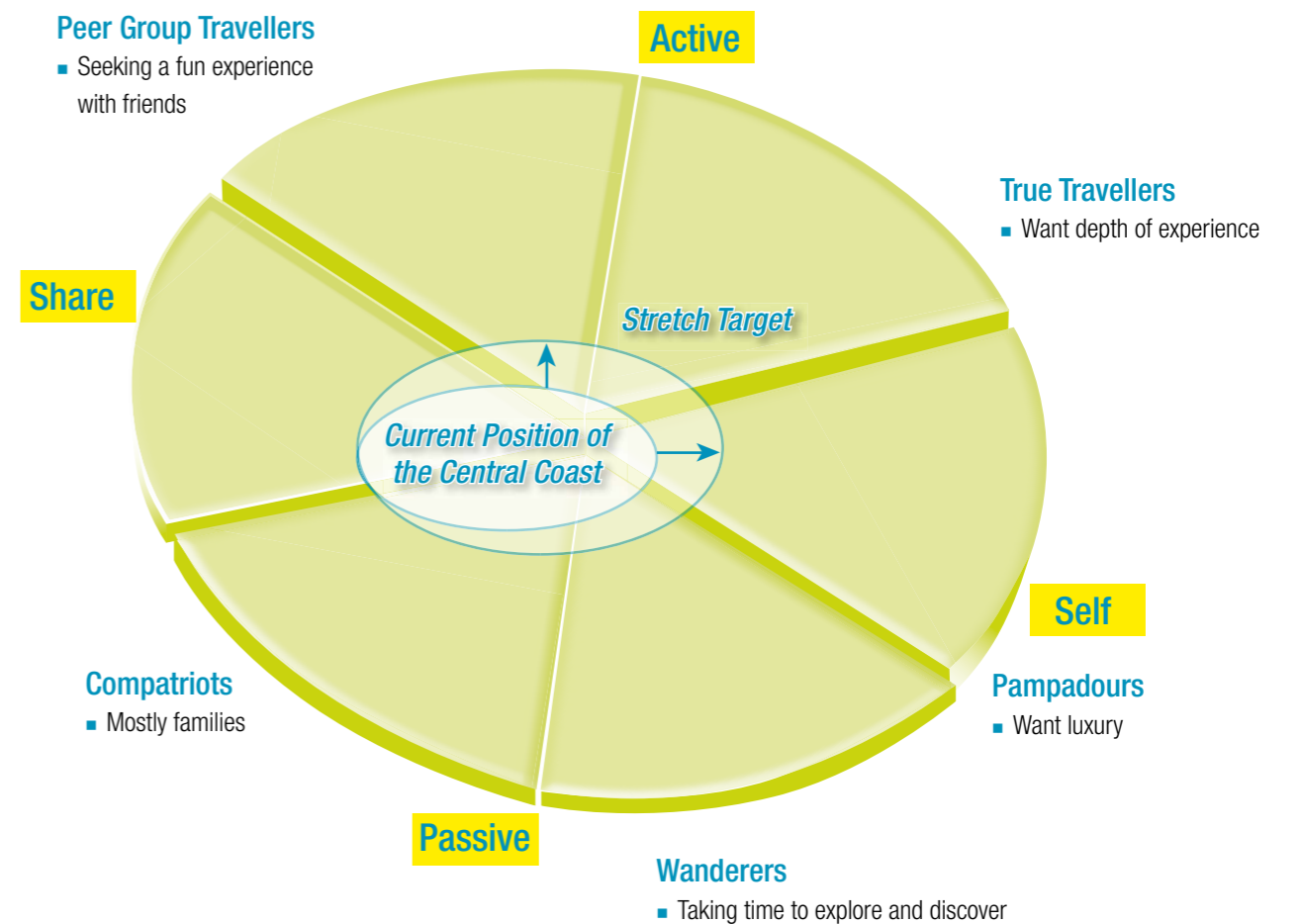


Figure 1: Short Breaks Sydney Competitors



A review of tourism expenditure across the regions shows that the Central Coast receives fewer visitors but they stay longer than they do in the Hunter Valley.

With 61% of visitors to the Central Coast coming from Sydney and almost 90% from NSW, the region's primary competitors are local. Based on a radius of 200km from Sydney, the key competitors are: Mid North Coast, Hunter Valley, Blue Mountains and the South Coast.

Of these regions, all are targeting the same market segments (Compatriots and Wanderers) as the Central Coast with the exception of the Hunter Valley who is also targeting Pampadours.

The Central Coast has a wide range of both active and passive experiences. The hero experiences are:

Theme	Experiences
Nature	<ul style="list-style-type: none"> Visiting the National Parks, cleanest beaches, bike tours, where five waterways meet, and breathtaking scenery
On the Water	<ul style="list-style-type: none"> Diving, fishing, canoeing, cycling on the waterfront, coastal walks, waterfront dining, yacht charters, ferry rides
Lifestyle and Culture	<ul style="list-style-type: none"> Space to breathe, regional yet cosmopolitan, waterfront and the real Australia.
Wildlife	<ul style="list-style-type: none"> Whale watching, pelican feeding, bird watching, interaction with Australian wildlife
Events and Festivals	<ul style="list-style-type: none"> Sporting, cultural, tourism, education, and community events
Adventure	<ul style="list-style-type: none"> Micro gliding, surfing, kayaking, climbing, biking, horse riding, team building



Tourism Infrastructure

Accommodation

In comparison to its competitors, the Central Coast has significantly fewer accommodation establishments with less than 1/2 the number of hotels, motels and guest houses of the Hunter Valley and South Coast.

Tours

A review of the Tourism NSW website shows that the region has 50 tours available online, including surfing, diving, ferries, golf and many more. This is fewer than its competitors: South Coast (136), North Coast (213), Hunter (63), and Blue Mountains (75).

Attractions

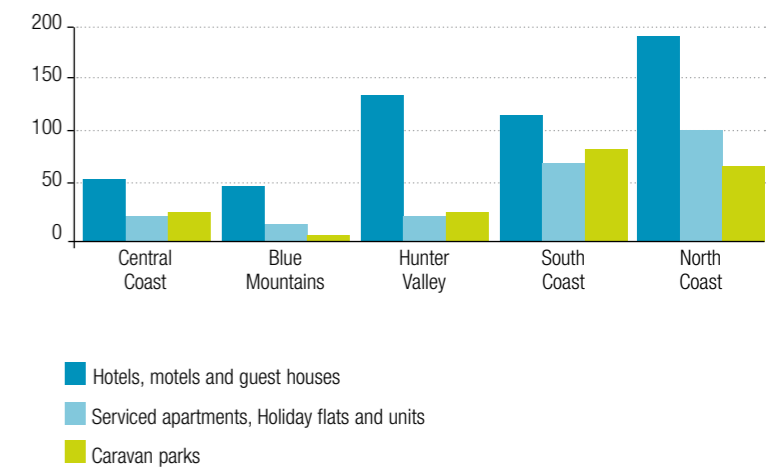
Central Coast has 113 attractions ranging from on the water activities, adventure activities and wildlife and nature attractions. In comparison with its competitors, the Central Coast has fewer attractions, South Coast (389), North Coast (660), Hunter (147) and Blue Mountains (181).

Events

The Central Coast promotes 29 events through their Official Holiday Guide. The events are spread across the region and range from markets (farmers and arts and crafts), to festival (film, food and wine and music) and the Mariners home games and the waterfront festival. Central Coast has fewer events than its competitors – South Coast (52), North Coast (133), Hunter (65), Blue Mountains (35).



Figure 5: Accommodation Establishments





18 Visions and Goals

Measures of Success

- ✓ Increased visitor nights
- ✓ Increased visitor expenditure
- ✓ Grow our share of Sydney short breaks
- ✓ Increased brand awareness and brand health
- ✓ Population growth and employment

The following section reflects the sustainable tourism aspirations for the Central Coast over the next three years.

Our Mission
Challenge outdated perceptions of the Central Coast by encouraging nature based visitors to experience the lifestyle and opportunity of the region first hand.

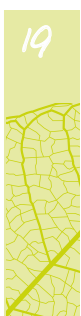
Our Vision
The Central Coast will be recognised as New South Wales' premier waterfront lifestyle destination.

Our Goals

- Increase repeat visitation in the off-peak season
Measure: increased visitor nights
- Attract more outdoor, active and affluent nature based travellers for short breaks
Measure: increased visitor expenditure
- Deliver a quality visitor experience that is differentiated and competitive against Mid North Coast, Hunter Valley, Blue Mountains and the South Coast
Measure: grow our share of Sydney short breaks
- Create a positive destination image through a unified regional brand and campaign
Measure: increased brand awareness and brand health
- Promote the Central Coast as a place to live, work, invest and visit
Measure: population growth and employment

Destination Blueprint

OUR OBJECTIVES	COMPETITIVE SET	THE WAY WE DO THINGS	WHAT WE DELIVER	WHO WE DELIVER TO	BRAND LINKS
<p>Regional Positioning</p> <ul style="list-style-type: none"> ■ The Central Coast is the ideal waterfront destination for short breaks from Sydney and Regional New South Wales <p>International Positioning</p> <ul style="list-style-type: none"> ■ Central Coast will be a primary destination within the context of the Pacific Coast Touring Route <p>Brand Vision</p> <ul style="list-style-type: none"> ■ The Central Coast will be recognised as New South Wales' premier waterfront lifestyle destination <p>Brand Insight</p> <ul style="list-style-type: none"> ■ The Central Coast offers uncomplicated and accessible holiday options and is perfect for repeat short break visits 	<p>Core Competitors:</p> <p>Primary</p> <ul style="list-style-type: none"> - Mid North Coast - South Coast <p>Secondary</p> <ul style="list-style-type: none"> - Hunter Valley - Blue Mountains - Northern Rivers <p>Tertiary</p> <ul style="list-style-type: none"> - Interstate short break destinations - International short break destinations <p>Other</p> <ul style="list-style-type: none"> - Industries attracting discretionary spending 	<p>Brand Values</p> <ul style="list-style-type: none"> ■ Welcoming ■ Healthy ■ Active ■ Accessible ■ Optimistic <p>Brand Personality</p> <ul style="list-style-type: none"> ■ Warm ■ Friendly ■ Easy ■ Familiar ■ Adventurous ■ Sharing ■ Playful ■ Unpretentious <p>Essence</p> <ul style="list-style-type: none"> ■ Waterfront 	<p>Attributes</p> <ul style="list-style-type: none"> ■ Abundant waterfront ■ Beach/marine culture ■ Natural wonders ■ Wildlife experiences ■ Adventurous spirit ■ Accessibility ■ Healthy living ■ Active/outdoors ■ Climate ■ Entertainment ■ Events <p>Core Benefits of a Central Coast Holiday</p> <ul style="list-style-type: none"> ■ Revitalisation ■ Reconnection ■ Shared moments 	<p>Target Audience</p> <p>Primary Market</p> <ul style="list-style-type: none"> - Sydney <p>Secondary Market</p> <ul style="list-style-type: none"> - Regional/Country NSW <p>Tertiary</p> <ul style="list-style-type: none"> - Interstate/International - UK, NZ, USA, Europe <p>Niche Markets</p> <ul style="list-style-type: none"> - Sporting Groups - Educational Groups - Seniors Groups - Conference Groups - Business Tourism <p>We Currently Attract</p> <ul style="list-style-type: none"> ■ Compatriots ■ Wanderers <p>We want to attract more</p> <ul style="list-style-type: none"> ■ Peer Group Travellers ■ True Travellers 	<p>Brand Links</p> <ul style="list-style-type: none"> ■ Tourism Australia ■ Tourism NSW ■ The Legendary Pacific Coast Touring Route ■ Central Coast Mariners



The future of tourism in the Central Coast region relies on overcoming negative perceptions to build local pride and ownership in the region and its experiences. The Central Coast is home to an array of natural attractions including some of Australia's cleanest beaches, National Parks, one of world's top 10 surf beaches and over 625 km of waterfront which are all currently under utilised.

Within an hour of Sydney, the region is currently popular with the short break market and with increased investment could position itself as an ideal 'sea change' and 'tree change' destination for the domestic market. This investment is key for building a better destination image, improving the quality of life for residents and growing visitation.

Future Direction

- ✓ Define the Central Coast as the lifestyle and nature-based short-break destination of choice for overnight visitors from Sydney and Regional NSW;
- ✓ Leverage off its proximity, abundant waterways, history and events;
- ✓ Promote the Central Coast as a more active and outdoors destination that uses events to create a sense of vibrancy;
- ✓ Promote the lifestyle and opportunity for investment; and
- ✓ Build mid-week visitation through packages, promotion and the business market.

The recommended priority areas for the next three years are:

<h4>Activate the Waterfront</h4>	<h4>Enhance and Promote the Lifestyle and Culture of the Central Coast</h4>
<ul style="list-style-type: none"> ■ Enhance the availability, accessibility and quality of waterfront experiences on the Central Coast and use these to underpin promotions as a premier waterfront destination ■ Secure the ex-HMAS Adelaide and package Central Coast dive sites ■ Bring investment into the region from outside investors / visitors focused on waterfront enhancement and access 	<ul style="list-style-type: none"> ■ Build the 'pride' in the region (need self-esteem and belief) ■ Reverse the visitor number decline – target more mid-week visitors ■ Promote lifestyle, manage growth and day trip demand ■ Create a brand identity "more than just beaches" ■ Support Cultural/Indigenous tourism development initiatives
<h4>Attract and Grow Hero, Business and Tourism Events</h4>	<h4>Improve Partnerships and Accessibility</h4>
<ul style="list-style-type: none"> ■ Develop a Central Coast Events Strategy ■ Provide improved facilities to host events ■ Establish a hero nature-based event ■ Develop and promote a comprehensive events calendar ■ Support events to gain access to grant funding 	<ul style="list-style-type: none"> ■ Focus on business awareness and education ■ Unify the Central Coast with a common story ■ Partnerships between businesses and National Parks to present Parks and Reserves to visitors ■ Deliver the Regional Economic Development & Employment Strategy (REDES) - that's jobs (locally) and investment (tourism) ■ Better public transport systems and connections for tourists (and locals, of course) to get around easily



Short Breaks Research

The most recent short break research from the Sustainable Tourism Cooperative Research Centre (STCRC) shows:

- Coastal destinations are the number one preference for short breaks
- Value for money is the primary consideration
- Festivals and events are the number one activity
- Visiting friends and relatives is the most important motivator
- Getaway and other TV shows are the prime sources of inspiration
- Internet is the booking and planning tool of choice
- Packages are great but price is not the only driver (need a mix of attractions)
- Key features sought are range of activities, to visit friends and relatives, 4-5 star accommodation, accessibility and festivals

They want to experience something special which will turn their short break away into a lifelong memory.

Active/Outdoor Short Breaks

Recent consumer trends show a shift towards bargain hunting, higher aspirations and a stronger desire for health and well-being activities during their leisure time. For the Central Coast this means being smarter about packaging products for promotion and promoting the lifestyle opportunities.

The majority of nature based visitors are seeking active and outdoor experiences. In 2007, the most popular activities for nature-based visitors to NSW included:

- Going to the beach (incl swimming, surfing, diving) 84%
- Visiting National Parks / State parks 66%
- Visiting botanical or other public gardens 54%
- Bushwalking / rainforest walks 38%
- Snorkelling 19%
- Whale or dolphin watching 15%
- Other outdoor activities 10%



Nature Based Tourism

In Australia, the nature based traveller market has been increasing steadily in the domestic market at an average annual rate of 1% since 2003. In the year ending June 2009, there were 12.6 million domestic overnight trips that included a nature activity. This was 19% of all domestic overnight trips. The top three nature activities in the year ending June 2009 were bushwalking/rainforest walks (49%); visiting National/State Parks (46%); and visiting botanical or other public gardens (19%). Nature-based short break market from Sydney is the primary target and they will be a mix of True Travellers (in between overseas trips), Compatriots, and Pampadours. Those looking to invest in a lifestyle are going to be looking for more Pampadour and True Traveller experiences (cafes, restaurants, outdoor activities, etc) and will be less interested in tourism that generates high volumes and low values e.g. day trips.

The Central Coast is a perfect fit for the 'nature-based' traveller, as defined by Tourism New South Wales research. Their top five motivators are:

- The lure of the beach / water
- A room with a view of nature
- The great outdoors for fishing, walking and swimming
- Food with a view
- Animals in nature

Research shows that visitors don't want the same nature-based holiday wherever they go. The growth opportunity identified for the Central Coast is in growing the nature-based traveller segments with its active and outdoor travel experiences.

Indigenous Tourism

Domestic overnight Indigenous tourism visitors declined during 2008 to 456,000 visitors. This was in line with a decrease in the total domestic overnight market. Indigenous tourism visitors represented less than 1% of the total domestic overnight market .

Domestic overnight Indigenous tourism visitors spent more per trip than other visitors (\$1,570 compared to \$627). This was largely due to the longer length of stay of Indigenous tourism visitors (11 nights) compared to other visitors (4 nights). They tend to be non-working visitors (29%) and parents (27%). Domestic visitors who take part in Indigenous tourism activities are more likely to travel as a couple (38%) or as a family group (22%).

The most popular Indigenous activities for domestic visitors were: see Aboriginal art, craft or cultural display (57%), see an aboriginal site or community (26%), visit an Aboriginal art gallery (24%), and visit an aboriginal centre (29%).

The Central Coast has a rich history of Indigenous culture and has one of the highest concentrations of Indigenous sites in Australia.

The opportunity exists for the Central Coast to develop and market new Indigenous tourism products to grow their market share, through utilising the updated product manual - National Indigenous Tourism developed by Tourism Australia with assistance from the State and Territory Tourism Organisations. The Manual was designed to showcase key Aboriginal products and experiences which are able to work with the tourism industry.

Tourism NSW encourages tourism industry partners to consider the potential packaging opportunities with products in the Indigenous Tourism Product Manual (NITPM), and the opportunity to culturally enhance itineraries for customers.

Surf Tourism

Surf tourism is a growing market for Australia and NSW. In 2008, more than 1.6 million international and domestic visitors took overnight trips to coastal locations in Australia to participate in surfing activities . They contributed more than 30.7 million visitor nights to the tourism economy.

For NSW, with hundreds of outstanding surf locations, surf tourism has the potential to deliver social, economic and environmental benefits to coastal destinations in NSW. The State currently attracts around 40% of Australian domestic overnight visitors and is estimated to enjoy a similar percentage of the international visitor market to the country. The Central Coast should leverage off this growth as its current competitive advantages include:

- One of the Top 10 surf beaches in the world
- An increasing profile in the professional surf event market
- Most accessible surfing coastline, suitable for all skill levels
- A number of accredited surf schools
- Large resident surfing population
- An established urban beach culture



Enablers of Success

Key Enablers

1. Brand Development
2. Infrastructure and Investment Plan
3. Events Strategy
4. Pacific Coast Touring Route
5. Strategic Alliances

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

Brand Development

The tourism industry through Central Coast Tourism should lead the development of a unified brand story and identity for the Central Coast. This brand is essential in creating new positive messages for workforce attraction, investment and visitation.

Infrastructure and Investment Plan

The Central Coast should develop a Regional Infrastructure and Investment Plan (RTIIP) to prioritise public and tourism infrastructure projects and investment opportunities, as well as identify product development opportunities and their fit within the planning segments. The RTIIP process will provide the Central Coast with mechanisms for the implementation and monitoring of the RTIIP process.

Events Strategy

A community, tourism and business events strategy is needed to increase visitation, build community pride and attract investment and economic return. An Events Strategy will identify hero events, funding mechanisms, coordination processes and priority actions to make events a driver of growth and perception change for the region.

Pacific Coast Touring Route

Linking Cairns and Sydney, the PCTR is the primary international promotion vehicle for the Central Coast. Increasing operator participation through 'international ready' workshops will help boost the region's presence in the international market.

Strategic Alliances

Recognising that tourism is just one of the region's economic drivers, greater cooperation is needed between Councils, Central Coast Tourism, the Chambers of Commerce and Regional Development Australia on leveraging each other's economic development and promotional activities as well as working with industry partners. A combined 'Business Assets' program is seen as a logical first step and enabler of this partnership.

Strategic Priority 1: Activate the Waterfront

With over 625km of waterfront throughout the Central Coast region, water is a prominent feature of the destination and plays an important role in the lifestyle and visitor experience. In order to maximise, the Central Coast should:

- Understand the current planning restrictions on tourism opportunities through a Regional Tourism Investment and Infrastructure Plan and ensure they support and encourage future sustainable tourism development
- Improve access to the water areas through all modes of transport infrastructure including car, pedestrian, boat ramps, jetties, etc.
- Utilise the waterways through a variety of both high and low intensity experiences
- Protect waterways through a 'healthy waterways' campaign

Strategic Priority 3: Attract and Grow Hero, Business and Tourism Events

Events are a building block for growing communities and a showcase for the Central Coast lifestyle. Attracting a hero nature-based multi-sport event would provide excellent exposure for the region. To maximise this potential the Central Coast should:

- Use events as a catalyst for visitation to the Central Coast region through increased investment, development and awareness
- Attract a hero nature-based event
- Invest in venues and infrastructure
- Attract business events to increase mid-week travel
- Attract youth events (e.g. music festivals, Crusty Demons of Dirt, etc)
- Attract national and regional sporting events

Strategic Priority 2: Enhance and Promote the Lifestyle and Culture of the Central Coast

The lifestyle and community of the Central Coast region are a key part of growing the region into the future. Enhancing the liveability and building local pride are critical in removing the negative perceptions currently associated with the region. The Central Coast should:

- Develop a local and VFR marketing campaign
- Invest in community events and venues
- Grow adventure tourism product offerings in the hinterland to provide more tourism experiences and recreation opportunities for residents
- Improve service quality through training, recognition and education
- Build the indigenous cultural heritage story and products

Strategic Priority 4: Improve Partnerships and Accessibility

The Central Coast region currently suffers due to a bad reputation of poor public transport, dispersed tourism product and the 'great divide' caused by the Sydney – Newcastle Freeway. To overcome this, the region should:

- Improve accessibility and encourage movement throughout the region through tourist drives and public transport
- Encourage packaging of products and experiences
- Promote a united tourism destination with recognition for service excellence through a Business Excellence and Awards Program.

The following section explores each of these strategic objectives and presents a series of priority projects and supporting initiatives

Strategic Priority 1: Activate the Waterfront

Priority Projects

- Review of planning scheme effects on waterfront tourism and community development
- Develop a new positioning strategy for the Central Coast around waterfront

Supporting Projects

- Improve access for activities on the water (kayak, hire, jetties, etc)
- Develop a Coastal Drive as part of Pacific Coast Touring Route
- Expand tour offering to include whale watching, iconic Hawkesbury River Cruise
- Develop lookouts for whale watching and photo opportunities
- Develop a healthy Waterways program

Goals and Performance Measures

Goal

Attract investment to the region to remove negative perceptions and develop community and visitor infrastructure and experiences

Performance Measures

- Identification of precincts where waterfront tourism and community development can occur
- New investment in waterfront products and experiences

Hero Products

- Over 625 km waterfront including beach, Hawkesbury River and countless lakes and waterways
- Clean beaches
- One of the world's Top 10 surf beaches

Priority Project 1:	Review of Planning Scheme Effects on Waterfront Tourism and Community Development		
<p>Case Study: Placemaking in Chicago – The Power of 10</p> <p>Placemaking is both an overarching idea and a hands-on tool for improving a neighbourhood, city or region. It is a multi-faceted approach to the planning, design and management of public spaces.</p> <p>The Great Public Spaces in Chicago project aims to identify 10 great places in the City. The idea stems from a philosophy that it's not enough to have just one great place in a neighbourhood – you need a number of them to create a truly lively city. Each of the places are based on one of eleven underlying principles (e.g. 'you can see a lot just by observing', 'triangulate', 'develop a vision') and show that by bringing a community together who share passion and vision, anything is possible.</p>	<p>With so much waterfront land, the Central Coast region should explore opportunities to maximise use of these areas. Waterfront development should serve a variety of purposes including public spaces, accommodation, parkland, bike paths, food and beverage and retail.</p> <p>The Central Coast region must ensure local planning guidelines are supportive of tourism development and promote an equal balance between protection of the environment and facilitation of new development. Having planning guidelines that accommodate and encourage new development will be a major draw card to investors and one less hurdle to overcome.</p> <p>Development of the Central Coast region could be underpinned by a series of community and tourist hubs (refer Appendix 1). Each of these precincts will be unique in their style and target markets, but still act as a part of the greater Central Coast region.</p>		
	Action Items	Responsibility	Timing
	<ul style="list-style-type: none"> ■ Assess current planning guidelines to ensure they encourage sustainable tourism development along waterfront areas ■ Prepare a Regional Tourism Investment and Infrastructure Plan to identify investment and infrastructure opportunities at a precinct level ■ Develop an investment prospectus for new tourism and community infrastructure 	<ul style="list-style-type: none"> Central Coast Tourism Councils and Central Coast Tourism RDA Central Coast Tourism 	<ul style="list-style-type: none"> Immediate 6 - 12 months 1 – 3 years



Strategic Priority 2: Enhance and Promote the Lifestyle and Culture of the Central Coast

Priority Project

- Build local pride with marketing and VFR campaign

Supporting Projects

- Build on Indigenous story and product
- Encourage community events through investment in venues
- Attract investment in tourism through Investment Prospectus
- Disperse population and visitors by establishing adventure activities and accommodation in the hinterland
- Build service quality through the Aussie Host program; Tourism Awards program in partnership with Chambers of Commerce (refer Priority Project 4); and support links with education providers to grow education market and available courses

Goals and Performance Measures

Goal

Build a positive destination image by building local pride and increasing job opportunities and investment

Performance Measures

- Job creation in tourism and hospitality
- Visitor and resident satisfaction through regular surveys

Hero Products

- National Parks
- NAISDA Dance College
- Assortment of community events
- University of Newcastle (Ourimbah Campus)

Strategic Priority 3: Attract and Grow Hero, Business and Tourism Events

Priority Project

- Attract a 'hero' nature-based event

Supporting Projects

- Invest in event venues and infrastructure
- Attract business events to increase mid-week travel
- Attract youth events
- Attract national and regional sporting events

Goals and Performance Measures

Goal

Use events as a catalyst for visitation to the Central Coast region with increased investment, development and awareness

Performance Measures

- Visitor, local and VFR numbers at events (number)
- Average length of stay of event visitors (days)
- Website traffic during event promotion (unique visitors)

Hero Products

- Central Coast Mariners Home Games & NYE Waterfront Festival
- Music Festivals
- Food & Wine Fairs
- Film Festivals
- Mardi Gras Festival

Priority Project 2:

Build Local Pride with Marketing and VFR Campaign

Case Study:

Positively Wellington Tourism

Since it was established in 1999, Positively Wellington Tourism has faced numerous challenges including - a lack of industry engagement in building a collaborative tourism industry; need for product development in order to attract and retain visitor growth, and; negative perceptions of the city both domestically and internationally.

In combating these challenges, PWT selected a handful of areas to focus its resources on. These focus areas included:

- Implementing strong cooperative marketing campaigns locally
- Securing partner funding of major projects (e.g. Downtown and waterfront)
- Investing in skills and research to gain partner support
- Funding for a handful of successful hero events

The Central Coast region should aim to build local support for tourism and develop a unified community that is proud of their home. Local marketing promoting the experiences and 'stories' of the Central Coast region will highlight to residents the uniqueness of their region and why they should be proud to live in the Central Coast region.

The VFR market currently represents 52% of visitation to the region, up 7% on 2005. Surrounding competitor regions are experiencing VFR above these levels – South Coast (62%), Blue Mountains (61%) identifying an opportunity for the Central Coast to continue to grow this market. A VFR campaign can be used to build visitation in off peak and shoulder seasons when occupancy can be as low as 35% (May, 2009).

Action Items	Responsibility	Timing
Explore the potential of a local pass for discounted entry to events and attractions for locals and visiting friends and relatives with a local	Central Coast Tourism	Immediate
Work with local businesses to run competitions for local businesses and employees and customers to build greater local support	Chambers of Commerce	6 - 12 months
Link investment attraction and tourism promotion into lifestyle promotional activities through a dedicated lifestyle marketing plan for the region including local showcase events, publications and information evenings	Council	1 – 3 years

Priority Project 3:

Attract a 'Hero' Nature-Based Event

Case Study:

Anaconda Adventure Series Races

Major sporting events such as the Anaconda Adventure Series Races, attract thousands of participants from Australia and around the world, providing fantastic exposure for sponsors and host destinations.

Rapid Ascent runs a series of outdoor adventure race events hosted by a range of destinations throughout Australia, including the week-long Anaconda Mountain Bike Enduro race in the Red Centre (Alice Springs) and the Teva, Kathmandu and Anaconda Adventure Series Races held in several spectacular destinations across Australia and New Zealand. The Adventure Race events include mountain biking, running, kayaking and swimming which can be completed by individuals or by teams.

Events are a building block for growing communities and a showcase for the Central Coast lifestyle. Attracting a hero nature-based multi-sport event would provide excellent exposure for the region.

Successful regional events such as the Anaconda Adventure Race Series not only attract locals, old and new, but encourage friends, relatives, neighbours and visitors to experience the lifestyle and culture of the Central Coast.

If the Central Coast could secure a hero nature-based event it would provide a catalyst for visitation to the region and increased investment, development and awareness.

Action Items	Responsibility	Timing
Investigate the feasibility of a nature-based multi-sport event in the region including suggested locations and an infrastructure audit	Councils	Immediate
Prepare a proposal for a major race event coordination company such as Rapid Ascent	Councils and Chambers of Commerce	6 - 12 months
Seek the support of local sporting heroes to act as ambassadors for sporting events in the region	Central Coast Tourism	1 – 3 years

Strategic Priority 4: Improve Partnerships and Accessibility

Priority Project

- Tourism Awards Program in partnership with Chamber of Commerce

Supporting Projects

- Packaging workshops to connect local product
- Develop a hinterland tourist drive
- Business and event leverage marketing (e.g. Mariners)
- Prepare a regional Signage Plan
- Package rail with tourism experiences (opportunity to build product along rail)
- Investigate the viability of holiday public transport shuttle (Gosford – Terrigal – Ettalong – Woy Woy – Gosford) linked to rail packages

Goals and Performance Measures

Goal

Improve connectivity and destination 'togetherness' through infrastructure, promotion and packaging

Performance Measures

- Award applications (number)
- Packaged tours (number)

Hero Products

- Pacific Coast Touring Route
- Golf escape packages
- Sydney to Central Coast train trip
- Coastal villages

Priority Project 4:

Tourism Awards Program

Case Study: Grow me the Money

Funded by the Victorian State Government and run by the Victorian Employers' Chamber of Commerce and Industry (VECCI) and the Environment Protection Authority Victoria (EPA), Grow Me the Money aims to help businesses reduce their resource consumption and make savings on energy and water, and reduce waste.

The program is designed for businesses who want to begin implementing 'green' practices or who seek support and recognition for their existing practices. Grow Me the Money is a free program targeted towards small to medium sized enterprises. It is completed online and offers participants tools to measure resource consumption and waste output, a program to assist businesses develop a Sustainability Action Plan and support to help achieve goals—online tools including hints and tips, case studies, help desk and mentors.

Developed and delivered in partnership with the Chamber of Commerce, Councils, Central Coast Tourism and Regional Development Australia, a Central Coast Business Awards Program will seek to acknowledge local businesses who are leading the way with innovative business processes, product development, sustainability and overall business success. The Awards will also recognise the important social and environmental contributions made by organisations through excellence of service, commitment to their customers and environmental sustainability.

To be held annually, the awards will encourage Central Coast businesses, including tourism, to deliver innovative and exciting products and experiences to residents and visitors. Receiving a Tourism Award will be regarded as an independent and admirable endorsement of the organisation and the quality of the products and services provided. The awards raise the bar across all aspects of business in the Central Coast and provide businesses with a way to benchmark against top performers in the region. The Tourism Awards Program will reward and promote category winners as 'Central Coast's Finest'.

Action Items	Responsibility	Timing
■ Establish regional partnerships for the development and delivery of the Central Coast Business Awards Program through a Memorandum of Understanding	Central Coast Tourism	Immediate
■ Promote the program and ensure it links into State and National awards programs in business and tourism	Central Coast Tourism	6 - 12 months
■ Run a collective event and recognise the winners and participants	Central Coast Tourism	1 – 3 years



Appendix 1: New South Wales Visitor Segments

Holiday Mindset	Characteristics
<ul style="list-style-type: none"> Pampadour 	Up-market, DFY (do-it-for-you), indulgent, female skew, white collar/professional skew, overseas travel frame of reference, fashion-conscious, travel in couples, 5-star preference, avoid young children/family destinations.
<ul style="list-style-type: none"> Compatriot 	Quintessentially middle market, female skew, want DFY (do-it-for-you) but forced to compromise, family-focused, role-driven, good shoulder market, activities focused, budget conscious, like resorts and don't like camping, favour 3-star but aspire to 5-star, self-contained an advantage.
<ul style="list-style-type: none"> True Travellers 	Experimental, adventurous, trail-blazing, immersion travellers who want to experience a single destination in depth, active, overseas orientation, seeking difference and challenge, opinion-leaders, white collar and male skew, take longer holidays, will spend more getting there than being there, definitely DIY.
<ul style="list-style-type: none"> Wanderers 	Adult couples, empty nesters, frequent tourists, DIY, great off-peak market, keen observers, wide range of preferences in transport, favour difference, continue 'Darby & Joan' lifestyle when travelling, like to potter.
<ul style="list-style-type: none"> Groupies 	Younger male and student skew, DIY (excluding cooking), travel with peers in peak periods, strong repeat visitation, fairly physical, want 'bright lights' and party time, limited budgets, share accommodation / transport.



Appendix 2: Central Coast SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Waterfront - beaches, waterways and National Parks Quality and affordable accommodation Attractions and facilities Proximity to Sydney (closest beach destination 90 mins) Education and training facilities Events (current events and space for future events) 'Best of both worlds' – sea change and tree change Cultural assets Climate for an active lifestyle – walking, riding, sports 	<ul style="list-style-type: none"> Significantly less accommodation than Hunter and South Coast Not distinctive or world famous – e.g. 'world heritage' Poor rating for safety / security (NSW crime stats) Accessible by rail but not air (90% drive) Lack of awareness or poor perceptions of 'Central Coast' International growth but 41% VFR Community infrastructure and activities Lack of critical mass – mostly small operators Seasonality (Peak in January, Fall in June)
Opportunities	Threats
<ul style="list-style-type: none"> Live, work, invest....+ 'visit' Managing growth to your natural advantage Promotion (lifestyle, education, niche) New experiences in nature-based tourism (inc. hinterland) Education and business tourism Region-wide approach to marketing and business attraction Positive parochialism - do business locally Events – sports, youth and music (in nature) Compatriots (60% stay with friends/camp), Pampadours and True Travellers Emerging 'adventure' brand and cultural tourism market Waterfront accommodation development Packaging and trail development 	<ul style="list-style-type: none"> Lack of a clear identity – stuck in the middle Infrastructure – meeting the growth Population growth below 1% Losing Sydney visitors to Blue Mountains, South Coast and Hunter Decline in visitors and average length of stay Car dependent travellers (limited internal transport) Environmental degradation Planning constraints Water – visitors use 242,136,000 litres per annum

Appendix 3: Competitor Analysis

Research into destination competitiveness by the STCRC examined 36 destination competitiveness attributes and highlighted 10 core determinants of destination competitiveness. These 10 core determinants have been explored for the local and domestic competition of the Central Coast below:

Top 10 Attributes	Local Competition	Domestic Competition
Physiography and Climate	HIGH	MOD
Market Ties	MOD	LOW
Culture and History	MOD	LOW
Tourism Superstructure	MOD	MOD
Safety and Security	LOW	MOD
Cost / Value	HIGH	MOD
Accessibility	HIGH	HIGH
Awareness / Image	LOW	LOW
Location	HIGH	MOD
Infrastructure	MOD	MOD
Safety and Security	LOW	MOD



Appendix 4: Central Coast Precincts



Appendix 5: The Consultation Process

EC3 Global, an international tourism and environmental management organisation, was appointed by Central Coast Tourism to facilitate the development of a Destination Management Plan for the Central Coast through a comprehensive consultation process. The key steps undertaken are outlined below:

Stage	Milestones	Timing
1	Getting Started – Introduction at the CCT Members Forum	Feb 22nd
2	Review of research and plans	Feb / Mar
4	Stakeholder interviews	Feb / Mar
3	Workshop with the board and key stakeholders	Mar 18
4	Stakeholder interviews	Feb / Mar
5	Strategic Vision Workshops with stakeholders	Apr 12th
6	Draft DMP for input	May

The following stakeholders participated in workshops held on 19th March 2010 (Ourimbah University) and 12th April 2010 (Mantra Kooindah Waters and Crowne Plaza Terrigal).

- Brent Pilkington Accom Terrigal
- Bridget Sheary Accom Terrigal
- Gerad Barnard Australia Walkabout Wildlife Park
- Tassin Barnard Australia Walkabout Wildlife Park
- Mary Rayner Australian Reptile Park
- Karen Naylor Australian Tourist Park Management
(Ettalong Beach Holiday Village)
- Mick Kilp Avoca Beach Chamber of Commerce
- Warwick O'Rourke Cedar Park Lavender Farm
- Wayne Gates Central Coast Business Enterprise Centre
- Jane Smith Central Coast Marine Discovery Centre
- Beverley Sears Central Coast Mariners
- Paul Minto Central Coast Reef & Game Fishing Charters
- Shane Alvisio Central Coast Sports Federation
- Samantha Bunn Central Coast Tourism
- Tony Collits Central Coast Tourism
- Tim Costello Central Coast Tourism
- Christine Duchenne Central Coast Tourism
- Leeanne Dyer Central Coast Tourism
- Jacqui Greaves Central Coast Tourism
- Joy Groves Central Coast Tourism
- Sarah Kerrsmith Central Coast Tourism
- Ollie Philpot Central Coast Tourism
- Alison Steele Central Coast Tourism
- Ginnie Thompson Central Coast Tourism
- Zoe Long Chill, Cook, Create
- Chris Hooper Country Comfort Terrigal
- Cameron Speedie Crowne Plaza Terrigal
- Esther Beaton Esther Beaton Wild Pictures
- Michelle Palfrey Faculty of Tourism & Hospitality,
TAFE Central Coast Campus
- Margaret Paterson Festival Development Corporation
- Peter Buteux Firescreek Wines
- Ellie Walker Firescreek Wines
- Les Rogan First National Real Estate
- Barton Lawler Glenworth Valley
- Gordon Millar GM Imaging P/L
- Ali Vidler Gosford Business Improvement District
- Deborah Lowndes Gosford Business Improvement District
- John Tilston Gosford Challenge - Gosford City Council
- Cllr Laurie Maher Gosford City Council
- Kim Radford Gosford City Council
- Cllr Jeff Strickson Gosford City Council
- Jan Wells Gosford City Council
- Chris Holstein Mayor - Gosford City Council
- Shari Young Greater Toukley Vision
- Tony Sansom Industry & Investment NSW
- Pam Duncan Ken Duncan Galleries
- Nicole Edwards Kims Beach Hideaway
- Paul Brasch Mantra Ettalong Beach
- Sandra Kerr Mantra Kooindah Waters
- David Harris MP Member for Wyong
- Paul Barnett Mingara Recreation Club
- Angela Lanser Mingara Recreation Club
- Phil Walker Mingara Recreation Club
- Jacqui O'Callaghan NSW Business Chamber
- Ken Baker NSW Business Chamber
- Debbie Colbourne NSW National Parks & Wildlife
- Susan Davis NSW National Parks & Wildlife
- Jenni Farrell NSW National Parks & Wildlife
- Vanessa Fordyce Ocean Beach Holiday Park
- Tanja Hooker Ocean Beach Holiday Park
- Robyn Marsden OzVideoTech
- Matthew Wales Peninsula Chamber of Commerce
- Bob Diaz Pro Dive Central Coast
- Sarah Gray Quay West Resort Magenta Shores
- Anthony Dow Regional Development Australia
- Mardi Love Sport & Recreation Communities NSW
- Joan Bracken Terrigal Hinterland B&B
- Nevil Bracken Terrigal Hinterland B&B
- Ray Fraser The Cowrie Restaurant
- Rebecca Jones The Entrance Town Centre Management
- Rosemary Moore Tiarri Terrigal
- Ian Cameron Tourism NSW
- Peter Evans Treetops Resort Avoca Beach
- Sharon Martin Umina District Chamber of Commerce
- Michael McGee Virtual Property Developments
- Alison Heathcote Waste Warriors Worldwide
- Priscilla Page Westfield Tuggerah
- Laurie Leask Wombats B&B
- Tracy Southern Wyong Shire Council
- Cllr Lynne Webster Wyong Shire Council
- Bob Graham Mayor Wyong Shire Council
- Tara Mills Wyong Shire Council

