

Central Coast Destination Management Plan For the Visitor Economy 2013 to 2017



Prepared December 2013



Introduction

The NSW Government recognised the importance of managing the growing Visitor Economy through Destination Management Planning in the Visitor Economy Industry Action Plan for NSW (2012).

In setting the ambitious target of doubling of visitor expenditure by 2020 the Government called on each region to prepare a Destination Management Plan (DMP). Destination Management Planning provides a tourism organisation with the tools to produce a sustainable and competitive visitor economy in a destination. Each region's DMP needs to demonstrate their contribution to achieving the 2020 target through management, development and promotion of its unique assets.



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Executive Summary

A. Destination Analysis

The Central Coast is located in a unique position midway between two major Australian cities. Just one hours drive north of Sydney, the region is a world of beautiful coastlines, golden beaches, alluring lakes and pristine National Parks.

The region covers an area of 1,854 square kilometres of which 80% remains 'natural' and undeveloped, and is 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 lifestyle. The region is home to approximately 325,295 people and is expected to grow at one of the fastest rates in New South Wales to increase to over 385,560 residents by 2031, which means new jobs are needed.

In 2010, the Central Coast was the first region within NSW to complete a Destination Management Plan and this has been guiding the region's progress over the past three years. This has been further supported by the preparation of the Central Coast Tourism Opportunity Plan in 2013 which identified and aligned viable catalyst tourism projects.

The region has made significant progress towards achieving the goals of the Central Coast Destination Management Plan for Tourism 2010-2013.

This includes:

- Increasing overall visitor nights by 0.4% and growth in commercial accommodation of 5% with above average growth between April and September
- Increased visitor expenditure from \$750 million to \$800 million supporting 657 new jobs.
- Increase in number and share from Sydney short-break market against other regions in the short-drive radius
- Increased use of 'Central Coast' as an online search phrase

* Population figures taken from profile.id and forecast.id for Gosford City and Wyong Shire, based on Estimated Resident Population YE June 30 2012 and Population Forecasts prepared July 2012.

B. Destination Direction

A visitor economy vision for a destination needs to be clear, concise and leverage the unique selling points of the region. Taking the above considerations into account, the visitor economy vision for Central Coast is:

Vision

Build on the Central Coast's competitive strength of its location by the water and become a leader in natural adventure and event experiences that act as a catalyst to year round visitation.

Mission

Enhance the Central Coast's natural advantage and offer visitors an antidote to city life to drive a sustainable visitor economy, enrich community assets and create local employment.

Goals and Objectives

- **Increase the average length of stay by 5%** across all markets from 2.8 nights to 3 nights
- **Increase the average spend per visitor by 10%** growing domestic overnight from \$143 to \$157; international overnight from \$41 to \$45; and domestic day from \$70 to \$77
- Increase our **share of the NSW conference and events market by 3%**
- **Increase the range of visitors that disperse their spend throughout the year** (More 'active' True Travellers and Peer Group visitors and those travelling for a purpose)

Strategic Priorities

There are four strategic priorities each with a number of actions, they are:

1. Build a sustainable visitor economy to support future investment
2. Connect people and places
3. Target more active travellers
4. Activate the destination and natural assets

Priority Projects

There are five priority projects which support these priorities, they are:

Priority Project One:

Tourism Opportunity Plan Catalyst Projects

Priority Project Two:

Central Coast Regional Events Alliance

Priority Project Three:

Create and Promote Iconic Trails

Priority Project Four:

Integrated Social Media Strategy

Priority Project Five:

Online Booking System Review

Priority Project Six:

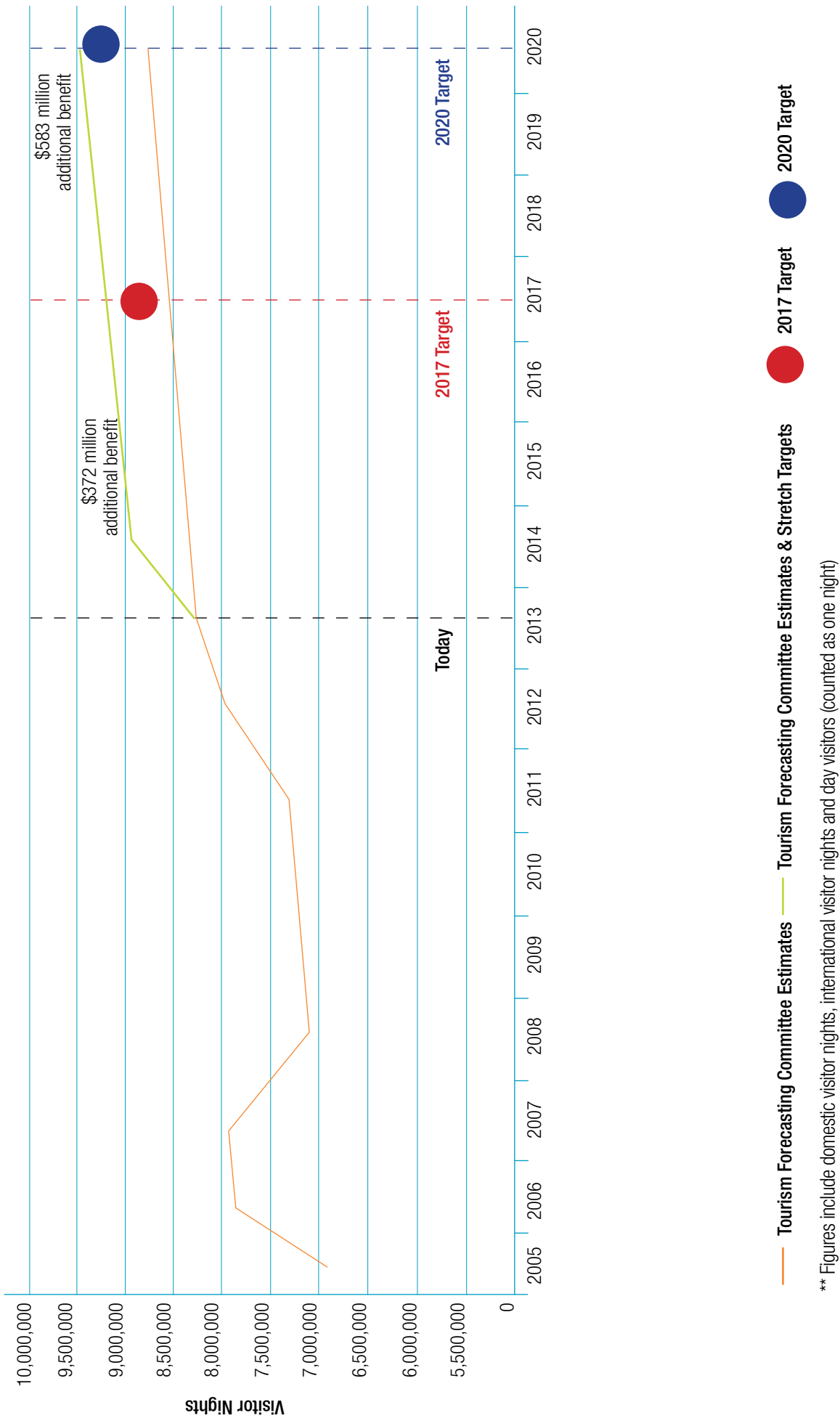
Actively Encourage product development and enhancement

Overview of Goals and Additional Benefit to 2017 and 2020

Goals	2017 Additional Benefit	2020 Additional Benefit
Increase average length of stay by 5% pa	\$132 million	\$205 million
Increase average spend per night by 10% by 2020*	\$182 million	\$265 million
Increase share of NSW events markets by 3% by 2020	\$30 million	\$37 million
Grow true traveller and peer group market share by 1% by 2020	\$28 million	\$ 76 million
TOTAL ADDITIONAL VALUE	\$372 million	\$ 583 million

* Including annual inflation of 2.3%

Figure 13: Forecast Visitor Nights to 2020 showing TFC Estimates and TFC with Stretch Targets



1.1 Embracing the Visitor Economy

In 2011 the NSW State Government established the Visitor Economy Taskforce to develop a strategy to double overnight visitor expenditure to NSW by 2020. This would mean the Central Coast would need to double its current expenditure of \$800 million to \$1.6 billion by 2020. In commissioning the Taskforce, the State Government was motivated by a series of concerns relating to the perceived strategic stagnation of tourism in the State and the multiple impacts of that stagnation – in conjunction with a range of factors including the high Australian dollar – on the viability of the industry and its long term contribution to the State and regional economies.

In its final report to the State Government, the Taskforce enunciated a powerful agenda for change predicated on a series of “musts” including:

- Increase visitation
- Grow physical capacity
- Renew and revitalise destination
- Improve the visitor experience
- Increase visitor spend
- Make Sydney and NSW more competitive
- Change the mindset of Government and Industry

The State Government in large measure embraced the findings of the report and set in place an action plan to drive a new paradigm that moves beyond tourism to a new and wider focus on the “visitor economy”. This includes recognising the need for regions to adopt an integrated approach to tourism; establishing a clearer linkage between social, environmental and economic development and tourism which looks beyond leisure.

What is the Visitor Economy?

According to the Visitor Economy Taskforce, the term “visitor economy” takes into account **“broader economic activity than what has been historically defined as tourism and events”**. It encompasses the direct and indirect contributions to the economy resulting from a person (a ‘visitor’) travelling outside their usual environment for holiday, leisure, events and festivals, business, conventions and exhibitions, education, to visit friends and relatives and for employment in NSW.

This new focus forces a broad strategic focus beyond marketing to every facet of experience creation and capacity building that contributes to the creation and sustaining of a viable and growth oriented visitor experience. Transport infrastructure, place management, cultural development, information technology, broadband, sports, human resource availability and skills are all brought into the mix and create challenges and opportunities that need to be addressed by a coalition of stakeholders.

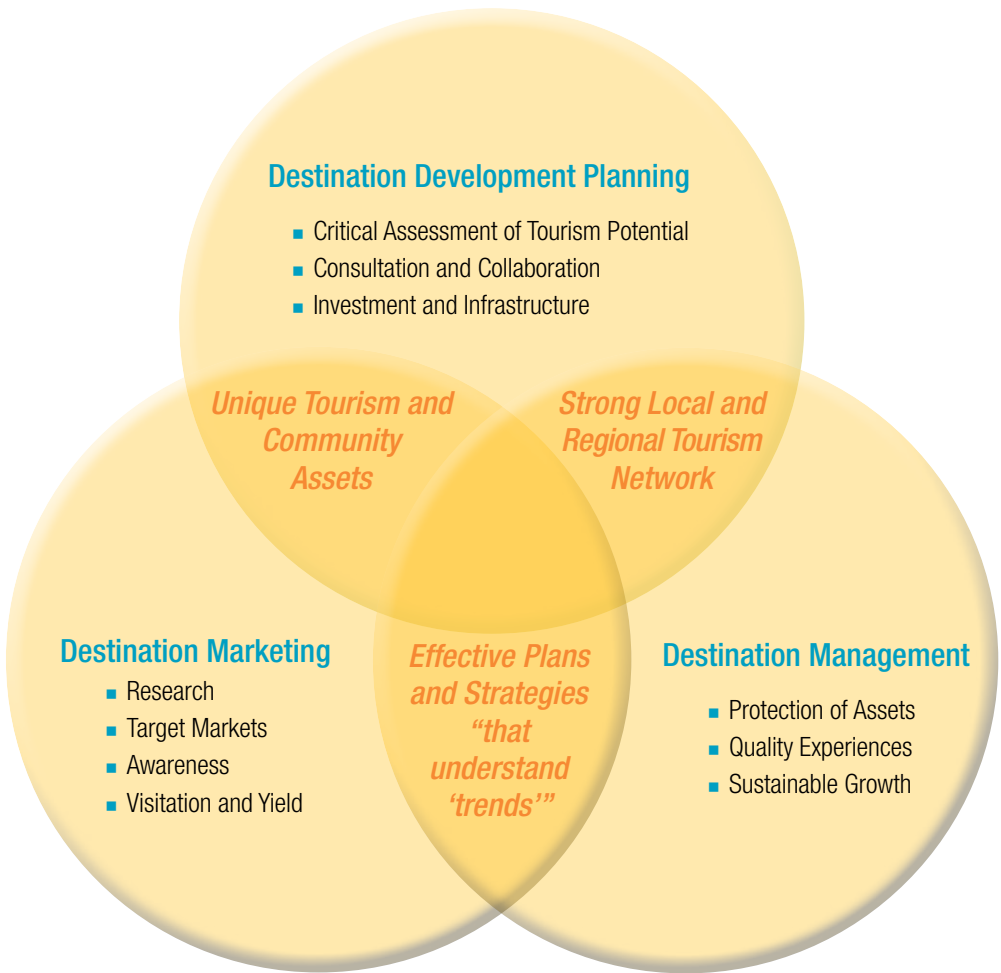
A key element in this new approach is the need for each region to complete a Destination Management Plan (DMP). The Central Coast was the first region to complete a DMP (2010-2013) and this is the second DMP for the region. The development of the Destination Management Plan aims to provide Central Coast Tourism with a region-wide strategic planning framework for tourism development and marketing the region.

1.2 What is a Destination Management Plan?

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, 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.

“ The difference is made in open and honest communication, matching people in the tourism network to the trends and opportunities and by prioritising our efforts. ”



Destination Management Plans (DMPs) are developed after a comprehensive process of research within the destination, including 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 Destination NSW’s annual business plans and provide a strategic platform to guide the strategies and business plans of industry stakeholders.

Key Characteristics of a Destination Management Plan

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 activities;
- 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; and
- Encourage political will for an ongoing, progressive and innovative approach.

1.3 Economic Benefit to the Central Coast Economy

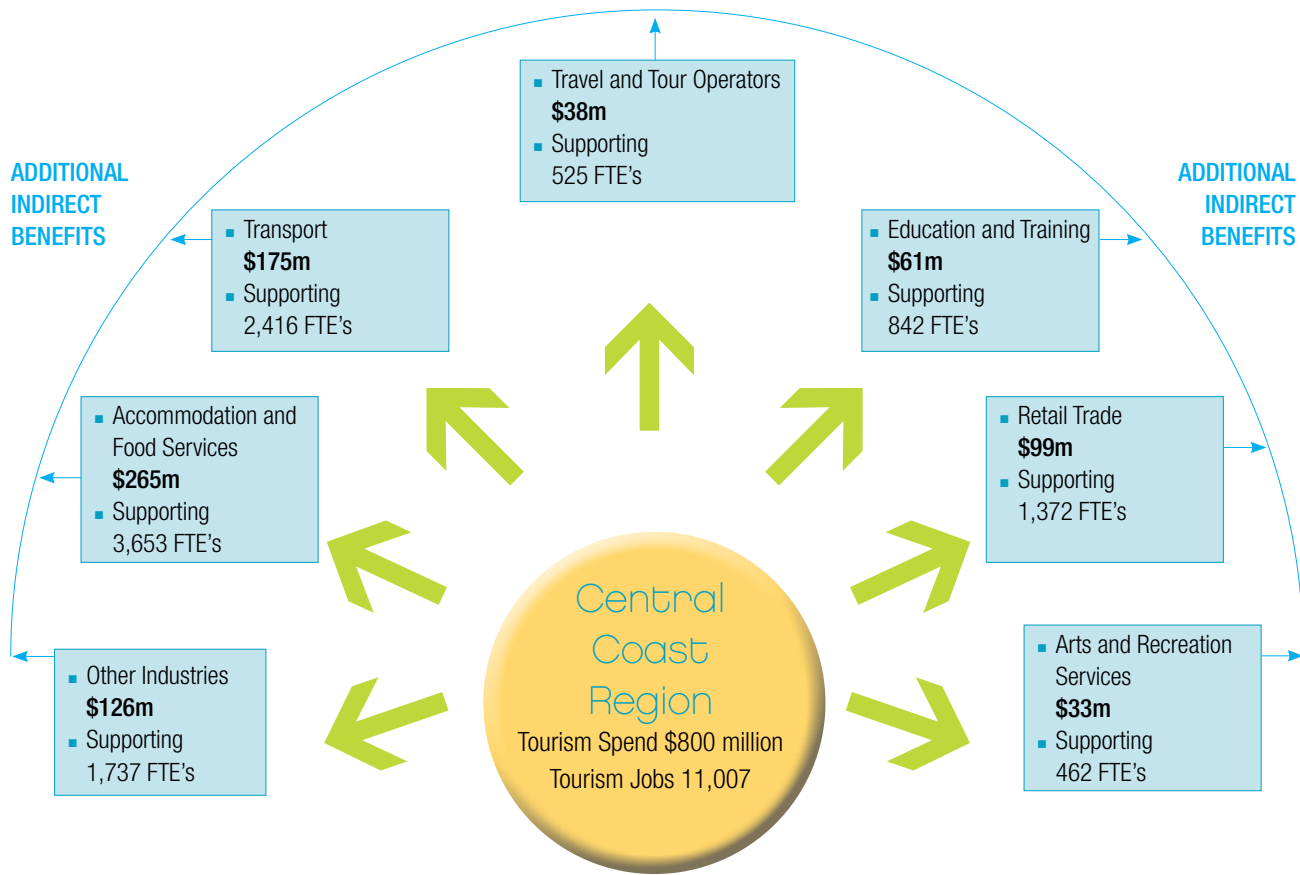
Tourism expenditure impacts a number of sectors in the economy. Visitors inject approximately \$800 million of direct expenditure into the Central Coast economy which contributes to over \$1.4 billion of indirect expenditure across sectors including retail, transport and education.

In the Central Coast region, tourism directly supports approximately 11,007 jobs. For every \$72,000 of tourism spend in the Central Coast region one Full-Time Equivalent (FTE) job is created.

This is an increase from 10,350 employees in 2010 using the revised methodology from the National Tourism Satellite Accounts prepared by Access Economics. This shows that an increase in visitor spend has a direct positive impact on local and regional employment figures.

Figure 1 below shows the direct impact of tourism on the region's economy starting with direct expenditure and jobs and where that money is spent based on estimates from EC3 Global using the National Tourism Satellite Accounts prepared by Access Economics.

Figure 1: Tourism Benefit to Central Coast Economy



NOTE: These measurements of tourism value across sectors have been extrapolated based on the professional estimates of EC3 Global, using the national data outline in the Tourism Satellite Accounts (prepared by Access Economics). The 2010 figure of 10,350 jobs was developed using a revised estimate of the visitor spend required to create each job. Therefore these figures cannot be compared with the 2010 DMP figures which were calculated on a higher spend per job figure.

1.4 Central Coast Achievements - Destination Management Plan 2010-13

The Central Coast has made significant progress towards achieving the goals of the Central Coast Destination Management Plan for Tourism 2010 - 2013.

It also has to be acknowledged that significant work has been done in establishing new networks and partnerships not only within the region but also external to the region. Leveraging these networks will be critical to achieving the next set of goals outlined later in this document.

1.4 Central Coast Achievements - Destination Management Plan 2010-13 (cont.)

Goal	Measure	What has been achieved
<ul style="list-style-type: none">■ Increase in the off-peak season visitation	<ul style="list-style-type: none">■ Increased visitor nights throughout the year	<ul style="list-style-type: none">■ Overall visitor nights have increased by 0.4%. Those in commercial accommodation have grown by 5% with above average growth between April and September
<ul style="list-style-type: none">■ Attract more outdoor, active and affluent nature based travellers for short breaks	<ul style="list-style-type: none">■ Increased visitor expenditure	<ul style="list-style-type: none">■ Visitor expenditure increased from \$750M to \$800M■ This has been driven by growth in more active traveller segments e.g. True Travellers■ Established new community recreation infrastructure that also benefits the visitor i.e. cycleways/coastal walk/multiuse pathways
<ul style="list-style-type: none">■ Deliver a quality visitor experience that is differentiated and competitive against Mid North Coast, Hunter Valley, Blue Mountains and the South Coast	<ul style="list-style-type: none">■ Grow our share of Sydney short breaks	<ul style="list-style-type: none">■ Increase in number and share from Sydney short breaks against other regions in short-drive radius■ Future tourism has been incorporated in both LGA's draft Local Environment Plans■ Ex-HMAS Adelaide experience established
<ul style="list-style-type: none">■ Create a positive destination image through a unified regional brand and campaign	<ul style="list-style-type: none">■ Increased brand awareness and brand health	<ul style="list-style-type: none">■ Increased use of 'Central Coast' as a search phrase (Google Trends)■ Brand Guidelines integrated into all collateral■ 52 Local Secrets Campaign - member investment, local media engagement■ www.getoutofsydney.com.au campaign - member investment■ Sydney Surrounds Cooperative (Hunter, Port Stephens, Blue Mountains)■ The Code Mariners TV Documentary series■ Actively engaged social media■ New websites launched www.visitcentralcoast.com.au and www.ourcentralcoast.tv■ New tag line developed – 'fun starts here'
<ul style="list-style-type: none">■ Promote the Central Coast as a place to live, work, invest and visit	<ul style="list-style-type: none">■ Population growth and employment	<ul style="list-style-type: none">■ Population and employment growth - up by 657 jobs from 2010 to 2013 (EC3 Global estimates from Tourism Satellite Accounts)■ Greater stakeholder engagement The success of the Central Coast Mariners is building local pride and creating significant regional exposure■ Recognised as an official region by Destination NSW (and statistically)■ Regional collaboration to secure inclusion (Stage 1) of the National Broadband Network (NBN) roll out■ New website launched www.investcentralcoast.com.au■ Development of Tourism Opportunity Plan and five investment catalyst priorities■ Secured \$250K in tourism product development funds through Destination NSW Regional Tourism Partnership Program■ Secured over \$538K in tourism product development funds through the Federal TQUAL and TIRF Grants programs■ The Entrance Tourism Economic and Enhancement Project



1.5 Tourism Opportunity Plan Outcomes

The Tourism Opportunity Plan released in April 2013 identified over 44 regional projects (see page 44/45, Appendix 6) through broad regional consultation and engagement. The key stakeholders involved identified five catalyst projects.

The five catalyst projects for the Central Coast Region are:

Mount Penang Tourism Precinct

Mount Penang has the potential to be a catalyst project through the creation of a number of tourism development components which could include an interactive visitor attraction experience, event space, an outdoor movie theatre, commercial accommodation and an agritourism experience (microbrewery, cider house, chocolate factory etc.). The Mt Penang Tourism Precinct could increase the Central Coast share of the NSW visitors by 1%. With this increase, the region would receive an additional 42,000 visitors per year by 2020, resulting in \$20 million more in visitor expenditure by the same year. This prediction, however, is based on the completion of the cultural tourism precinct development by 2017.

The Waterfront Development at Gosford

The Waterfront Development is particularly significant as Stage 1 is expected to include a Regional Performing Arts and Conference Centre integrated hotel which is anticipated to be a major draw card for performing arts related events and as a resource particularly for the local community.

Motorsport Precinct

The Central Coast is in an ideal position to facilitate a motorsport precinct to help service the Greater Sydney region in particular. There are very few motorsport precinct facilities in NSW (2 facilities) compared to Victoria (5 facilities). Furthermore, the closure of facilities such as Oran Park in Sydney has significantly limited the supply of motorsport facilities, yet it is noted that demand for learner training, driver training generally, car club days, corporate events, festivals and other forms of events is high. The developed market forecast assumes that a motorsport precinct would bring approximately 45,000 to 60,000 new visitors to the Central Coast with an estimated visitor spend of an additional \$26 million by 2020.

Pioneer Dairy Sporting Hub

The opportunity exists to develop a major sports precinct on the Pioneer Dairy site at Tuggerah. This could offer sporting related facilities which would enable the region to host a variety of regional, state wide and national sporting events and which could potentially be the home for many regional sporting bodies. By hosting three small events (350-550 pax) and bigger events attracting about 2,000 pax each month, the share of NSW sporting visitors could increase by 1% leading to an additional 40,000 visitors each year and an addition of \$30 million in visitor expenditure by 2020.



Tourism Hub at The Entrance

A variety of development projects are currently planned at The Entrance and North Entrance which have the potential to significantly increase visitation to the Central Coast as identified in The Entrance Town Centre Masterplan. Such projects currently include the development of a 800-1,000 seat conference centre with a 400+ room integrated hotel.

All of the 44 projects and investment opportunities outlined in the TOP have been classified as one of the following project categories:

- **Accommodation**
 - Expanding the size of the accommodation sector and/or the type of accommodation on offer within the region;
- **Attractions, Activities and Sports**
 - Providing new and/or updating existing attractions within the region;
- **Community**
 - Aiming to improve the understanding of tourism and its importance to the local economy within the community. This also covers projects that provide essential community services and infrastructure to improve the ability of the region to service the needs of current and future visitors;
- **Human Resources**
 - Aiming to up-skill tourism sector players to provide visitors with high quality services and to offer more employment opportunities.

A detailed overview of these projects and investment opportunities can be found in Appendix 6 (pages 44/45).

2.1 Key Destination Footprint

The Central Coast is located in a unique position midway between two major Australian cities. It is an hour north from the heart of Australia's largest city, Sydney with a population of more than 4.6 million people, while less than an hour south of one of Australia's most vibrant cities, Newcastle, with a population of approximately 546,000.

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

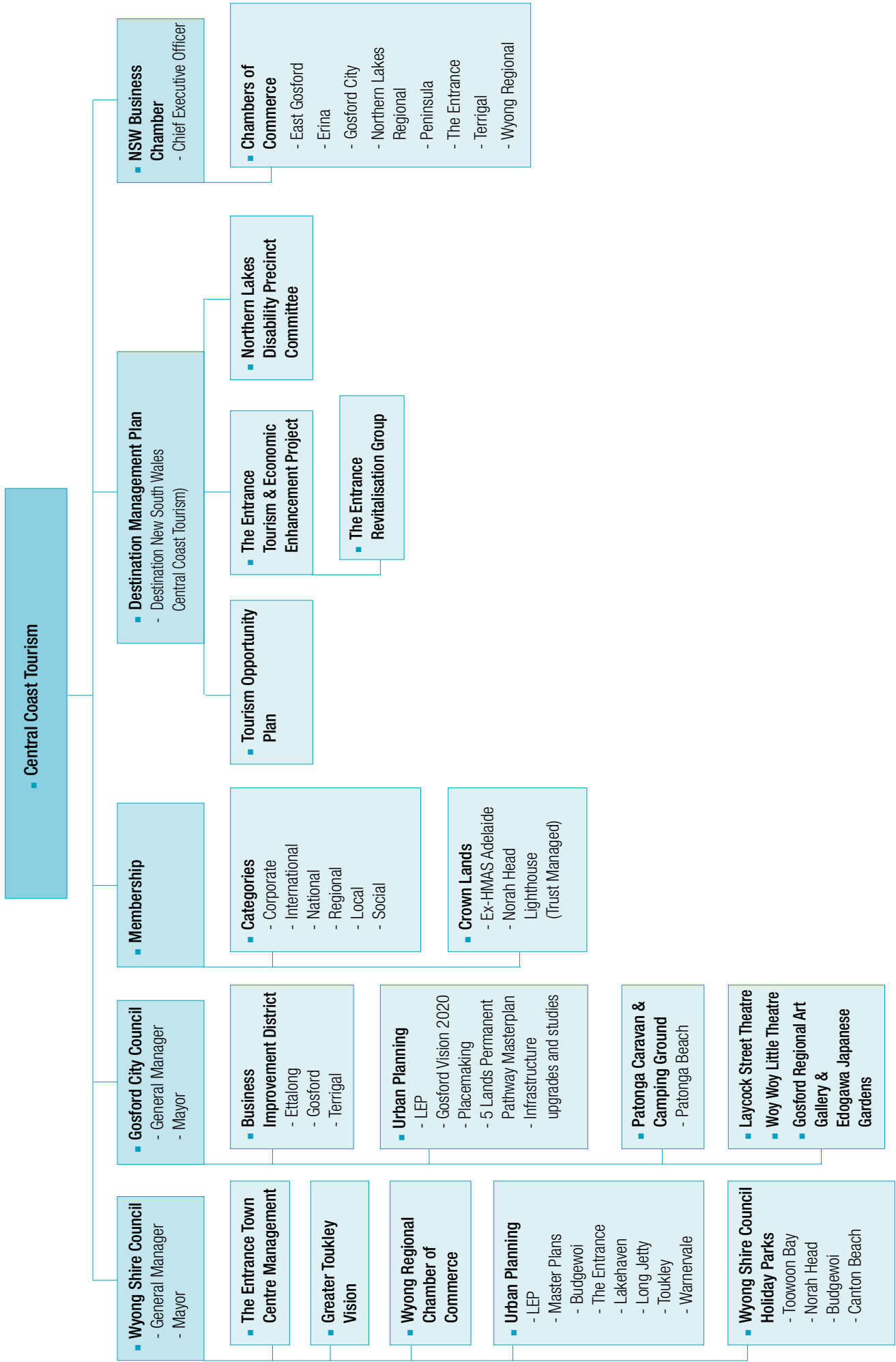
The Central Coast is well known for its outstanding environmental qualities and lifestyle. The region is home to approximately 325,295 people and is expected to grow at one of the fastest rates in New South Wales to increase to over 385,560 residents by 2031 which means new jobs are needed. Contrary to this projection, the region has recently experienced a decline in growth, slowing to slightly over 0.7% per year in 2011 (approx. 2,400 people).

To foster tourism growth a Tourism Opportunity Plan (TOP) was developed and released in early 2013. With a purpose to identify and align viable catalyst projects and to determine their way forward, the report highlights 44 investment and infrastructure opportunities, highlighting five as catalyst projects.

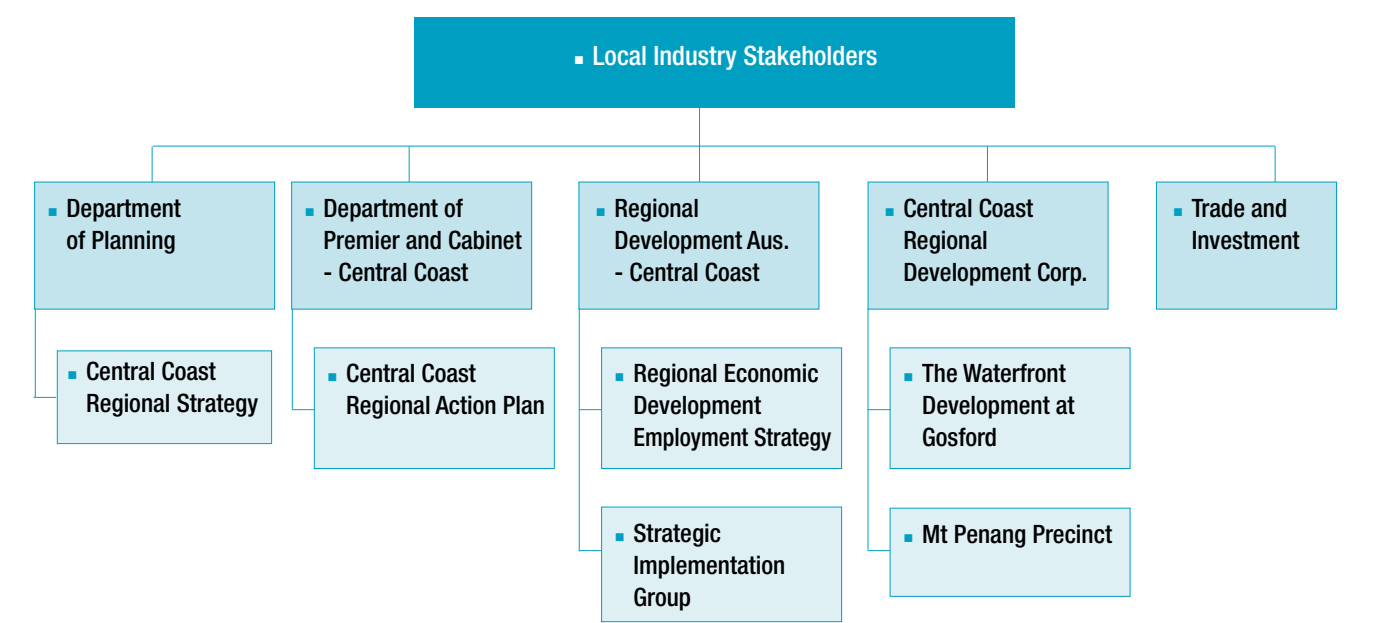
The catalyst projects play an important role in stimulating other investment and ultimately generating sustainable tourism growth in the region.



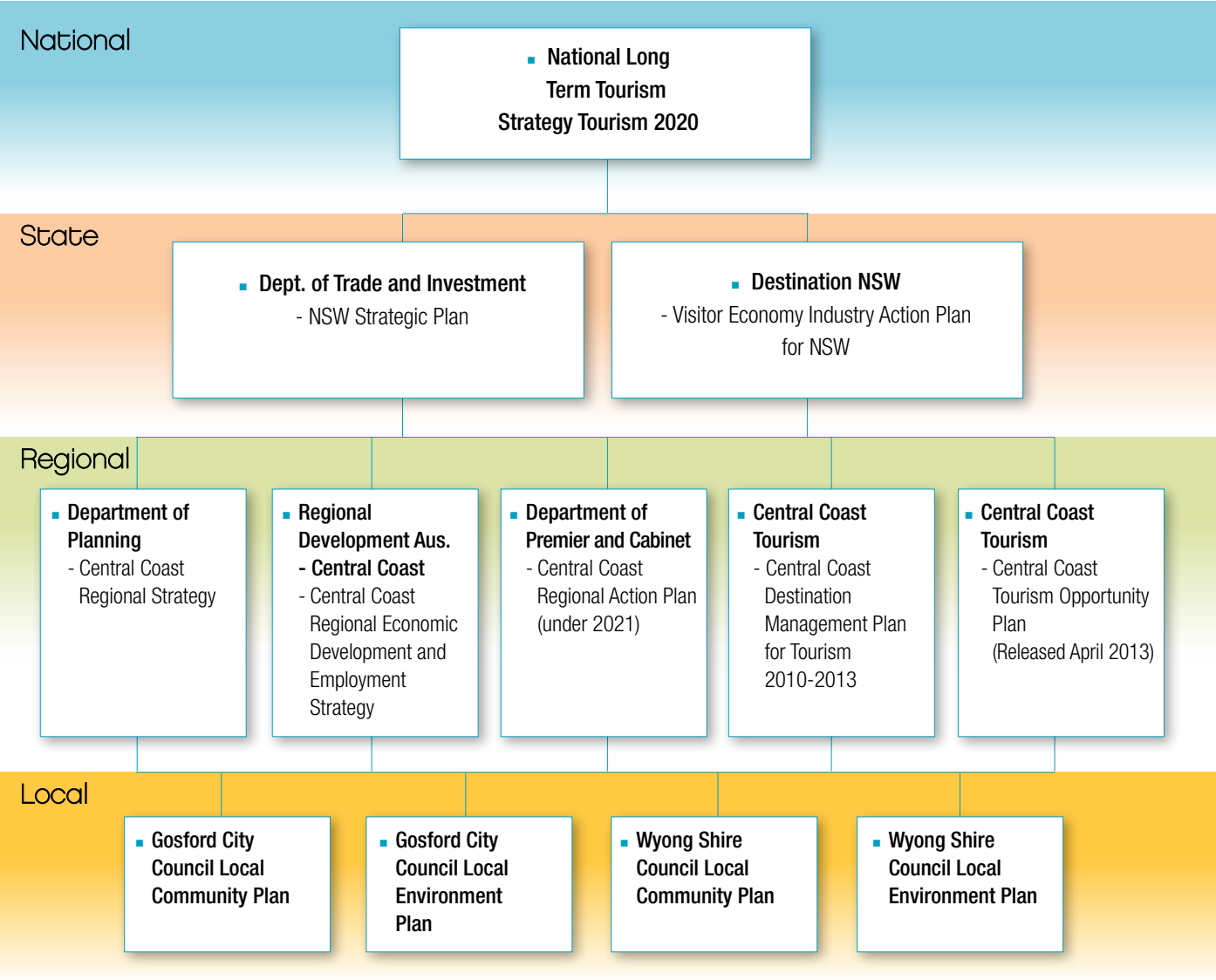
2.2 Key Stakeholders



2.2 Key Stakeholder Strategies



2.3 Key Data and Documents



2.4 Key Assets

Taking into account an audit of current experience, product, attraction and service offering and feedback from consultation with key stakeholders, the following assets have been identified as the region's best.

Key Asset	Description	Consumer Appeal
Waterways and Wetlands	<p>The Central Coast features more waterfront than Sydney Harbour alone and is home to some of the best surf beaches in Australia (and arguably the world).</p> <p>Current efforts towards establishing a significant wetlands area near Pioneer Dairy attracts greater focus to the waterways.</p>	<ul style="list-style-type: none">■ Supreme coastal getaway with spectacular waters and pristine beaches; a water lovers' paradise.■ Potential 'voluntourism' experience to engage visitors in conservation & rehabilitation programs.
Wilderness	<p>Villages of the region are nestled in a wilderness setting with over 80% of the countryside still in its original natural state.</p>	<ul style="list-style-type: none">■ Region remains for many visitors unexplored and offers an array of outdoor and adventure experiences.
Community Driven Lifestyle and Events	<p>Region boasts a unique and well-rounded lifestyle encompassing sports, music, surf culture, adventure and cars. It is home to a variety of locally driven events that have grown to attract visitors from interstate and internationally.</p> <p>Local community is very active in nature, the arts and music and perform and exhibit a work-life balance that people desire and need – offering the antidote to city life.</p>	<ul style="list-style-type: none">■ Opportunity to immerse oneself in a community bursting with culture and partake in a well-balanced and enjoyable lifestyle.
Location, Proximity and Space	<p>Located between two major cities each with growing air access and increasing population. Ideal as a short-break, coastal or hinterland destination for time-poor travellers.</p> <p>Easily accessible and the start of the Legendary Pacific Coast Touring Route, the most trafficked route in Australia and key to domestic and international marketing campaigns.</p>	<ul style="list-style-type: none">■ Close proximity to Sydney and region's natural scenic attributes marks the Central Coast as an attractive destination for short-breaks and natural escapes not far from one's doorstep.
Historical and Cultural	<p>Region's natural setting is intertwined with Indigenous and European history.</p> <p>Significant cultural assets include the 5 Lands Walk, the UNESCO World Heritage Listed Old Great North Road and the Norah Head Lighthouse.</p>	<ul style="list-style-type: none">■ Visitors have the option to explore sights steeped in historical and cultural significance and learn about heritage aspects of the region.
Natural Journeys	<p>Numerous coastal walks, outdoor and natural journey experiences available, including the 5 Lands Walk, dive the Ex-HMAS Adelaide Artificial Reef, waterway tours and hinterland adventures e.g. Treetop Adventure Park and Glenworth Valley.</p>	<ul style="list-style-type: none">■ Ability to enjoy plentiful natural settings with exceptional scenic value.■ Visitors can rejuvenate in a natural setting away from the hustle and bustle.■ Visitors can experience soft adventure activities in the natural environment.

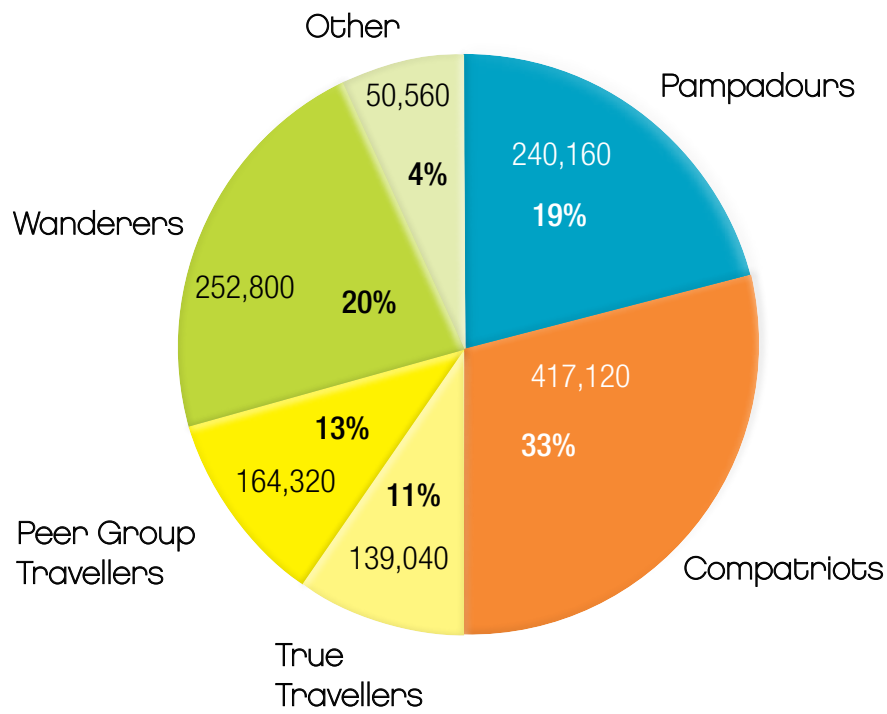
2.5 Primary Target Markets

Destination NSW uses a series of Traveller Types in its marketing strategies. In 2000, See Australia conducted a study into ‘holiday mindsets’ (i.e. Traveller Types) based on a ‘state of mind’ rather than specific demographics alone.

From this research, five holiday mindsets were derived:

- Pampadours:** The indulgence segment. Pampadours want it all. They seek out new places, new faces, a different culture, climate and food and activities not available or taken up at home. They travel outside school holidays. They avoid caravans; self contained accommodation; day trips and adventure or risk.
- Compatriots:** Middle Australia. Compatriots travel with their family. They have to budget and look for value and accessibility. The children of Compatriots often have a role in deciding a holiday destination. Holidays are usually taken in single blocks, to allow maximum recharge.
- Wanderers:** Independent potterers. Nearly 1/2 of the Wanderers segment is retired. Wanderers take many holidays. They seek out value for money and take their holidays outside school holidays.
- True Travellers:** They are travellers, not tourists. They often holiday overseas where they immerse themselves in a different culture. They favour spontaneity. They respond to physical activity, personal fitness travel, adventure, risk and things they would not do at home.
- Peer Group Travellers:** A segment with a skew toward youth, males and school and tertiary students. They travel in peer groups and in peak periods. They want party time; bright lights; clubs and pubs: fishing or hunting trips by males; girls' weekends, school reunions etc.

Figure 2: Central Coast Breakdown of Domestic Overnight Traveller Types



Source: Destination NSW, Year ending December 2012



2.6 Unique Selling Points

The Central Coast region has a wide range of both active and passive experiences all of which contribute to the region's unique selling proposition. These experiences are what make a visit to the Central Coast special and play a major role in deciphering the region's competitive advantage and identifying emerging markets.

Nature-based

- Beaches
- Wetlands
- Waterways
- Hinterland
- State Forests, National Parks and walking trails
- Coastal walks
- Wildlife attractions
- Dolphin and platypus viewing
- Whale watching
- Native and ornamental gardens

Events and Festivals

- 5 Lands Walk
- ChromeFest
- Summer City Rumble
- Horse Racing
- Winter Blues and Jazz Festival
- Brisbane Water Oyster Festival
- Central Coast Country Music Festival
- Central Coast Christmas Fair
- Whale Dreamers Festival
- New Year's Eve Festivals: Gosford and The Entrance
- Central Coast Rugby Sevens
- Central Coast Mariners events

Lifestyle, Culture and Heritage

- UNESCO World Heritage Listed Old Great North Road
- Seafood on the water
- Farmers and beachside markets
- Accessible beach initiative
- Aboriginal dance college
- Art trails
- Historical sites
- Galleries, theatres and live entertainment
- Golf and spas
- Brewery, winery and distillery experiences

Adventure

- Surfing
- Participation sports
- Flying fox experiences
- Mountain biking
- Horse and quad bike riding,
- Abseiling
- Dive attractions
- Adventure Course Events including: The Stampede; Beach Bash; RAW Challenge etc
- Deep Sea Fishing
- Paintball and laser skirmish
- Skydiving
- Microlight Flying

The Central Coast region has a wide range of experiences that appeal to visitors from many market segments. The following are considered the regions hero experiences and were identified in the 2010 Destination Management Plan.

Theme	Experience
Nature	Visiting the National Parks, cleanest beaches, bike tours, where five waterways meet and breathtaking scenery
On the Water	Diving, fishing, canoeing, cycling on the waterfront, coastal walks, waterfront dining, yacht charters, ferry rides
Lifestyle & Culture	Space to breathe, regional yet cosmopolitan, waterfront and the real Australia
Wildlife	Whale watching, pelican feeding, bird watching, interaction with Australian wildlife
Events & Festivals	Sporting, cultural, tourism, education and community events
Adventure	Microlight flying, surfing, kayaking, climbing, biking, horse riding, team building

2.7 Key Imagery and Footage

The most effective way to market the Central Coast region as an enjoyable destination to visit and stay, is through the positioning of powerful imagery and footage that depicts the region's unique selling points.

Promoting the region from a new perspective will help to entice new visitation and potentially reinvigorate repeat visitation.

The Central Coast's new perspective should target the following four key themes, from the air, on the water, following the fun and showcasing proximity.

From the Air

The region's natural habitat is definitely a unique selling proposition and the enormity of the nature that surrounds the region's villages and precincts is very impressive from the air. Use aerial footage or photos to show the expanse of natural habitat in the region, highlighting the undeveloped countryside, the river and inlets and of course the beach. Capture the view from a range of aerial options including, hot air ballooning, helicopter, hill top or aircraft.

On the Water

Water based experiences are core to the visitor offering on the Central Coast. Update imagery to showcase water based experiences with a focus on the river, inlet and beach.

Profile the different types of water experiences including canoeing around the inlets, sailing, power boating, surfing and stand-up paddle surfing.

Following the Fun

Sell the region as more than a family destination but somewhere that is fun for everyone. Use imagery that highlights the enjoyable times that people of all ages and segments (couples, groups, business, events) have in the region. Highlight all settings, the beach, the country and the natural environment of the area.

Showcasing the Proximity

The region's proximity to Sydney should be leveraged as much as possible, showing the large Sydney market just how accessible the Central Coast is.

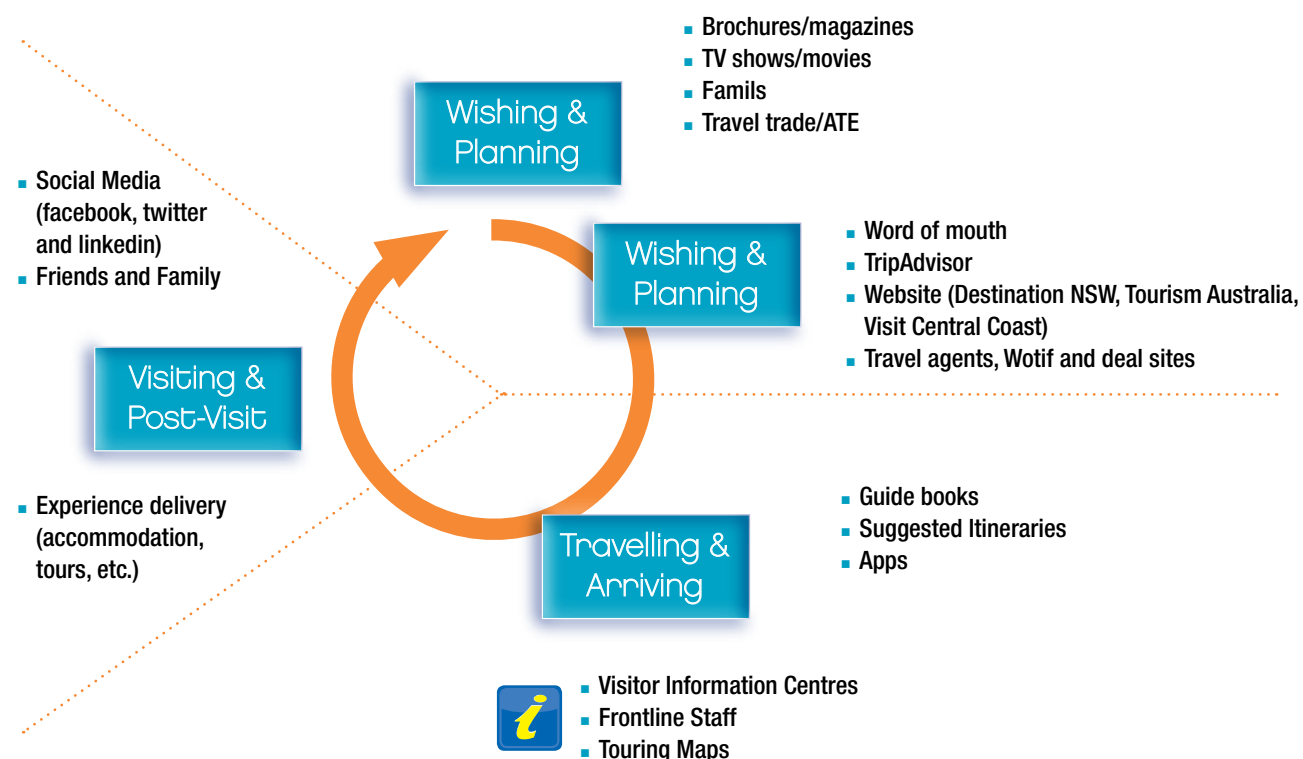
Use footage via social media channels to visualise the short journey and show visitors that in just over an hour the hustle and bustle can be behind them and they can be settled into the calm, natural setting of the Central Coast.

2.8 Communication Channels

Communication channels are an essential component of information delivery and uptake in attracting target and emerging markets. Figure 3 below shows the break down of key messaging tools used at different stages of the trip planning cycle.

To successfully reach Central Coast's target audience, Central Coast Tourism must be able to relay its key messages via relevant communication channels throughout the visitor experience. This will help influence the decision making processes that lie behind their desires, motivations and subsequent travel actions.

Figure 3: Channel Analysis



Section 3: Opportunities For Growth

3.1 Emerging Consumer Trends

3.1.1 Global Consumer Trends

A Henley Centre Highlight Vision Report (2012), titled *Future Traveller Tribes* discusses future travel trends including developing technologies and introduces the concept of 'traveller tribes'.

Over the coming ten to fifteen years, the following three key areas of technological development have been identified, which will facilitate a more traveller-centric travel experience.

Digital personal identities based on **easily accessible, up-to-date customer information** will make the provision of personalised service accessible to many travel providers.

An ability to **offer travellers up-to-date, real time information when and where they need it** via new communication technologies (such as mobile personal devices and the internet) has the potential to transform and streamline the journey.

Finally, the way in which **customers are interacting with technology** is developing, and the increasing use of social computing and the growing sophistication of visual technologies may be harnessed to improve the travel experience.

The four tribes presented in the report do not represent a comprehensive segmentation of future travellers, but they have been selected for discussion from a wealth of potential groups because social, economic and demographic trends indicate that they will be significant in number in the future, and because they present the most interesting challenges to destinations.

■ Active Seniors

In 2020 this tribe will be aged between 50 and 75. As the global population ages, there will be an unprecedented number of older people travelling. With advances in science and medicine, this group will be healthier and more active than previous generations of the same age. With higher disposable incomes, many will be taking holidays and short breaks to relax and enjoy the freedom of retirement.

■ Global Clans

A reflection of the growth in global migration and the resulting increase in the number of individuals and groups travelling internationally to visit friends and family for holidays or to reconnect. A challenge for destinations is meeting the needs of young children, parents, grandparents and even great grandparents all travelling together.

■ Global Commuters

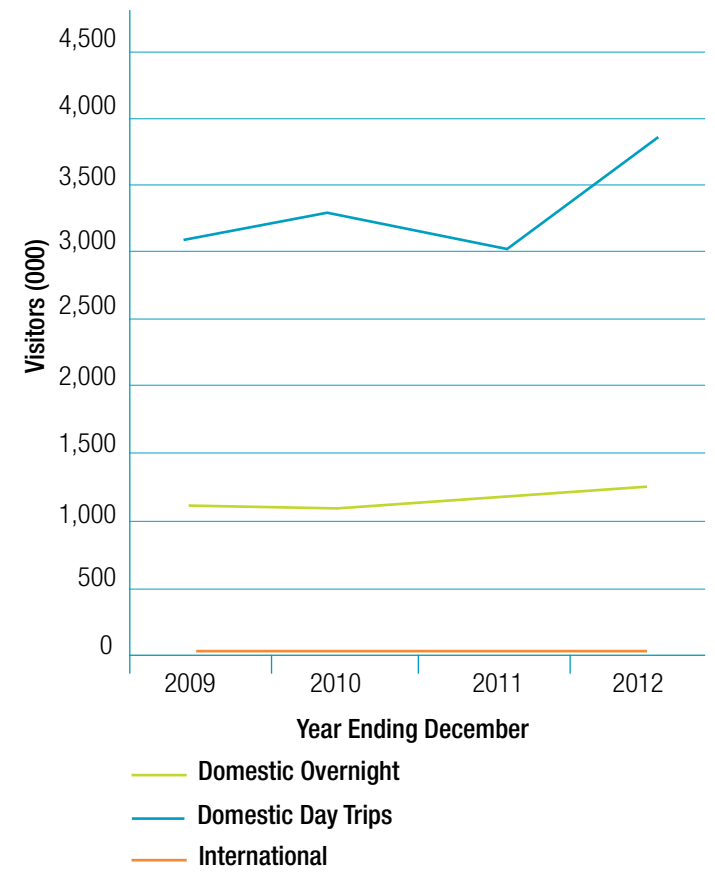
As members of the family increasingly live and work in regions, they will take advantage of falling travel costs and flexible work styles to travel further and see more. To maximise time spent together they will make the most out of their time spent travelling. Convenience of booking, ease of access and constant technological connection will be high on their list of needs.

■ Experienced Travellers

Senior company staff travel more frequently and extensively overseas. With higher expectations of service, they are looking for something truly unique to the place they visit. This is creating increased demand for luxury and highly personalised service that meets and even pre-empt their needs. A streamlined and time efficient journey will be paramount, as will the desire to both work and relax.

3.2 Key Source Markets and Consumer Segments

Figure 4: Domestic Overnight, Domestic Day & International Visitors



3.2.3 Visitors

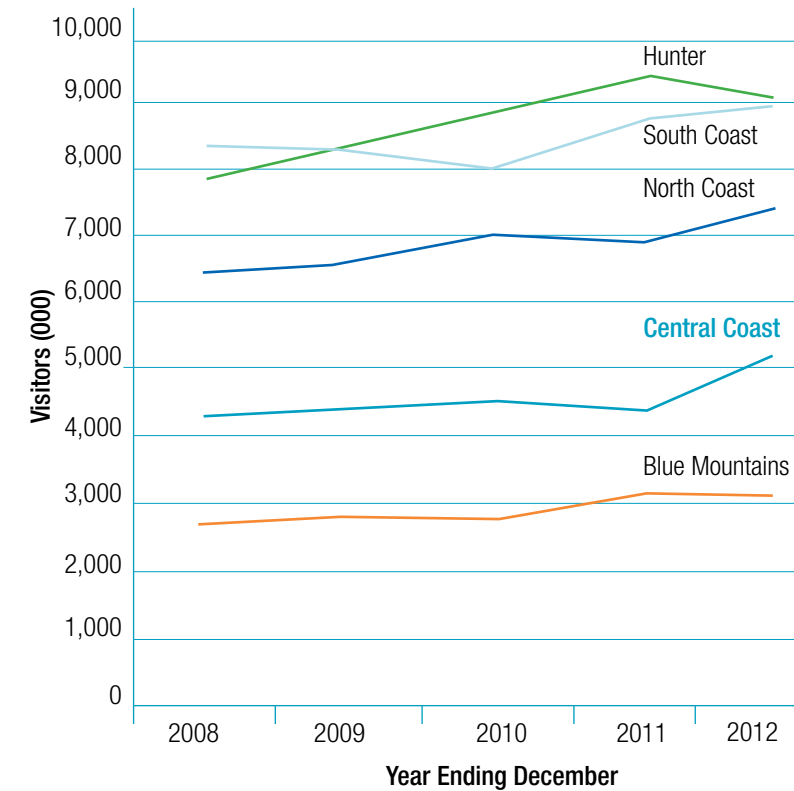
In 2012 (YE Dec), the Central Coast received approximately 1,264,000 domestic overnight visitors (Figure 4) and 3,550,000 domestic visitor nights. This is an 8.1% increase in visitors and a 0.4% increase in nights from 2009, however it should be noted that in the past year there has been a 5% increase in visitors and 1% decline in visitor nights. In total, Sydney residents represent 64% of the Central Coast's domestic overnight visitors.

Daytrip visitors have also seen a significant increase over the past 4 years, with 3,814,000 daytrip visitors in 2012, signifying a 21% increase since 2009, and a 26% increase since 2011.

In terms of international visitors the Central Coast received 32,800 international visitors in 2012, down by 0.3% in 2009 and 16% on 2011.

In comparison with the region's competitors, Central Coast, like North Coast, has seen an increase in visitation between year end 2011 and year end 2012, while competitors such as Hunter have decreased visitation (Figure 5).

Figure 5: Visitation Against Competitors



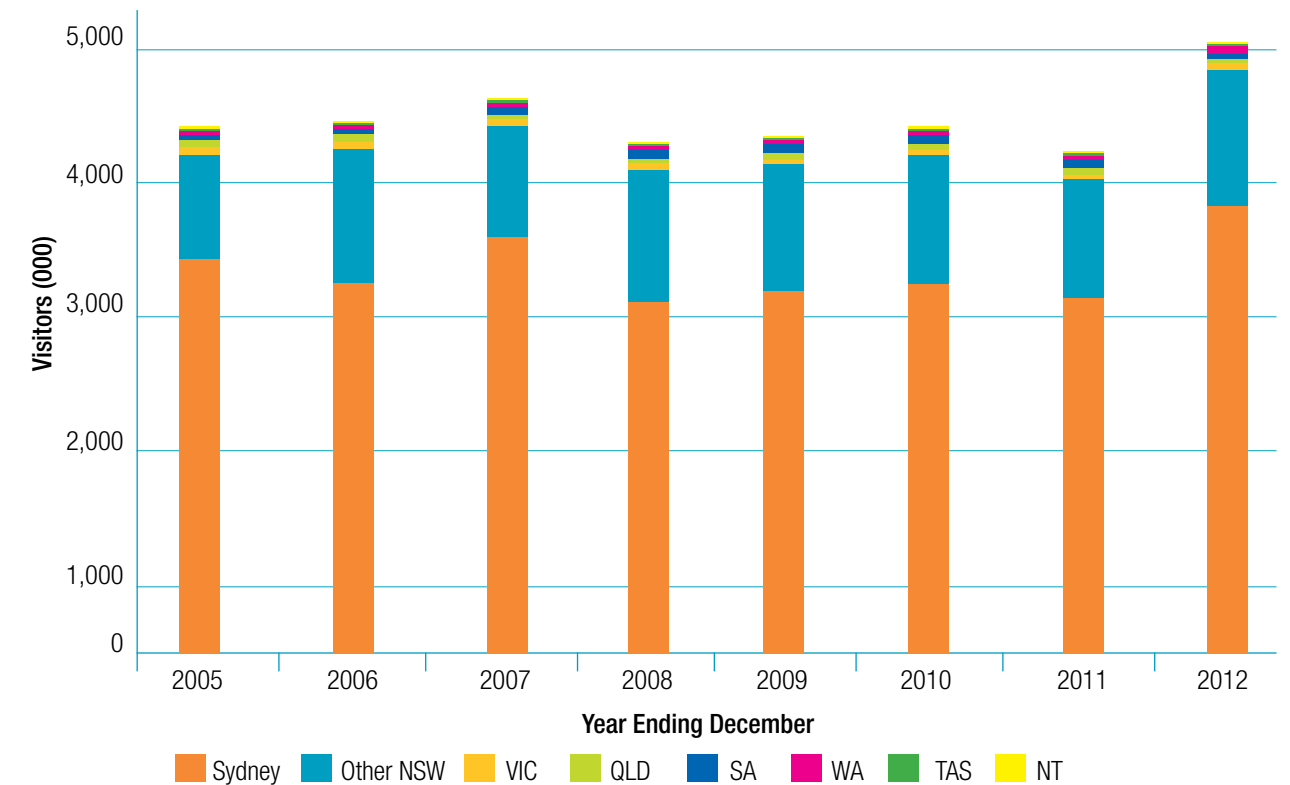
Source: Tourism Research Australia, NVS and IVS Data, Year ending December 2008 - 2012

3.2 Key Source Markets and Consumer Segments (cont.)

3.2.4 Origin of Visitors

According to Tourism Research Australia NVS data (Central Coast YE 2012) 96% of all domestic visitors (overnight and day trip) to the Central Coast are from NSW with 73% of these visitors coming from Sydney.

Figure 6: Origin of Domestic Visitors



Source: Tourism Research Australia, NVS Central Coast Data, Year ending 2005 - 2012

In terms of international overnight visitors, Destination NSW data for YE 2012 shows the top three countries of origin to the Central Coast include New Zealand (26%), the United Kingdom (21%) and the United States (10%). The Asia market shares a combined total of 14%.

Figure 7: Origin of International Overnight Visitors to Central Coast

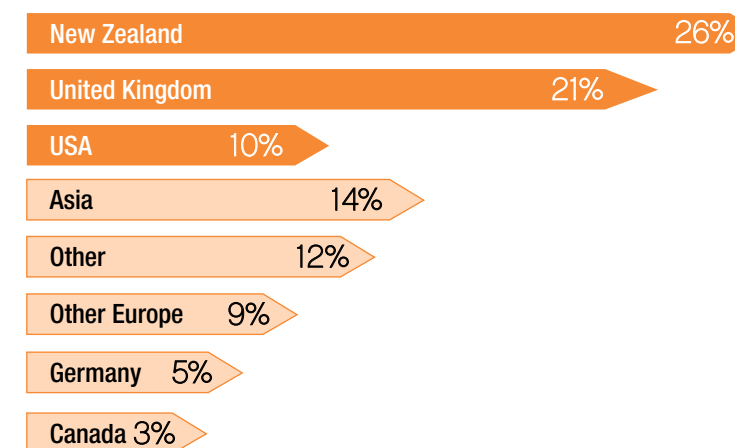
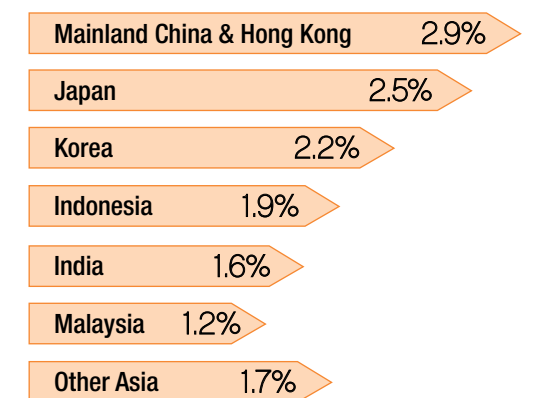


Figure 8: Breakdown of Visitors from Asia



Source: Destination NSW, Central Coast Year ending December 2012

Figure 8: Target Markets for Growth

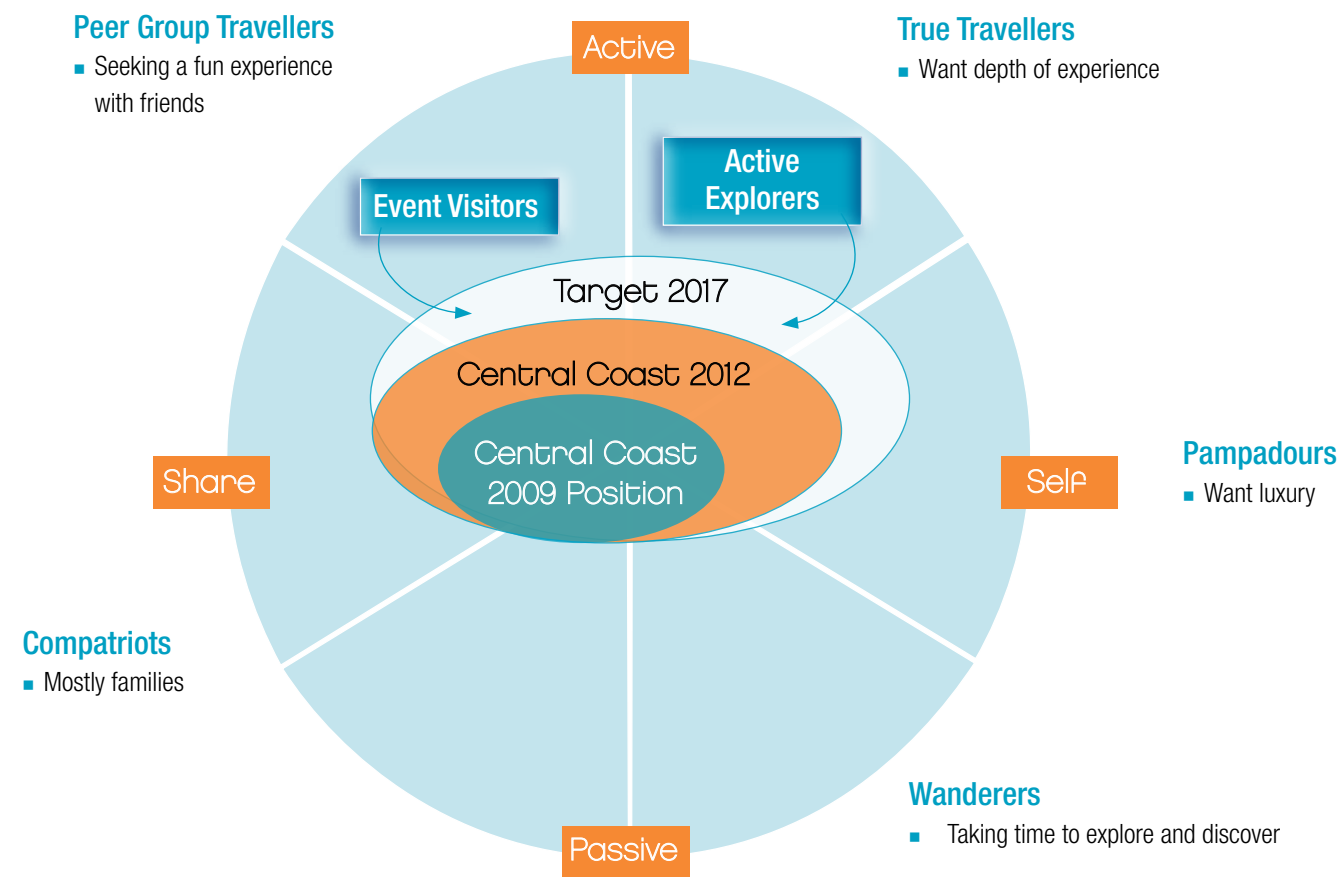
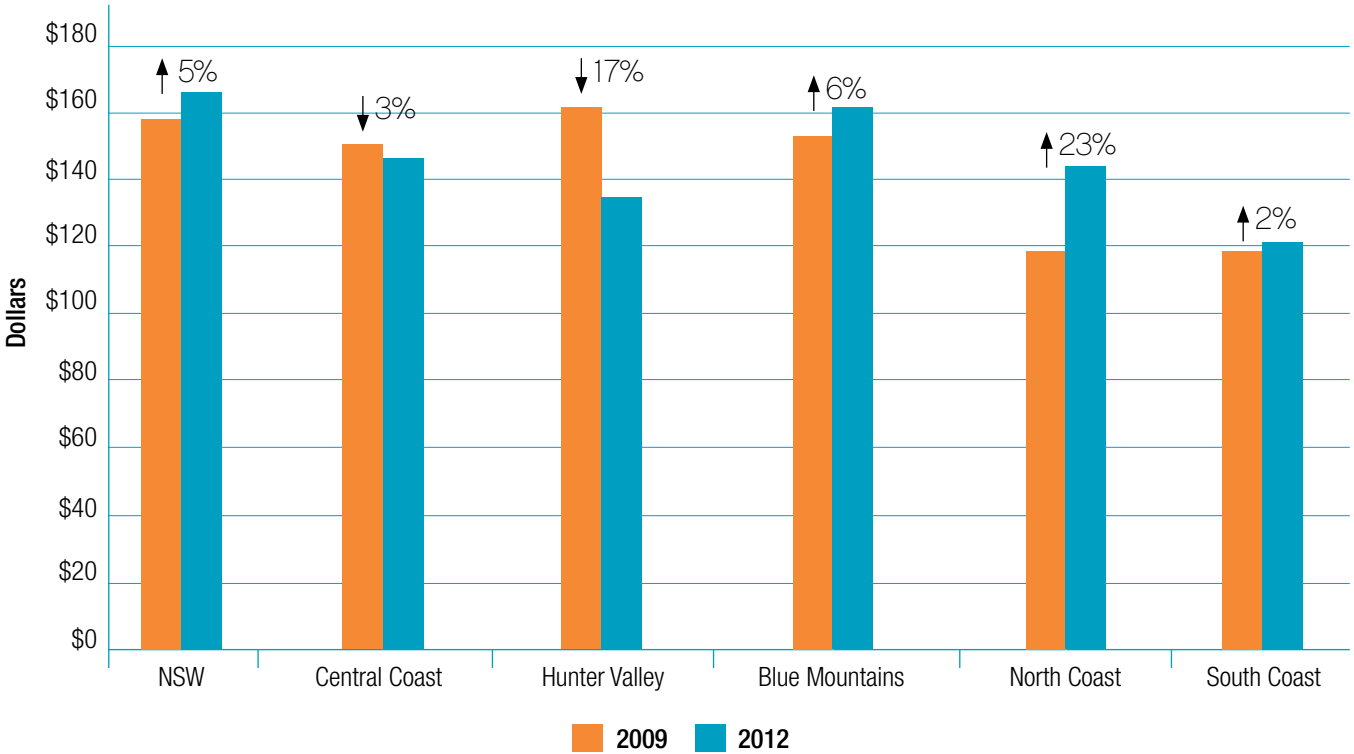


Figure 9: Average expenditure per visitor per night (domestic overnight visitors) in the Central Coast - Comparison between 2009 and 2012



Source: Destination NSW Regional Snapshots for Year ending December 2009 and 2012

3.2.8 Demand

Visitor Perceptions

A priority from the 2010-2013 Destination Management Plan was to shift negative perceptions of the destination.

While there remains an impression locally of negative perceptions, there is no evidence to support this concern. On the contrary the Trip Advisor comments on the destination are overwhelmingly positive.

The 2013-2017 Destination Management Plan recognises:

It is important for the destination to provide excellent customer service and exceed expectation that will encourage positive feedback (either by word of mouth or mouse) creating positive visitor perceptions.

“Very pleasant seaside walk, lovely views, and great photos of the rather brief history of the settlement...”
- December 2012



“Beautiful beaches and wonderful shops, easy drive from home, just as lovely in the winter months, although not for swimming, great for a beach walk every day too.”
- May 2013



“Terrigal has so much to offer, many places to eat and drink, listen to live music, great hotel views of the bay and ocean.”
- December 2012

“Just wanted to say an enormous thank you for an amazing day at Treetops.
My husband and I had a blast and our two children Elani and Jazzy had the time of their little lives. Hannah was beyond incredible and we wanted to sing her praises for going out of her way to assist our 3-year-old on the course.”
- October 2012

“Stunning evening at Avoca beach”
-April 2013



3.2 Key Source Markets and Consumer Segments

3.2.9 Growth Potential

To grow and prosper as a destination, it is vital that the product meets the needs of the market. As such, it is recommended that the following emerging markets be considered as key target areas for growth for the Central Coast region:

Nature-Based Tourism

Interest in nature-based tourism is growing across Australia, with Tourism Australia estimating in the year ending September 2012 there were approximately 3.4 million international nature visitors to Australia (61% of all international visitors). In that same year, there were 13.8 million domestic overnight trips (19% of all domestic trips) that included a nature-based activity.

For the Central Coast region, a 3% increase in participation of nature-based activities by domestic overnight visitors has been observed over the last five years.

With a plethora of nature-based opportunities available on the Central Coast, such as the Old Great Northern Road in the World Heritage Listed Dharug National Park, whale watching, coastal beaches, etc. and the increasing demand for nature-based experiences by visitors, the region is well placed to grow in this respect.

Adventure Tourism

Australia has experienced an overall 10% increase in the number of visitors participating in adventure-based activities. Approximately 1.3 million domestic overnight visitors participate in adventure activities. This equates to approximately 10% of all the domestic overnight visitors to the Central Coast.

Interestingly when examining the activities undertaken there has been a slight decline in visitors listing 'surfing' as an activity undertaken on their most recent trip which included the Central Coast. Leveraging the regions' key assets and increasing engagement in activities is a key priority of this Plan.

Event Tourism

Events provide opportunities to increase direct expenditure at a destination, contribute substantially to a destination's range of tourist attractions, facilitate media coverage, promote awareness of the destination for future visitation and lead to the construction of new facilities and infrastructure.

The Central Coast has seen an increase in visitors attending key events and in overall events tourism since 2008 according to Tourism Research Australia YE December 2012 Data (38% increase).

With significant access and infrastructure developments currently underway both in the region and nearby (such as the Newcastle airport) the Central Coast has the capacity to leverage this growth by attracting new significant events which will increase visitation from Sydney and South East Queensland.

Overnight Short Breaks

The short break market has increased globally over the past few decades, however within Australia faces major competition particularly from cheaper international destinations. Nevertheless, in NSW alone the short break market contributes almost \$1 billion in expenditure to the regional NSW economy.

A short break visitor is classified as a visitor who spends between one and three nights away from home for holiday purposes. Short breaks are characteristically weekend or mid week getaways taken in nearby regional or national destinations. Convenient access is a determining factor in destination choice, with short break travellers choosing destinations within a maximum two hour drive distance. Key motivations for taking short breaks include relaxation and rejuvenation as well as the pursuit of a specific activity or interest.

Visiting Friends and Relatives

In the YE December 2012 over 47% (2.4 million visitors) of total visitation to the Central Coast was driven by the visiting friends and relatives market*.

This market has grown by 22% over the past five years. The highest growth amongst this market was international visitation, with international tourists visiting friends and relatives in the region increasing over five years by 42%. Domestically, overnight visitation increased by 11% and day trips by 25%.

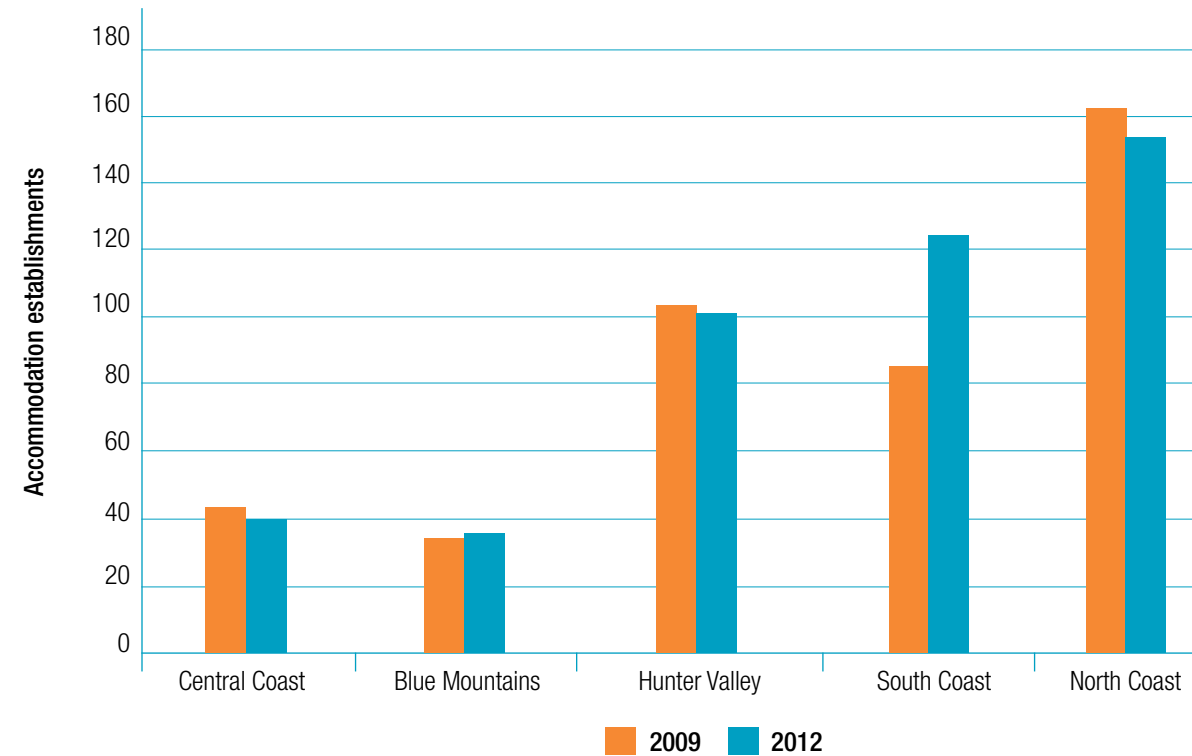
* Source: Destination NSW Central Coast Year Ending December 2012

3.3 Key Infrastructure

Accommodation

In comparison to its competitors, Central Coast has significantly less accommodation establishments and has seen a slight decrease in the total number of establishments since 2009. Nevertheless, the planned Revitalisation of The Entrance, Mt Penang Tourism Precinct and Gosford Waterfront precinct will go towards addressing this deficit. Further anticipated future investment and product development opportunities include hotel developments at the Mariners Centre of Excellence, Australia China Theme Park, The Springs Golf Club and diggers@theentrance.

Figure 10: Comparison of Competitors in Accommodation Establishments



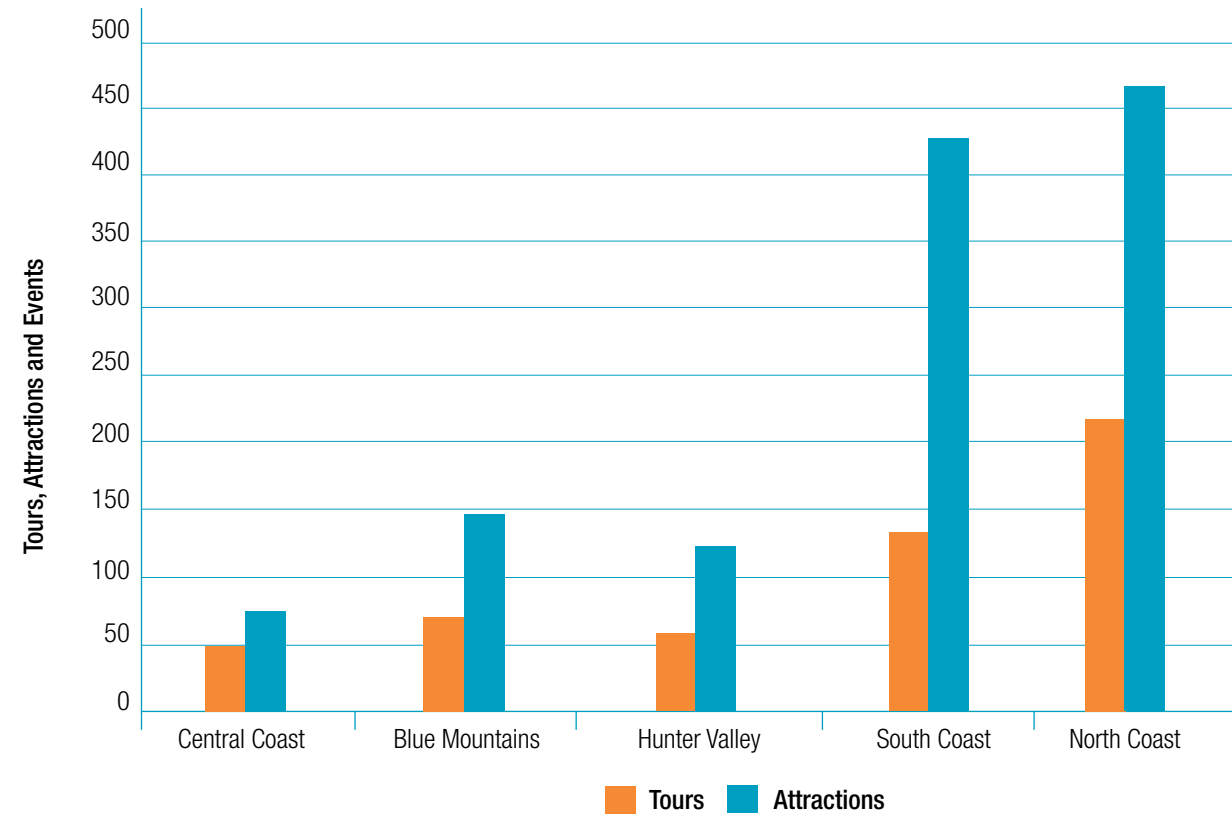
Source: 8635.1.55.001 - Tourist Accommodation, Small Area Data, New South Wales, December 2012

3.3 Key Infrastructure (cont.)

Tours & Attractions

A review of the Australian Tourism Data Warehouse (ATDW) data via the Destination NSW website shows that the Central Coast region has 47 tours available and 76 listed attractions. Recognising the limitations in this data set and the size of the regions, but nevertheless, in comparison with its competitors, Central Coast still has significantly less tours and attractions than its competitors being promoted. Strategies to increase operator participation in online promotional tools (such as ATDW) and growing the number of experiences available will help to drive greater spend per day.

Figure 11: Comparison of Competitors in Tours, Attractions and Events



Source: www.visitnsw.com.au

Below is a summary of key infrastructure identified through the Destination Management Planning process.

Existing Amenities	Description
Natural Adventures	TreeTop Adventure Park, Australian Reptile Park, Glenworth Valley Outdoor Adventures, and Australia Walkabout Wildlife Park are existing and accomplished adventure products which have current and future expansion plans to better engage visitors in nature and provide a greater hinterland and nature experience. The Ex-HMAS Adelaide Reserve is another great attraction for the region, however a greater range and diversity of water-based experiences is still to be desired.
Sports and Events	The Central Coast has a number of established sporting facilities and event venues, most notable are Bluetongue Stadium, Pioneer Dairy Sporting Hub, Mingara Recreation Club and world-class golf courses.
Available Land	The Central Coast, despite being close to an international gateway, is a region that is still showcasing opportunities for real investment, with available land, proactive Local Governments and a growing network of support infrastructure from the National Broadband Network and improving public transport are all on the table.
Recreation Facilities	Complementing the number of great natural spaces on offer, visitors can also make use of a range of the region's recreational facilities including boat ramps, playgrounds as well as a number of walking and bike trails.
Historical and Cultural	The region is home to a number of significant cultural assets including the 5 Lands Walk, the UNESCO World Heritage Listed Old Great North Road and the Norah Head lighthouse and cottages. The region also features National Aboriginal & Islander Skills Dance Association known as NAISDA Dance College, one of Australia's only Aboriginal Dance Colleges.
Beginner's Paradise - a great place to start	The region offers a range of experiences that are suited to first timers, from learn to surf schools, to horse-riding, first dive courses or for your first time skippering a boat. A range of accommodation can also be included that suits the needs of those taking their first family short-breaks.

3.4 Planned Infrastructure

A number of infrastructure projects have been proposed and are in varying stages of development in the Central Coast region. Outlined below are key infrastructure improvements which will provide direct benefits to the region.

Wyong Regional Airport

An independent survey of 400 people, commissioned by Wyong Shire Council in February 2013, shows 67% were completely in favour of the Wyong Regional Airport concept, while 84% were 'somewhat supportive and fully in favour'. The Wyong Regional airport will have a larger runway than the airports currently in service at Newcastle and the Gold Coast, and will be capable of supporting Boeing 737 flights to all domestic capitals, as well as international flights to New Zealand. The airport is estimated to bring in \$100-\$200 million a year to the local economy and would help create permanent jobs for large numbers of the Central Coast's residents.

Australia China Theme Park

The Chinese Cultural Village will comprise seven sections including: China City Gate Entrance, Tang and Song Academy, Water Towns in South China, Wyong Theatre, Panda Paradise, Royal Villa and Thanksgiving Temple. The first stage of construction is expected to start in 2015 and include the City Gate, Temple, Water Town and Academy. The remainder of construction is expected to start in 2018. This project has received great support from the Foreign Affairs Office of the Shanghai Municipal People's Government and Office of Overseas Chinese Affairs of the Shanghai Municipal People's Government. This project is expected to inject another \$500 million into the local economy and generate a further 1,500 to 2,000 local jobs.

Gosford Waterfront Project

The Waterfront Development at Gosford Masterplan identifies a multi staged development, each of which has been guided by the principals listed by the community in the "Our City Our Destiny" Masterplan. The initial stages consists of:

- Regional Performing Arts and Conference Centre
- Commercial Office space
- The extension of Baker St and a hotel development to support business tourism
- Gosford City Park

3.5 Forecast Accommodation Demand

Based on the available data in the Australian Bureau of Statistics (ABS) - Survey of Tourist Accommodation (2005-2012) for Hotels, Motels and Serviced Apartments Figure 13 (page 30 overleaf) shows the trend in room supply and demand for the Central Coast over the past seven years. The 'Guest Nights' figures from 2013-2020 are based on the Tourism Forecasting Committee (TFC) predicted growth rates in Domestic and International room nights in commercial accommodation for NSW (applied to the region). The 'Room Supply' is based on forecast increased supply from projects either underway or planned from information provided to EC3 Global at the time of publishing this report.

The forecast visitor nights in commercial accommodation demand for the Central Coast is estimated to grow at 1.4% per annum, at this rate the average room occupancy for the region would reach 59% by 2020 based on current occupancy rates. While overall this shows that the current room stock would be sufficient to retain occupancy, rates are below the industry standard for commercial investment of an annual average of 65-70%. This does not account for growth in particular star graded room stock as the supply and demand for rooms at this level is not available through the Survey of Tourist Accommodation (ABS).

CASE STUDY – SUNSHINE COAST AIRPORT

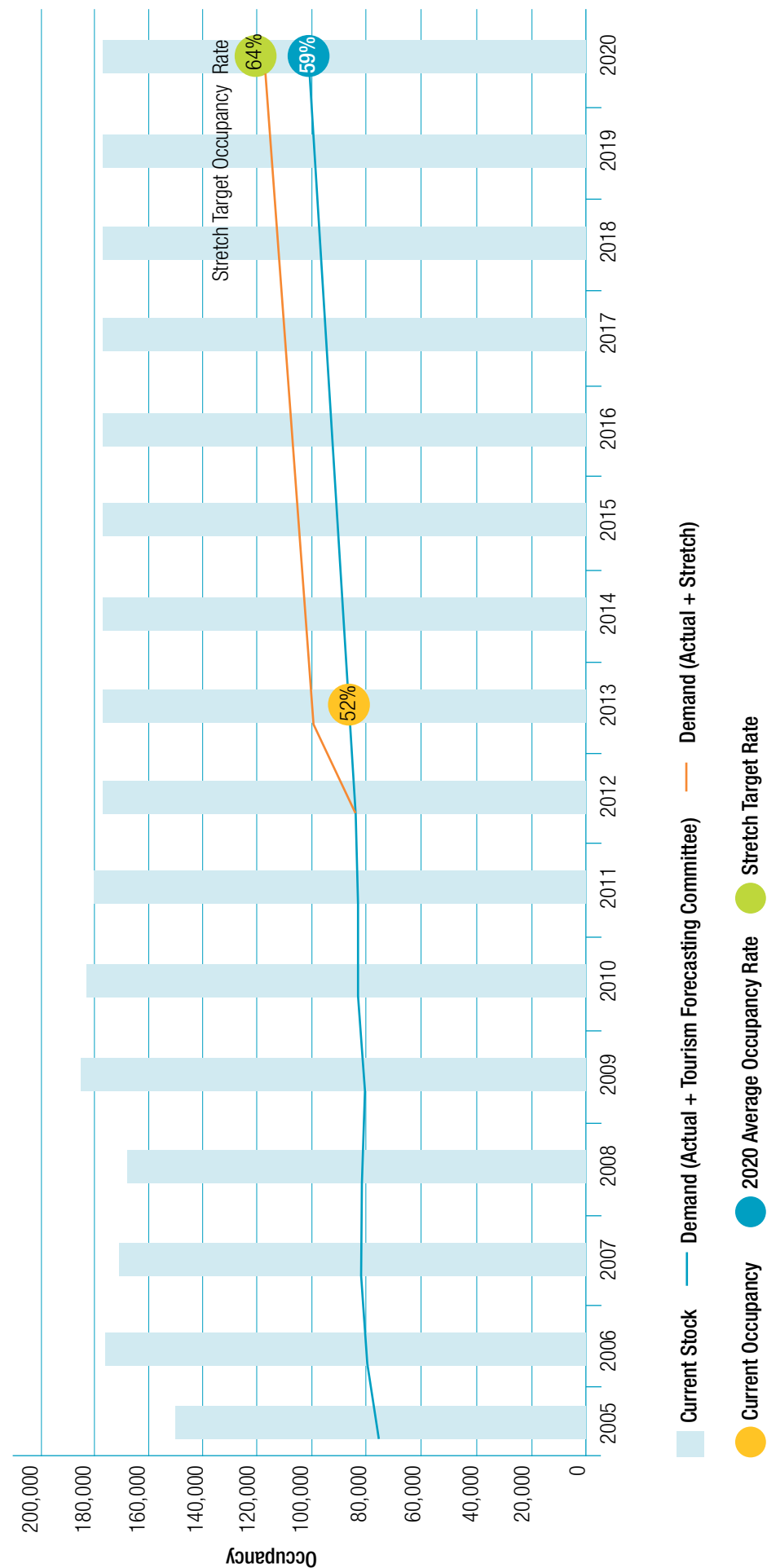
Sunshine Coast Airport is owned, operated, managed and developed by the Sunshine Coast Regional Council. The Sunshine Coast encompasses the coastline from Caloundra and the Glass House Mountains in the south, through to Noosa in the north and west to the Blackall Ranges. The region has a population of 316,858 with the population of the total catchment area (including surrounding areas) around 600,000.

The airport has two runways, with a third runway to be built prior to 2020. Daily domestic services to Melbourne and Sydney are provided through Virgin, Jetstar and Tiger Airways as well as a newly established seasonal international service flying between the Sunshine Coast and Auckland with Air New Zealand commencing in 2012. The airport handles around 87,000 aircraft movements per annum and has the capacity to handle 900,000 passenger movements per annum. 1.7 million passengers are expected to pass through the airport in 2019/20. In 2012 the Sunshine Coast Airport was awarded Australian Major Airport of the Year.

The Sunshine Coast currently sees 385,000 domestic overnight visitors arriving by air transport and 2.4 million who drive, as opposed to 34,000 and 1 million respectively for the Central Coast*.

*SOURCE: TRA Regional Tourism Profiles 2011/12

Figure 12: Forecast Accommodation Data to 2020 - current occupancy and stretch target rate for 2020



3.6 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> 2 times the waterfront of Sydney Harbour including beaches and waterways Natural beauty – national parks, lakes, waterways, headlands, beaches and hinterland Quality and affordable accommodation Attractions & facilities (e.g. Kooindah Waters golf course voted in Golf Digest top 100 courses for 2012; wildlife, adventure) Proximity to Sydney & Newcastle (closest beach destination 90mins) Education and training facilities Current festivals & events and potential for future events 'Best of both worlds' – sea change and tree change Cultural assets (incl. marine heritage) Available land for development Strong community spirit Areas designated for tourism already 	<ul style="list-style-type: none"> Significantly less accommodation than Hunter and South Coast Accessible by rail but not air (90% drive) Lack of awareness or poor perceptions of 'Central Coast' International visitor growth but 61% of international visitors are VFR Community infrastructure and activities Lack of critical mass – mostly small operators Seasonality (Peak in January, Fall in June) Perceived lack of work and activities to retain young people in the area Lack of all-weather built attractions Investor concern at the level of red tape limiting timely development Community concerns over lack of tourism benefits and negative impacts
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 (incl. hinterland) Education and business tourism Positive parochialism - do business locally Events – sports, youth and music (in nature) Emerging 'adventure' brand and cultural tourism market Potential for waterfront accommodation development Packaging and trail development Climate for an active lifestyle – walking, riding, sports Some catalyst projects can generate solutions to assist youth unemployment Key Infrastructure development – High Speed Rail, Regional Airport, M1/M2 Road Link 	<ul style="list-style-type: none"> Lack of a clear identity – stuck in the middle Infrastructure – meeting the growth Losing Sydney visitors to Blue Mountains, South Coast and the Hunter Car dependent travellers (limited internal transport) Environmental degradation Planning constraints Community attitude blocking key tourism and related development Lack of government support to help fund major projects Potential for water to re-emerge as an issue in the next 5 years

4.1 Vision, Mission and Goals

Vision
Build on the Central Coasts' competitive strength of its location by the water and become a leader in natural adventure and event experiences that act as a catalyst to year round visitation.

Mission
Enhance the Central Coast's natural advantage and offer visitors an antidote to city life to drive a sustainable visitor economy, enrich community assets and create local employment.

Natural Advantage

- ✓ Proximity to Sydney
- ✓ Nature on the doorstep
- ✓ Great beaches and waterways
- ✓ Sporting and Event facilities
- ✓ Village/community atmosphere

Goals and Objectives

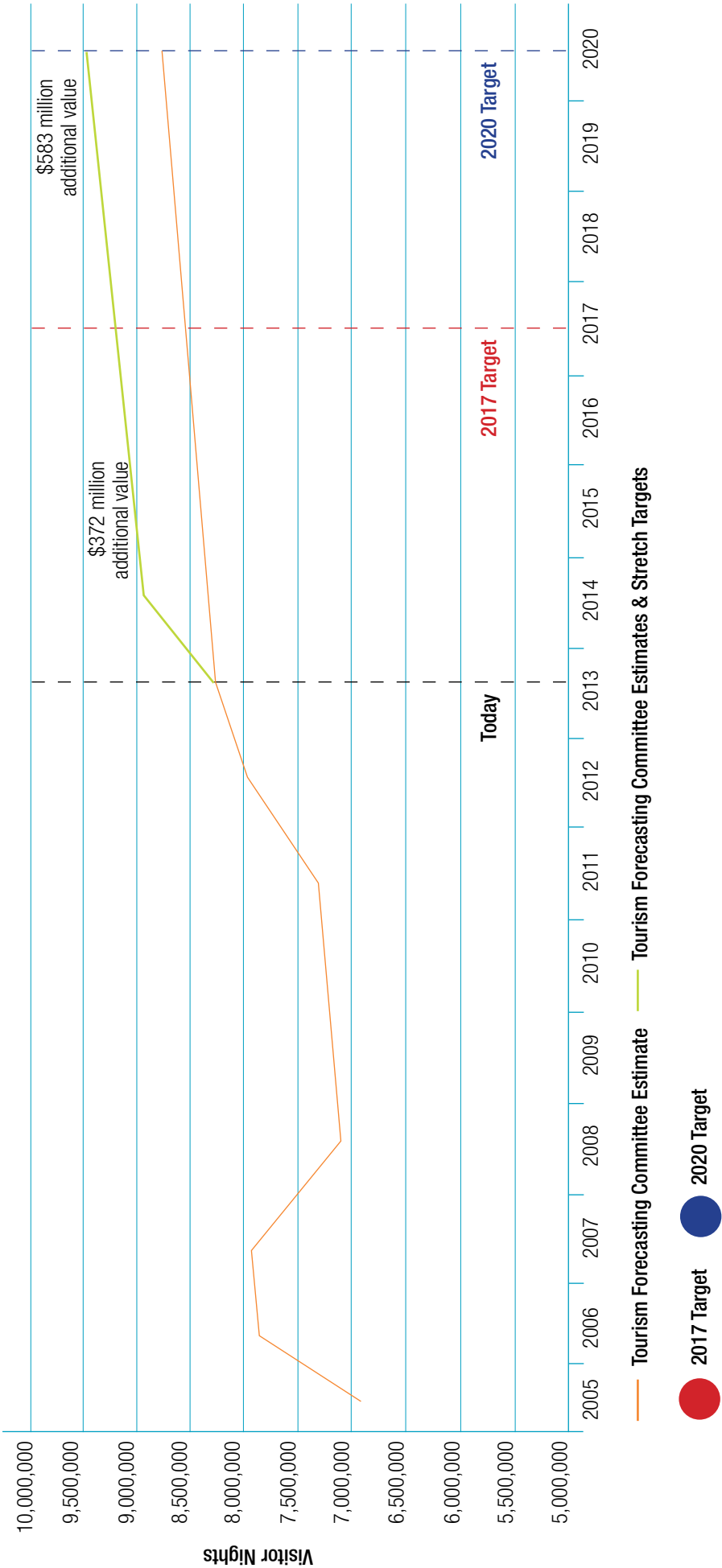
- ✓ **Increase the average length of stay by 5%** across all markets from 2.8 nights to 3 nights
- ✓ **Increase the average spend per visitor by 10%** growing domestic overnight from \$143 to \$157; international overnight from \$41 to \$45; and domestic day from \$70 to \$77
- ✓ Increase our **share of the NSW conference and events market by 3%**
- ✓ **Increase the range of visitors that disperse their spend throughout the year** (More 'active' True Travellers and Peer Group visitors and those travelling for a purpose)

- Measures of Success**
- ✓ Increased visitor nights (mid-week, in shoulder seasons)
 - ✓ Increased visitor expenditure
 - ✓ Grow our share of Sydney short breaks
 - ✓ Increased value of VFR from building local pride

Goal	Current Position**	2017 Additional Benefit	2020 Additional Nights	2020 Additional Benefit
Increase average length of stay by 5% per annum	<ul style="list-style-type: none">3,550,000 domestic visitor nights565,997 international nights	<ul style="list-style-type: none">\$123 million in domestic overnight spend\$9 million in international spend	<ul style="list-style-type: none">5% Growth509,897 domestic visitor nights251,126 International visitor nights	<ul style="list-style-type: none">\$188 million in domestic overnight spend\$17 million in international spend
Increase average spend per night (p/n) by 10% by 2020	<ul style="list-style-type: none">Domestic O/night \$143 p/nDomestic Day \$70International Overnight \$41 p/n	<ul style="list-style-type: none">Domestic Overnight \$101 million*Domestic Day \$72 million*International \$9 million	<ul style="list-style-type: none">Increase by 10%Domestic O/night \$30*Domestic Day \$15*International \$9*	<ul style="list-style-type: none">Domestic O/night \$163 million*Domestic Day \$86 million*International \$16 million*
Increase share of NSW conference & events markets by 3% by 2020	<ul style="list-style-type: none">Domestic O/night 3% share (106,620 visitor nights)Domestic Daytrip 4% share (165,920 day visitors)International O/night 1% share (6,863 visitor nights)	<ul style="list-style-type: none">Domestic Overnight \$21 millionDomestic Day \$7 millionInternational \$2 million	<ul style="list-style-type: none">Increase Share by 3%Additional 125,635 domestic visitor nightsAdditional 150,130 domestic day visitorsAdditional 30,820 international visitor nights	<ul style="list-style-type: none">Domestic O/night \$25 millionDomestic Day \$9 millionInternational \$3 million
Grow our share of True Traveller and Peer Group markets by 1% of NSW market by 2020	<ul style="list-style-type: none">True Traveller - current share 4.83% of NSW market (390,500 domestic visitor nights & 225,770 day visitors)Peer Group - current share is 4% of NSW market (461,500 domestic visitor and 266,819 day visitors)	<ul style="list-style-type: none">True Travellers \$13 millionPeer Group \$15 million	<ul style="list-style-type: none">Increase Markets by 1% of NSW marketTrue Travellers - 86,985 additional visitor nights & 45,407 additional day visitorsPeer Group - 120,667 additional visitor nights & 63,809 additional day visitors	<ul style="list-style-type: none">True Travellers \$33 millionPeer Group \$43 million
Total Additional Value				\$583 million 8,042 FTE Jobs

* Including annual inflation of 2.3% ** Current position based on 2012 figures

Figure 13: Forecast Visitor Nights to 2020 showing TFC Estimates and TFC with Stretch Targets



** Figures include domestic visitor nights, international visitor nights and day visitors (counted as one night)

4.2 Enablers of Success

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

Strategic Tourism Infrastructure

This DMP recognises the important role a regional airport and investment in accommodation will play in the future and supports the Tourism Opportunity Plan and its recommended projects. These projects should continue to progress as key priorities for adding value to the region's tourism offer. It is recommended that a Tourism Investment sub-committee of the Regional Economic Development Employment Strategy (REDES) prepare an investment profile highlighting the future infrastructure needs building on the Tourism Opportunity Plan.

Brand Development

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

Build Industry Capacity for innovation

Build and develop industry capacity for innovation by running an annual conference with neighbouring RTOs to share insights and examine trends.

Develop an 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. This strategy needs to clarify the roles of key players including Councils and the RTO, and establish criteria for each organisations involvement.

Leveraging the Legendary Pacific Coast Touring Route (LPCTR)

Linking Brisbane and Sydney, the LPCTR is the primary domestic and international promotion vehicle for the self drive market. Increasing operator participation through industry workshops will help boost the regions presence in the domestic and international markets.

Establish Strategic Alliances

Recognising that tourism is just one of the region's economic drivers, continued cooperation is required between Councils, Central Coast Tourism, the Chambers of Commerce and Regional Development Australia to leverage economic development and promotional activities as well as encourage industry engagement.

Visitor Research and Reporting

Develop an events tracking monitor to provide timely reporting on visitation, economic benefit and event impact.

Accommodation Investment

Attracting investment in new accommodation through a targeted investment prospectus showing future accommodation needs.

Air Access

A key enabler to long-term growth of the region is direct air access. Increased accessibility options like the proposed Zone 3 Regional Airport in the Wyong LGA will attract new economic opportunities and increase local employment.

Quality Accommodation

It is vital that the industry lift the standard of the accommodation experience through embracing industry-led accreditation and continuous improvement.

4.2.1 Priority Project 1

TOP Catalyst Projects

In 2013, the Central Coast Tourism Opportunity Plan (TOP) was prepared for the region to identify and align viable catalyst tourism projects. The incorporation of both local town planning schemes, state government strategies and plans is required to determine the way forward.

The TOP identified 44 investment and infrastructure opportunities, which are listed in Appendix 6 (page 46), of which five are classified as catalyst projects.

The five catalyst projects identified in the TOP are:

- Mt Penang Tourism Precinct
- The Waterfront Development at Gosford
- Motorsport Precinct
- Pioneer Dairy Sporting Hub
- Tourism Hub at the Entrance

A description of each of these projects is provided on page 12 and 13.

To progress these projects forward, it is recommended that a Tourism Investment Sub-committee be established under the Strategic Implementation Group as part of the Regional Economic Development and Employment Strategy. This sub-committee would be tasked with overseeing the development of these projects and undertaking the key recommended actions which are detailed on the next pages.

Immediate Actions

- Identify the first of the five TOP Catalyst Projects for which to seek funding
- Prepare a funding submission and investment profile to build a case for the development of the Catalyst Projects

Central Coast NSW - Regional Economic Development and Employment Strategy (REDES).

REDES is the long term strategy which aims at delivering sustainable economic development & jobs growth for the Central Coast region. Regional Development Australia Central Coast is leading the implementation of the REDES, supported by the NSW Government, Gosford City Council & Wyong Shire Council.

A number of key strategies are detailed to deliver the required outcomes for the region, including a key strategy for the provision of infrastructure to support economic growth. Action plans developed by Agencies and organisations support the strategies and are reported on a regular basis.

4.2.2 Action Plan - TOP Catalyst Projects

Legend: **CCT** (Central Coast Tourism); **CCRDC** (Central Coast Regional Development Corporation); **CHC** (Chambers of Commerce); **DPC** (Dept Premier & Cabinet) **DRET** (Dept Resources, Energy & Tourism); **GCC** (Gosford City Council); **RDACC** (Regional Development Australia Central Coast); **TETCM** (The Entrance Town Centre Management); **WSC** (Wyong Shire Council).

	Action	Responsibility	Timing
Motorsport Precinct	Wyong Shire Council and Central Coast Tourism to work with existing land owners and the Darkinjung People to identify a suitable location for the Motorsports Precinct.	Lead: WSC Support: CCT	Immediate 2013/14
	Prepare a Preliminary Social and Environmental Impacts Review of the proposed site including noise, traffic, ecology, water and indigenous cultural heritage assessments.	Lead: RDACC Support: CCT	Medium term 2015/16
	Prepare a Business Case and Expression of Interest document seeking commercial investment (or partnership funding) for the project.	Lead: WSC, RDACC Support: CCT	Medium term 2015/16
Pioneer Dairy Sporting Hub	Seek State and Commonwealth funding to prepare a Site Masterplan for the Sporting Hub.	Lead: WSC, RDACC Support: CCT	Immediate 2013/14
	Prepare a site Masterplan and operational business model for the Sporting Hub including detailed costs.	Lead: WSC, RDACC Support: CCT	Immediate 2013/14
	Lobby State and Commonwealth Governments for the necessary funding for the project through a high quality concept plan.	Lead: WSC, RDACC Support: CCT	Immediate 2013/14
Mount Penang Tourism Precinct	Seek State and Commonwealth funding to prepare a Site Masterplan.	Lead: CCRDC, RDACC Support: GCC, CCT	Immediate 2013/14
	Prepare a site Masterplan and operational business model for Precinct including detailed costs and an economic benefits statement for the community.	Lead: CCRDC, RDACC Support: GCC, CCT	Immediate 2013/14
	Lobby State and Commonwealth Governments for the necessary funding for the project through a high quality concept plan.	Lead: CCRDC, RDACC Support: GCC, CCT	Immediate 2013/14
Waterfront Development at Gosford	Stakeholders to support Gosford City Council to progress Stage One of the Waterfront Development through the development of a Central Coast investment prospectus. This should include the project and its key elements and build a business case, to engage potential investors at every opportunity.	Lead: CCRDC, GCC Support: RDACC, CCT	Medium term 2015/16
Tourism Hub at The Entrance	Stakeholders to support Wyong Shire Council to progress the Tourism Hub at the Entrance as identified in The Entrance Town centre Masterplan through development of a Central Coast investment prospectus. This should include the project and its key elements and build a business case, to engage potential investors at every opportunity including site visits.	Lead: RDACC, WSC Support: RDACC, CCT	Medium term 2015/16

Build a Sustainable Visitor Economy to support Future Investment		Connect People and Places	
<ul style="list-style-type: none">■ Adopt a more coordinated approach across Councils and the RTO to attract and deliver major sporting events as well as Meetings, Incentives, Conferences, Events and the Education market by expanding the role of the Central Coast Regional Events Alliance to include an event attraction sub-committee■ Leverage events that have the potential to have a greater economic impact by engaging other parts of the economy including performing and visual arts, educational, entertainment, cultural and heritage experiences■ Support Councils and private investors to create new places for visitors and locals to experience the natural assets of the region including projects identified in the Tourism Opportunity Plan■ Grow the base of international visitors in partnership with nearby regions (eg Port Stephens, Hunter, Newcastle) and the Legendary Pacific Coast Touring Route■ Build local pride through a local awareness campaign and familiarisation program with the tourism industry■ Support a strong, confident and united industry through regular networking, workshops and events■ Support take-up of industry accreditation and self regulation to deliver a high quality experience for visitors without compromising the quality of life of residents or the conservation of our precious environment and amenity.■ Encourage local operators to develop, renew & revitalise current product & experiences to drive longer stays and repeat visitation■ Secure partnership funding to appoint a Business Tourism and Events Manager to implement Priority Project #2		<ul style="list-style-type: none">■ Build the links throughout the region by the development of improved infrastructure connecting villages, products and experiences supported with better public/private transport options.■ Take a more flexible approach to placemaking utilising the NBN and 'pop up' style infrastructure■ Take a lead in active engagement in social media and other integrated marketing initiatives to reach 'tribes' and influencers of travel to grow niche visitation■ Support the ongoing development of the 5 Lands Coastal Walkway to deliver a year round visitor experience■ Create new scenic iconic Hinterland and (coastal) drives with spectacular lookouts, interpretive signage and new nature walks■ Develop new iconic water trails to show visitors new places and showcase the open and natural spaces. eg: canoe/kayaking, motorised boat trails etc.■ Leverage Council's investment in WiFi and innovative technologies to create immediate response campaigns for visitors■ Develop and launch a new online booking platform that brings accommodation, experiences and events together and work effectively pre-trip and enroute with greater flexibility to respond to consumers wants, needs and desires	
Target more Active Travellers		Activate the Destination and Natural Assets	
<ul style="list-style-type: none">■ Target niche markets who travel mid-week through a social media strategy and other integrated marketing activities■ Utilise the success of the Mariners to promote the destination for sports tourism to capitalise on our extensive sports infrastructure■ Create awareness of the suitability of the region for niche travel markets including Disability/Accessible, Indigenous, Nature Based and Surf Tourism■ Leverage Great Golf Courses of Australia initiative of Tourism Australia to attract a national golf event■ Create a strong events calendar that drives off-peak and mid-week visitation■ Target active recreation visitors and experience seekers from the drive market including fishing, boating, mountain biking, walking, surfing, watersports, diving, golfing etc		<ul style="list-style-type: none">■ Push the soft-adventure experiences of the destination along with accommodation options■ Develop an investment prospectus for ecotourism opportunities including accommodation and attractions■ Showcase all weather experiences to promote the destination as a year round option■ Grow the true traveller segment both domestic and international through new natural adventure experiences■ Further develop amenities for Mountain Biking such as a Mountain Bike Park working with State level partners including Forestry and National Parks	
Staged Roll-out of Priorities			
Year One (2014) <ul style="list-style-type: none">■ Focus on sports and active recreation■ New booking platform■ Research platform for immediate reporting	Year Two (2015) <ul style="list-style-type: none">■ Brand evolution■ Online tracking for events■ New major accommodation property	Year 3 (2016) <ul style="list-style-type: none">■ Build transport connectivity■ Integrated events bookings program■ Australia China Theme Park (Wyang)	2017 - 2020 <ul style="list-style-type: none">■ M1/M2 link■ Wyong Regional Airport (proposed)■ International University (proposed)



4.3.1 Priority Project 2

Central Coast Regional Events Alliance

The establishment of a sub-committee of the existing Central Coast Regional Events Alliance focused on event attraction with a focus on a more co-ordinated approach to attracting and delivering Conferences and events within the region.

Led by Central Coast Tourism and including Council events staff, the sub committee would leverage the regional partnerships between greater Sydney destinations including Port Stephens, Hunter Valley and Hills Hawkesbury to grow the base of meetings, events, conference and education visitors.

A key proponent of this priority project is a targeted social media campaign which aims to leverage the current Central Coast events base to build visitation. Over time this should also include the creation of a conference and events desk with the support of additional funding.

Immediate Actions

- Central Coast Tourism to chair the sub committee of the Regional Events Alliance meeting each quarter.
- To support Central Coast Tourism in event attraction and delivery, councils to nominate key internal contacts for project based support of an annual event attraction plan.
- Appoint a business tourism and events manager to work with stakeholders to identify and bid for key events, leverage the relationship with Business Events Sydney and guide cross regional partnerships.
- Undertake an immediate events infrastructure audit to better align the destination with potential target events.

4.3.2 Priority Project 3

Create And Promote Iconic Trails

In order to build the links between the region and create greater connectivity of people and places, the development of Five Iconic Trails which showcase the region's open and natural spaces is identified as a priority. These trails build on experiences that are already on offer as well as creating new experiences.

- **The 5 Lands Coastal Walkway**
Showcasing key natural and cultural assets of the Central Coast, the 5 Lands Walk is a key iconic trail that can be further promoted and developed into a year round visitor experience.
- **Iconic Hinterland and Coastal Drives**
Two beautiful, scenic drives that promote the diverse natural settings of the Central Coast region. These drive routes should be supported through the development of a series of lookouts, short walks and interpretation. The Hinterland Tourist Drive loops through the hinterland by way of Peats Ridge Road. The Coastal Tourist Drive creates a new drive experience following the old Pacific Highway route from Mooney Mooney through to Kariong.
- **Iconic Water Trails**
Two on-water based iconic trails which showcase the stunning coastal environment and offer diversified water based experiences. A kayak/canoe trail and a motorised boat trail will provide key nature-based experiences which offer a different perspective for visitors.

Immediate Actions

- Central Coast Tourism to develop suggested Iconic Drive and Trail itineraries including existing and proposed new routes for stakeholders to leverage funding and support.
- Councils to share progress on infrastructure investment in recreational assets with CCT who will co-ordinate with a University partner to do an annual review of the tourism opportunities that could flow from Council's investment in recreation infrastructure (especially trails).

4.3.3 Priority Project 4

Integrated Social Media Strategy

The way in which consumers are interacting with technology is constantly developing and provides key opportunities to improve the travel experience and promote the destination.

Building on the Regional Events Alliance, a **targeted social media campaign** is imperative for driving growth of the active travellers market. The active segment is characterised by short breaks and short decision making periods. Social media enables a direct reach to the 'tribes' and influencers of travel, as opposed to mainstream media, and presents an improved mechanism to capture the decision making period.

Appendix 4 (page 42) details the awareness and perception of the Central Coast from social media channels including Google, Facebook and Twitter. While there is marginal awareness of the region, there is potential for the Central Coast to increase its presence on social media channels and improve its competitive advantage in the region.

Immediate Actions

- **Develop and implement a tourism Digital Marketing strategy with a dedicated social media staff member at CCT.**
- **Build a social media following for the Central Coast and target social media 'influencers' in key groups for short breaks.**

4.3.4 Priority Project 5

Online Booking System Review

Growing the true traveller market segment will require promotion of soft adventure experiences the region has on offer. The ability of these experiences to be booked in conjunction with accommodation via packaging is a key priority. A multi purpose online booking system with a flexible, user-friendly interface to engage local businesses, products and consumers should be investigated.

The current Visitor Information Centre booking system has limitations and needs to be reviewed to deliver ease of bookings, detailed information with flexible capabilities to increase content for add-on products, experiences and campaigns.

Immediate Actions

- **Undertake a review of the suitability of the current booking system to the future needs of the destination.**
- **Work with existing products and experiences to link and sell online through mentoring.**

4.3.5 Priority Project 6

Actively Encourage Product Development and Enhancement

To become a destination of choice for investment and new product development the Central Coast needs to lead by example. Through proactively working with operators to embrace experience development and invest in new & existing products and experiences. Investors need confidence that their investment will generate a return and many will seek incentives in the form of the removal of headworks charges or other incentives.

Competitor destinations offer these incentives including Brisbane City Council who has demonstrated its commitment to addressing the existing undersupply of hotels in Brisbane, announcing a moratorium on infrastructure charges for all 4 and 5 star hotel development applications approved by 30 June 2014. From this a number of new hotels have been announced including a luxury redevelopment of a previous government office block to accommodate the new 'Olsen Hotel'.

Immediate Actions

- **Please Supply**

In addition to infrastructure and investment incentives the Central Coast needs to work with operators to better understand and meet the needs of their consumers through experience development mentoring.

4.4 Destination Action Plan

Legend to page at right: **CCT** (Central Coast Tourism); **CCRDC** (Central Coast Regional Development Corporation); **CHC** (Chambers of Commerce); **DPC** (Dept Premier & Cabinet) **DRET** (Dept Resources, Energy & Tourism); **GCC** (Gosford City Council); **RDACC** (Regional Development Australia Central Coast); **TETCM** (The Entrance Town Centre Management); **WSC** (Wyang Shire Council)

4.4 Destination Action Plan (cont).

	Action	Responsibility	Timing
Build a Sustainable Visitor Economy to Support Future Investment	Adopt a more coordinated approach across Councils and the RTO to attract and deliver major sporting events as well as Meetings, Incentives, Conferences, Events and the Education market by expanding the role of the Central Coast Regional Events Alliance to include an event attraction sub-committee	Lead: CCT, GCC, WSC, CCREA Support: RDACC and relevant sporting bodies	Immediate 2013/14
	Leverage events that have the potential to have a greater economic impact by engaging other parts of the economy including performing and visual arts, educational, entertainment, cultural and heritage experiences	Lead: CCT, GCC, WSC, (CCREA) Support: Performing Arts associations, University, TAFE	Immediate 2013/14
	Support Councils and private investors to create new places for visitors and locals to experience the natural assets of the region including projects identified in the Tourism Opportunity Plan	Lead: GCC, WSC, CCT, RDACC, I&I, CCRC (Visitor Economy Industry Action Group)	Mid-long Term 2014/17
	Grow the base of international visitors in partnership with nearby regions (eg: Port Stephens, Hunter, Newcastle) and the Legendary Pacific Coast Touring Route	Lead: CCT Support: Tourism Industry, DNSW	Immediate 2013/14
	Build local pride through a local awareness campaign and familiarisation program with the tourism industry	Lead: CCT Support: Tourism Industry, GCC, WSC	Immediate - Long Term 2013/17
	Support a strong, confident and united industry through regular networking, workshops and events	Lead: CCT & Board Support: Tourism Industry, CHC, DNSW, RDA, DPC	Immediate - Long Term 2013/17
	Support take-up of industry accreditation and self regulation to deliver a high quality experience for visitors without compromising the quality of life of residents or the conservation of our precious environment and amenity.	Lead: CCT Support: Tourism Industry, DNSW	Immediate - Long Term 2013/17
	Encourage local operators to develop, renew & revitalise current product and experiences to drive longer stays and repeat visitation	Lead: CCT Board Support: DRET, Tourism Industry, DNSW	Immediate - Long Term 2013/17
	Secure partnership funding to appoint a Business Tourism and Events Manager to implement Priority Project #2	Lead: CCT Support: RDACC, GCC, WSC	Immediate - Long Term 2013/17
	Councils and the Tourism Organisations to identify and promote a suite of investment incentives to encourage new product development and investment	Lead: CCT, GCC, WSC Support: RDACC	Immediate 2013/14
Connect People and Places	Develop a high quality investment prospectus outlining new product development opportunities that align with identified market needs	Lead: CCT, GCC, WSC Support: RDACC	Medium Term 2014/17
	Build the links throughout the region by the development of improved infrastructure connecting villages, products and experiences supported with better public/private transport options.	Lead: GCC, WSC, RDACC, CCT Support: Dpt Transport, Tourism Industry	Immediate - Long Term 2013/17
	Take a more flexible approach to placemaking utilising the NBN and 'pop up' style infrastructure	Lead: GCC, WSC	Immediate 2013/14
	Take a lead in active engagement in social media and other integrated marketing initiatives to reach 'tribes' and influencers of travel to grow niche visitation.	Lead: CCT Support: GCC, WSC	Immediate 2013/14
	Support the ongoing development of the 5 Lands Coastal Walkway to deliver a year round visitor experience	Lead: GCC, 5LW Inc, CCT Support: DNSW	Mid - Long Term 2014/17
	Create new scenic iconic Hinterland and Coastal Drives with spectacular lookouts, interpretive signage and new nature walks	Lead: GCC, WSC, CCT	Mid - Long Term 2014/17
	Develop new iconic water trails to show visitors new places and showcase the open and natural spaces. eg: canoe/kayaking, motorised boat trails etc.	Lead: GCC, WSC, CCT	Mid - Long Term 2014/17
	Leverage Council's investment in WiFi and innovative technologies to create immediate response campaigns for visitors	Lead: GCC, WSC, CCT, RDACC	Mid - Long Term 2014/17
	Develop and launch a new online booking platform that brings accommodation, experiences and events together and work effectively pre-trip and enroute with greater flexibility to respond to consumers wants, needs and desires	Lead: CCT	Immediate 2013/14



4.4 Destination Action Plan (cont)

Legend: **CCT** (Central Coast Tourism); **CCRDC** (Central Coast Regional Development Corporation); **CHC** (Chambers of Commerce); **DPC** (Dept Premier & Cabinet) **DRET** (Dept Resources, Energy & Tourism); **GCC** (Gosford City Council); **RDACC** (Regional Development Australia Central Coast); **TETCM** (The Entrance Town Centre Management); **WSC** (Wyong Shire Council)

Action	Responsibility	Timing
Target more Active Travellers	Target niche markets who travel mid-week through a social media strategy and other integrated marketing activities.	Lead: CCT Support: Tourism Industry Immediate - mid term 2013/16
	Utilise the success of the Mariners to promote the destination for sports tourism to capitalise on our extensive sports infrastructure.	Lead: GCC, WSC, CCT (CCREA) Support: Sporting Bodies Immediate - mid term 2013/16
	Create awareness of the suitability of the region for niche travel markets including Disability/Accessible, Indigenous, Nature-Based and Surf Tourism	Lead: CCT Support: Tourism Industry Mid term 2014/16
	Leverage Great Golf Courses of Australia initiative of Tourism Australia to attract a national golf event	Lead: CCT Support: Tourism Industry, Tourism Australia, DNSW Immediate - mid term 2013/16
	Create a strong events calendar that drives off-peak and mid-week visitation	Lead: GCC, WSC, CCT (CCREA) Immediate - 2013/2014
	Target active recreation visitors and experience seekers from the drive market including fishing, boating, mountain biking, walking, surfing, watersports, diving, golfing etc	Lead: CCT Support: Tourism Industry, Sporting Bodies Immediate - long term 2013/17
	Undertake a product audit matching the needs of current and emerging target niche markets and the products available in the Central Coast to identified opportunities	Lead: CCT Support: Industry Immediate 2013/14
Activate the Destination and Natural Assets	Push the soft-adventure experiences of the destination along with accommodation options	Lead: CCT Support: Tourism Industry Immediate - 2013/14
	Develop an investment prospectus for ecotourism opportunities including accommodation and attractions	Lead: GCC, WSC Support: CCT, I&I, RDACC Mid - long term 2014/17
	Showcase all weather experiences to promote the destination as a year round option	Lead: CCT Support: Tourism Industry Immediate - 2013/2014
	Grow the true traveller segment both domestic and international through new natural adventure experiences	Lead: CCT Support: Tourism Industry Immediate - 2013/2014
	Further develop amenities for mountain biking such as a mountain bike park working with State level partners including Forestry and National Parks	Lead: GCC, WSC, Forest NSW, NPWS Long term 2015/17
	Encourage the development of soft-adventure experiences in nature through identification of emerging market needs and suitable land in both planning schemes to earmark the potential in the region	Lead: CCT Support: Tourism Industry Medium term 2015/17
	Undertake an Experience Development Mentoring program with operators to encourage new and existing product development ideas	Lead: CCT Support: RDACC Medium term 2015/17

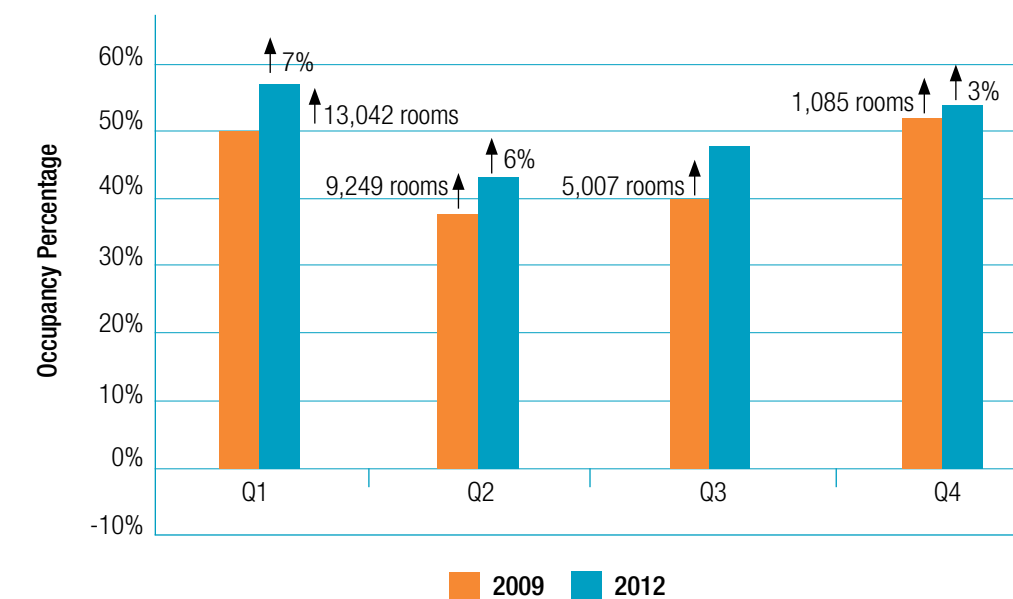
Appendix

Appendix 1: 2009/2012 Occupancy Comparison

Overall occupancy has increased significantly across all seasons, with an average increase of 5.75% from 2009 – 2012. The year 2012 saw an added 28,383 rooms occupied (total).

Occupancy rates differ significantly according to season. The summer seasons experience much higher occupancy rates, with a peak of 57% occupancy in Q1, compared with a low of 43% occupancy in Q2 (14% decrease).

Whilst this poses a significant seasonal gap, the difference between seasons appears to be marginally decreasing. In 2009, there was a 12.5% difference in average occupancy between summer and winter months. In 2012, this decreased to an 11% difference in occupancy between summer and winter.



Appendix 2: Visitor Types

The three most prominent visitor types have remained consistent since 2009. In 2012, Compatriots, Wanderers and Pampadours collectively made up 72% of the total market. As such the region must place an emphasis on attracting more active travellers, such as Peer Group Travellers and True Travellers.

These traveller types respond to physical activity, adventure, risk, party time, clubs and pubs, fishing or hunting trips by males, girls' weekends, school reunions etc.

Whilst True Travellers have increased from 6% in 2009 to 11% in 2012, Peer Group Travellers have remained consistent at 13%.

Visitor Type	2009	2012
Compatriots	29%	33%
Wanderers	26%	20%
Pampadours	20%	19%
Peer Group Travellers	13%	13%
True Travellers	6%	11%
Other	6%	4%

Source: Destination NSW Regional Snapshots for Year Ending December 2012 and 2009

Appendix 3: Sydney Market Share Trends

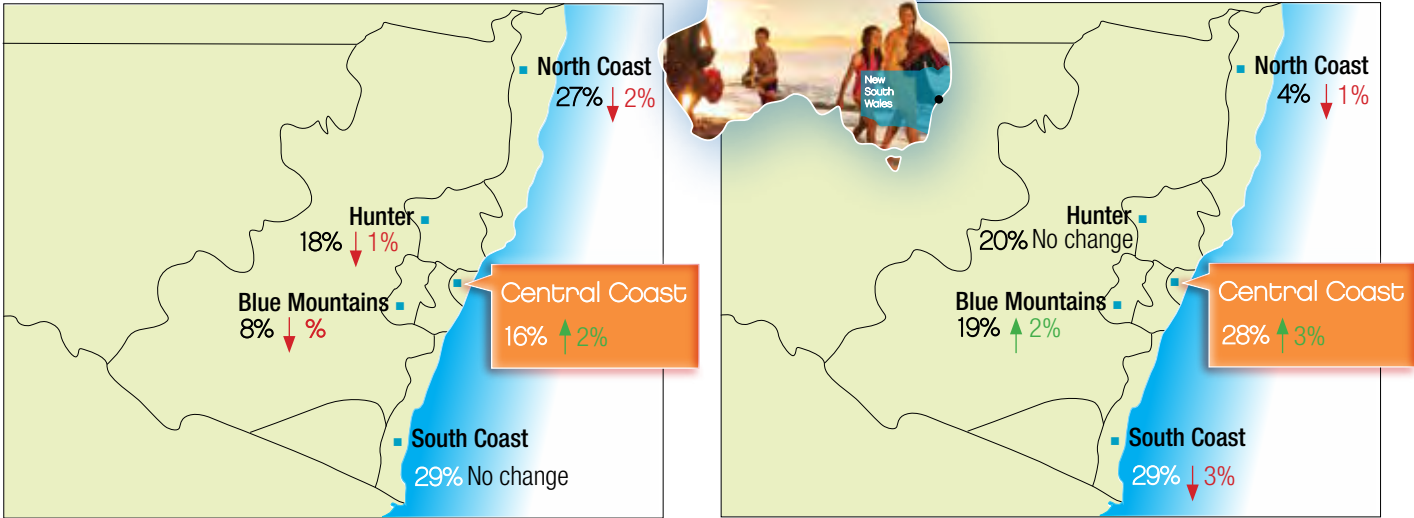
The current market share (YE Dec 2012) of visitors originating from Sydney is depicted below. Central Coast is compared against its competitors and an indication of whether the share for each destination has increased (↑) or decreased (↓) over the last five years (since YE Dec 2008) is presented.

The Central Coast is one of the only regions in coastal NSW that has experienced a growth in the market share of overnight visitors from Sydney (increased by 2%).

Market share of daytrip visitors from Sydney has also increased by 3%, making the Central Coast one of only 2 regions that have experienced an increase.

Daytrip Sydney Visitors Market Share

Overnight Sydney Visitors Market Share



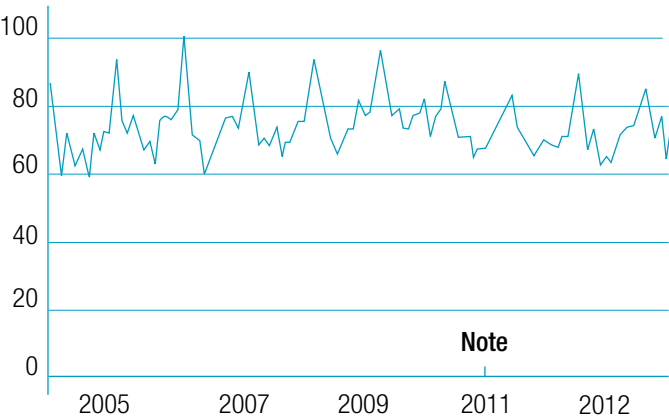
Source: Data obtained from Tourism Research Australia IVS & NVS (2012)

Appendix 4: Awareness and Perceptions

Google Trends

The graph below shows a snap shot of how often the search-term Central Coast is entered into the Google search engine. The vertical axis shows how frequently the term is searched for relative to the number of searches, with 100 representing the peak Google search. This graph shows that users have a moderate awareness about the Central Coast. The items that register a peak in Google searches for the Central Coast relates to sport and local crime.

Google Trends using search term Central Coast



Source: Google Trends, <https://twitter.com/OurCentralCoast>, <https://twitter.com/SthCoastTourism>, <https://www.facebook.com/SouthCoastNSW>, <https://www.facebook.com/CentralCoastTourism?fref=ts>

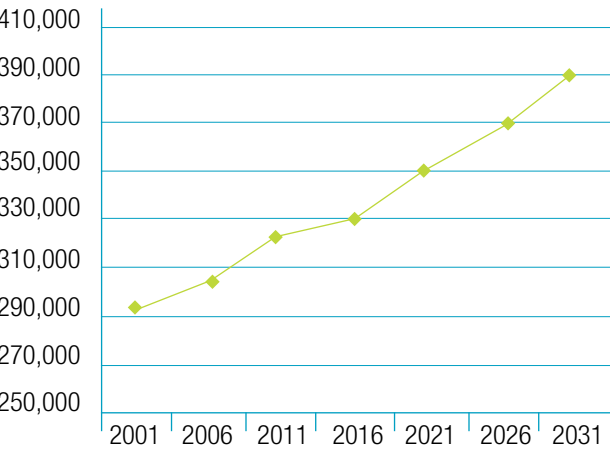
Social Media

After analysing both the Central Coast Tourism and South Coast Tourism Facebook sites, it shows that Central Coast Tourism's page has a more active social media presence. The Central Coast page has over 2,500 Facebook fans and uploads posts regularly with features on community events, tourism operators and destination images.

South Coast Tourism is less active and has only 212 Facebook Fans. These findings are the same for Twitter. The Central Coast is very active with 2,444 followers, compared to South Coast's with 697 twitter followers. Although, The graph opposite shows marginal increases in awareness about the Central Coast, there is significant opportunity to increase awareness and perception about the destination via its social media channels and create a competitive advantage within the region.

Appendix 5: Population and Employment Forecasts

Population Growth of Central Coast 2001 - 2031



Forecasts for the Central Coast

Figure 3 shows that the region is trending towards reaching it's projected population of 385,560. This means the number of people living within the Central Coast will increase by nearly 60,000 people in less than 20 years. As such, it has the potential to stretch the region's current infrastructure capabilities, particularly housing and transport, and employment opportunities. This could result in negative socio-economic impacts that have the potential to reduce positive perceptions about the destination from the wider community and tourists visiting the area. With that said, employment in the tourism industry across New South Wales is growing. If the population continues to grow above the stretch target along the Central Coast, then the region will have the capabilities to meet employment demand.

Key Economic Industries

There has been a significant shift since 2010 to focus on a larger number of key economic industries in the region.

Source: profile.id and forecast.id for Gosford City & Wyong Shire (2012)

Employment Growing at Target

- **2010**
Tourism employed 150,000 people in New South Wales directly, representing 4.7% of all persons employed in the state.
- **2013**
Tourism now employs 159,000 people in New South Wales directly, representing 4.5% of all persons employed in the state.

Source: NSW Government Department of Trade and Investment (2013)

2010
Retail
Manufacturing
Property and business services
Health and community services

2013
Warehousing and logistitcs
Food processing
Manufacturing
Building and building products
Health and community services
Information & communications technology
Tourism

Appendix 6: TOP Proposed Investment Projects

Accommodation Sector

Project	Location	Details/Comments
Tourism Hub	The Entrance	<ul style="list-style-type: none">■ Top quality hotel and conference centre■ Accompanying water theme park
Accommodation on edge of National Parks	Central Coast Region	<ul style="list-style-type: none">■ Guest houses/other accommodation types to cater for overnight trekking experiences
Holiday Park Demand Study	Entire Region	<ul style="list-style-type: none">■ For mixed use caravan park style accommodation (drive & budget target market)
Warnervale business hotel & conference facilities	Warnervale	<ul style="list-style-type: none">■ Motel and conference centre within the Warnervale Town Centre

Human Resource

Project	Location	Details/Comments
Up-skilling Project	Throughout the Region	<ul style="list-style-type: none">■ Need to up-skill many tourism sector players■ Higher service standards required if the region is to remain competitive
Employment and skills audit	Throughout the Region	<ul style="list-style-type: none">■ Shortage of skilled staff is noted■ Identify skills gaps■ Look at multi-skilling opportunities

Attractions, Activities and Sports		
Project	Location	Details/Comments
Pioneer Diary Sporting Hub	Wyong	<ul style="list-style-type: none">To grow sports & sport tourismFeature wide range of facilities and different sports typesCollaboration with local/regional sporting clubs
Creation of a Motorsport Precinct	Central Coast Region	<ul style="list-style-type: none">Potentially cater for car racing, go karting track, learn to drive and advance driving courses, BMX and motor cross track
The Waterfront Development at Gosford - Stage 1	Gosford	<ul style="list-style-type: none">Host of economic, social and community benefitsDevelopment of a combined hotel and Performing Arts and Conference Centre, 3 buildings for commercial use and 3 residential buildings
Mount Penang Tourism Precinct	Gosford	<ul style="list-style-type: none">Potential to develop a lifestyle, sporting and events precinctMay involve indoor attraction (e.g. haunted interactive scare house), major event area, moonlight cinema experience, leisure style hotel, a major shopping complex and microbrewery
Floating Water Play Park	Terrigal or The Entrance	<ul style="list-style-type: none">Investigation into water quality and safety when ascertaining the most appropriate location
Darkinjung Cultural Centre	Central Coast	<ul style="list-style-type: none">Unique cultural attraction focusing on cultural history of the area and the Darkinjung People
Improve access for activities on the water	Entire region	<ul style="list-style-type: none">Improved access infrastructure for kayak, hire, jetties, etc at these activity hotspots
Development of a wharf and marina at Terrigal Haven	Terrigal	<ul style="list-style-type: none">Dive training and education schoolLeverage off unique artificial dive reef created by the sinking of the Ex-HMAS Adelaide off Avoca Beach
Aboriginal culture sites linked to the 5 Lands Walk	Terrigal	<ul style="list-style-type: none">Existing annual community-based, cultural, physical and spiritual event.Opportunity exists to further integrate Indigenous sites of significance into the program
Lookouts for whale watching and photo opportunities	Ettalong Bay, Woy Woy and Davistown	<ul style="list-style-type: none">Opportunity exists to further integrate Indigenous sites of significance into the program allowing participants to enjoy a wide variety of activities and experiences
Golf Experience	Magenta Shores, Kooindah Waters	<ul style="list-style-type: none">Series of world class courses
Ngaruki Gulgul - Aboriginal training facility and arts space	Mt Penang and Gosford	<ul style="list-style-type: none">Undertake feasibility studyCentre could be utilised to interpret both Indigenous and non-Indigenous regional culture and heritage
Iconic Walks - Family Adventure Precinct on edge of National Park Land and along Coast	Throughout the region	<ul style="list-style-type: none">Sustainable high quality walk experiences through circuit and summit walks near iconic sites (may involve upgrade of existing walks)
Surfing Tourism Attraction	Terrigal and Gosford	<ul style="list-style-type: none">Create leading surf tourism hotspotConduct feasibility study for world-class surfing stadium with a man-made perfect wave
A Bluetongue Brewery Outlet / Café / Restaurant	Warnervale	<ul style="list-style-type: none">Sustainable high quality retail, food & beverage experience leverage from emerging local Bluetongue beer brand

Attractions, Activities and Sports		
Project	Location	Details/Comments
A food and wine trail	Throughout the region	<ul style="list-style-type: none">Leveraging off the high quality food and wine industry throughout the HinterlandDevelop appropriate zoning
Brisbane Water Adventure Cluster	Brisbane Water	<ul style="list-style-type: none">Develop series of water based activities (cruise operations and jet boating activities with Brisbane water as unique selling point
Aquatic Centre	Warnervale	<ul style="list-style-type: none">Construction of aquatic centre within the Warnervale Town Centre
Adventure Races Precinct	Magenta Oval	<ul style="list-style-type: none">Venue to host major adventure racesSupport event tourism
Old Sydney Town Theme Park	Region	<ul style="list-style-type: none">Build on history and pioneer heritage through redeveloping the Old Sydney Town Theme Park
Shelly Beach Golf Club	Shelly Beach	<ul style="list-style-type: none">Revise Council's planning controls to provide surveillance of the street and the Golf Club
Terrigal Haven Tourism Precinct	Terrigal	<ul style="list-style-type: none">Current base for fishing and diving charters, with dive sites in the vicinity
Major obstacle course - extreme training venue at Mt Penang	Gosford	<ul style="list-style-type: none">Fixed or temporaryCould be utilised for training as well as events
Feasibility for the development of a Marine Education Centre and Oceanarium	Gosford or The Entrance	<ul style="list-style-type: none">Determine the viability of developing the Centre and Oceanarium at the Landing, linking back to stage 1 of The Landing proposal or consider possible sites at The Entrance.
China Cultural Village	Wyong	<ul style="list-style-type: none">Support development of \$500m China's Forbidden City Theme Park, featuring a full-size replica of gates to the Forbidden City and a nine-storey temple.
Waterfront River Cruise	Central Coast	<ul style="list-style-type: none">Feasibility study for viability of the project to provide an additional attraction and offer cruises to cater for functions/small events.
Encourage iconic local events	The Entrance	<ul style="list-style-type: none">Leveraging off the unique selling points of the region – similar to Staircase to the Moon Festival in WA
Central Coast Adventure Pass	Central Coast	<ul style="list-style-type: none">Enabling access to the Central Coast recreation parks, including the Tree Top Adventure Park, horse racing and The Australian Reptile Park
Network of natural trails	Throughout the region	<ul style="list-style-type: none">Creating and promoting a network of renowned natural trails

Appendix 6: TOP Proposed Investment Projects (cont)

Community and Support Infrastructure		
Project Community awareness program	Location Central Coast Region	Details/Comments <ul style="list-style-type: none">Improve understanding of tourism and its benefits and contribution to local economyProvide information via social media, website news and brochures
Aussie Host program and Business Awards program	Central Coast Region	<ul style="list-style-type: none">To build service qualityPartnership with ChamberLinks with education providers to grow education market and available courses
Central Coast Arts and Conference Centre	Wyong	<ul style="list-style-type: none">Will enable the Central Coast Conservatorium to offer a truly regional program for new audiences, with orchestra performances in the 500 seat facility and chamber performances in the studio space
Directional signage	Central Coast Region	<ul style="list-style-type: none">Improvements to exit signs on all main highways and roads; andTourism products in town
Improve access for activities on the water	Central Coast Region	<ul style="list-style-type: none">Improved access infrastructure for kayak, hire, jetties, etc at activity hotspots
4 key seasonal events	Throughout the region	<ul style="list-style-type: none">Significant visitor draw cards; ideal location for range of different sporting and lifestyle eventsMay include orienteering, cycling, downhill mountain biking, kayaking, ocean swimming etc.
Attract youth events	Throughout the region	<ul style="list-style-type: none">Could be significant draw card for younger visitor marketMusic festivals, dance festivals, Crusty DemonsSporting events (various)
Kariong Event Park	Kariong	<ul style="list-style-type: none">Power, fencing, lighting for site specific events
Prepare a Regional Signage Plan	Central Coast Region	<ul style="list-style-type: none">Highly important for guiding and dispersing visitors to popular tourism sitesPlan should be developed to ensure effective and unified signage throughout the region.

Appendix 7: Workshop Attendees

Name	Company
Mary Rayner	Australian Reptile Park
Libby Bain	Australian Reptile Park
Don Phinn	Australian Tourist TV
Brett Rowe	Avoca Palms Resort
John Millard	Backpackers at The Entrance
Kristy Cameron	Bateau Bay Square (Charter Hall)
Ralph Harris	Brushwood Lodge
Beverley Yule	Central Coast Wetlands Pioneer Dairy
Marlene Pennings	Central Coast Wetlands Pioneer Dairy
Nicolette Scott	Central Coast Tourism Inc.
Jacqui Greaves	Central Coast Tourism Inc.
Robyne Abernethy	Central Coast Tourism Inc.
Tim Costello	Central Coast Tourism Inc.
Shane Caruana	Coastal Liner Touring
Jono Armstrong	Coastal Liner Touring
Chris Hooper	Country Comfort Terrigal
Anthony Mahon	Crowne Plaza Hotel
Rochelle Romero	Department of Premier Cabinet
Tina Davies	Department of Premier Cabinet

Name	Company
Christine Hunt	Dial An Angel
Christine Hayes	Diggers @ The Entrance
Mark Olsen	EC3 Global
Grace Jefferson	ET Australia
Barton Lawler	Glenworth Valley Outdoor Adventures
Nicole Hain-Lynch	Glenworth Valley Outdoor Adventures
Paul Brasch	Gosford Business Improvement District
Fiona Morrison	Gosford City Council
Kim Radford	Gosford City Council
Rebecca Cardhy	Gosford City Council
Michael Bowman	Gosford City Council
Deborah Warwick	Imperial Shopping Centre
Tim O'Brien	Jobs on the Coast
Josh Pitt	Ken Duncan Gallery
Ekatarina Orlova	Luka Chocolates
Len Birger	Microlight Adventures
Amy Scurr	Mingara Recreation Club
Angela Lanser	Mingara Recreation Club
Joy Groves	Norah Head Lighthouse Trust

Appendix 7: Workshop Attendees (cont)

Name	Company
Jacque Spring	Norah Head Lighthouse Trust
Gary Blaschke	Northern Lakes Disability Tourism Precinct
Daniel Farmer	NSW Business Chamber
Peter Brown	NSW Trade and Investment
Kia Hawken	On Bumbles Creek
Michael Moran	On Bumbles Creek
Steve Clarke	Quality Inn the Willows
Scott Armstrong	Quay West Magenta Shores
Eliza Kibell	Quay West Magenta Shores
Andrew Roach	Regional Development Australia Central Coast
Oliver Christofi	Sandy Cove Apartments
Cassie Grentell	Star 104.5 FM
Steve Treleaven	Sun Gods Adventure Travel

Name	Company
Chris Parker	Surf Life Saving Central Coast
Lisa Standish	Terrigal Sails Apartments
Sunshine Estivo	The Entrance Backpackers
Kellie Purcell	The Entrance Town Centre Management
David Fellows	Tourism Management
Tony Drew	Wyong Race Club
Karen McLean	Wyong Regional Chamber
Sandra Kerr	Wyong Regional Chamber / F. Hannan Property
Tara Mills	Wyong Shire Council
Janine Crawford	Wyong Shire Council
Sue Ledingham	Wyong Shire Council
Bob Burch	Wyong Shire Council, Transport Planning

Appendix 8: Gosford LGA Product Audit

Product Type - Accommodation	
Apartments	Location
Absolute Beach Front Apartment	Terrigal
Avoca Palms Resort Apartments	Avoca Beach
Blue Seas Villa	Avoca Beach
Bulwarra Resort	Terrigal
North Avoca Executive Seaside Escape	North Avoca
Reflections Penthouse	Terrigal
Star of the Sea Luxury Apartments	Terrigal
Terrigal Sails Serviced Apartments	Terrigal
The Deck Killcare	Killcare
Backpackers, Hostels & Pub Stays	Location
Elanora Hotel Motel	East Gosford
Hotel Gosford	Gosford
Kincumber Hotel	Kincumber
Ocean Beach Hotel	Umina Beach
Patonga Beach Hotel	Patonga Beach
Terrigal Beach Hostel	Terrigal
Bed and Breakfasts	Location
Amilee B&B	Terrigal
Avoca Valley B&B	Avoca Beach
Bellbird Rest Bed & Breakfast	Lisarow
Binawee B&B	Green Point
Central Coast Waterfront B&B	Green Point
Forresters Beach B&B	Forresters Beach
Rileys at Avoca Beach	Avoca Beach
Terrigal Hinterland B&B	Wamberal
Terrigal Lagoon B&B	Terrigal
The Acreage B&B	Avoca Beach
Villa By the Sea	Terrigal
Wombats B&B	Point Clare
Cabins and Cottages	Location
Australia Walkabout Wildlife Park	Calga
Glenworth Valley Outdoor Adventures	Glenworth Valley
Granny's Cottage	Killcare
The Palms At Avoca	Avoca Beach
Wamberal Cottage	Wamberal

Product Type - Accommodation	
Caravan and Camping	Location
Ettalong Beach Holiday Village	Ettalong Beach
Ocean Beach Holiday Park	Umina Beach
Patonga Caravan Park & Camping Area	Patonga
Glenworth Valley Outdoor Adventures Camping	Glenworth Valley
Holiday Houses	Location
An Da Cer House	Terrigal
Avoca Acres	Avoca Beach
Avoca Beach Holiday House	Avoca Beach
Barnhill Breezes	Terrigal
Baronga House	Avoca Beach
Beachfront Bliss	Avoca Beach
Beach Front Escape	Wamberal
Beach Hut Terrigal	Wamberal
Bella Vista Luxury Waterfront Retreat	Davistown
Caroline Bay Getaway	Point Frederick
Casa Bay Vista	Terrigal
Cloud 78	North Avoca
Cockle Bay House	Kincumber South
Cocos Beach House	Copacabana
Emerald Cove	Ocean Beach
Forresters Beach House	Forresters Beach
Forty Five	Terrigal
Horizon Forresters Beach	Forresters Beach
Lazy Lagoon Beach House	MacMasters Beach
Point Break Beach House	Copacabana
Riviera Treehouse	Terrigal
Seaview at MacMasters	MacMasters Beach
Tascott Heights Gosford	Tascott
Terrigal Whitehaven	Terrigal
Tree Breeze	MacMasters Beach
Weatherly House	Killcare
Lodge	Location
Broken Bay Sport and Recreation Centre	Patonga
Great Aussie Bush Camp	Kincumber
Jacaranda Lodge	Patonga
Mangrove Yoga Ashram	Mangrove Creek

Appendix 8: GosFord LGA Product Audit (cont)

Product Type - Accommodation	
Hotel/Motel	Location
Apollo Resort	Wamberal
Ashwood Motor Inn	West Gosford
Bay View Motel	Woy Woy
Bella Vista Motel	Kariong
Bermuda Motel Inn	Wyoming
Best Western Gosford Motor Inn	West Gosford
Clan Lakeside Lodge	Terrigal
Forresters Beach Resort	Forresters Beach
Country Comfort Inn Terrigal	Terrigal
Ettalong Beach Motel	Ettalong Beach
Galaxy Motel	West Gosford
Glades Motor Inn	Woy Woy
Gosford Palms Motor Inn	Gosford
Ibis Budget	West Gosford
Quality Inn The Willows	Wyoming
Terranova Motel	Niagara Park
Terrigal Pacific Motel & Apartments	Terrigal
Tiarri Terrigal Beach	Terrigal
Treetops Resort Avoca Beach	Avoca Beach
Watersedge Motel	Woy Woy
Luxury	Location
Bells at Killcare	Killcare Heights
Somersby Gardens	Somersby
Resorts	Location
Crowne Plaza Terrigal	Terrigal
Ettalong Beach Tourist Resort	Ettalong Beach
Mantra Ettalong Beach	Ettalong Beach
The Tantra Apartments at Ettalong Beach Resort	Ettalong Beach
Self Contained	Location
Avoca Beach Heritage Villas	Avoca Beach
Copacabana Luxury Apartments	Copacabana
Family Retreat	Terrigal
Karalta Court Village	Erina
Terrigal Executive Suite	Terrigal
Product Type - Attraction	
Amusement and Theme Parks	Location
Central Coast Steam Model Co op	Narara
Glenworth Valley Outdoor Adventures	Glenworth Valley
The Paintball Place	Kulnura
Charters Diving	Location
Dive Imports Australia	Erina
Gosford Dive Services	Umina Beach
Scuba Shack Charters	Ettalong Beach
Terrigal Dive Centre	Terrigal
Charters Fishing	Location
1300 BIGFISH - Calmwater Fishing Charters	Gosford
Central Coast Reef & Game Fishing Charters	Terrigal
Hawkesbury Fishing Charters	Davistown

Product Type - Attraction	
Classes, Lessons and Workshops	Location
Central Coast Surf School	Terrigal
InRhythm	East Gosford
Rhythm Hut	Gosford
Salsa X Dance Co	Kariong
Surf Life Style	MacMasters Beach
Cruises	Location
Cockatoo Ferry	Davistown
Fantasea Cruises	Ettalong Beach
The Last Riverboat Postman	Brooklyn
Starship Cruises (Lady Kendall)	Point Frederick
Galleries, Museums and Collections	Location
Bamboo Buddha	Holgate
Galeria De Arte	Umina Beach
Gosford Regional Gallery	East Gosford
Ken Duncan Gallery	Erina Heights
Moochinside Gallery	Killcare
Neale Joseph Fine Art Gallery	Terrigal
R.A Stanley Landscape Photography	East Gosford
Sergio Sill Fine Arts Gallery	Kariong
Somersby Photographic Gallery	Somersby
Studio Latitude 33	Avoca Beach
The Bouddi Gallery	Killcare
Entertainment	Location
Avoca Beach Bowling & Recreation Club	Avoca Beach
Avoca Beach Picture Theatre	Avoca Beach
Breakers Country Club	Wamberal
Central Coast Leagues Club	Gosford
Cinema Paradiso	Ettalong Beach
Club Umina	Umina Beach
Davistown RSL Club	Davistown
Erina Rugby League Football Club	Erina
Ettalong Beach Memorial Club	Ettalong Beach
Ettalong Memorial Bowling Club	Ettalong Beach
Everglades Country Club	Woy Woy
Gosford Golf Club	Gosford
Gosford Racing	West Gosford
Gosford RSL Club	West Gosford
Gosford Sailing Club	Gosford
Hardy's Bay RSL & Citizens Club	Hardy's Bay
Hoyts Erina	Erina
Intencity Erina	Erina
Laycock Street Theatre (GCC)	North Gosford
Lizotte's Restaurant	Kincumber
Mangrove Mountain Memorial & Golf Club	Central Mangrove
Mooney Mooney Club on the Hawkesbury	Mooney Mooney
Reviver	Gosford
Terrigal Bowling Club	Terrigal
The Sporties At Woy Woy	Woy Woy
Woy Woy & District RLF Club	Woy Woy
Woy Woy Little Theatre	Woy Woy
Farming, Food & Produce	Location
Gnostic Organics	Woy Woy
Margins Mushrooms	Woy Woy
The Wildflower Place	Erina

Appendix 8: GosFord LGA Product Audit (cont)

Product Type - Attraction	
Natural Attraction	Location
5 Lands Coastal Pathway	MacMasters Beach
Avoca Beach	Avoca Beach
Captain Cook Lookout	Copacabana
Copacabana Beach	Copacabana
Ettalong Beach	Ettalong Beach
Forresters Beach	Forresters Beach
Katandra Reserve	Holgate
Maitland Bay Beach	Bouddi National Park
MacMasters Beach	MacMasters Beach
Mount Kincumba Regional Reserve	Kincumber
Mt Elliot Lookout	Holgate
Mt Ettalong Lookout	Umina
North Avoca Beach	North Avoca
Ocean Beach	Umina
Patonga Beach	Patonga Beach
Pearl Beach	Pearl Beach
Presidents Hill Lookout	Gosford
Putty Beach	Bouddi National Park
Rumbalara Reserve	Gosford
Terrigal Beach	Terrigal
Staples Lookout	Kariong
Strickland State Forest	Somersby
Tallow Beach	Bouddi National Park
Terrigal Beach	Terrigal
Umina Beach	Umina
Wamberal Beach	Wamberal
Warrah Lookout	Patonga
Historical Sites and Heritage Locations	Location
Henry Kendall Cottage	West Gosford
UNESCO World Heritage Listed Devines Hill and Finchs Line	Dharug National Park
Parks and Gardens including Botanic	Location
Gosford/Edogawa Commemorative Gardens	East Gosford
Mt Penang Gardens	Kariong
National Parks and Reserves	Location
Bouddi National Park	Killcare
Brisbane Waters National Park	Kariong
Dharug National Park	Gunderman
Popran National Park	Mangrove Mountain
Retail	Location
Allthings Handcraft Market	Terrigal
Deepwater Plaza Shopping Centre	Woy Woy
Erina Fair	Erina
Imperial Shopping Centre	Gosford
Killcare Village Shops	Killcare
Rusty Cow Australiana	Gosford
Sanaa Afrika	Terrigal
Southern Adventures	West Gosford
The Mousehole	Avoca Beach
Spas and Retreats	Location
Bells Day Spa	Killcare
Jhalu Day Spa and Fitness	Ettalong Beach
Tea Tree	Terrigal

Product Type - Attraction	
Sports and Recreation	Location
Bluetongue Central Coast Stadium	Gosford
Breakers Country Club	Terrigal
Central Coast Surf School	Umina Beach
Erina Ice World	Erina
Everglades Country Club	Woy Woy
Ex-HMAS Adelaide Dive Site	Terrigal
First Strike Laser Skirmish	Peats Ridge
Gosford City Basketball and Sports Stadium	Terrigal
Gosford Golf Club	Gosford
Gosford Tenpin Bowling	Wyoming
Impact Centre	Erina
Mangrove Mountain Memorial & Golf Club	Mangrove Mountain
Microlight Adventures	Somersby
Segway Central Coast	Kariong
The Springs Golf Club & Function Centre	Peats Ridge
Transport	Location
Busways	Kincumber
Central Coast Ferries	Saratoga
Wineries, Vineyards and Breweries	Location
Distillery Botanica	Erina
Firescreek Wines	Holgate
Six Strings Brewing Company	Erina
Zoos, Sanctuaries, Aquariums and Wildlife Parks	Location
Central Coast Marine Discovery Centre	Terrigal
Australia Walkabout Wildlife Park	Calga
Australian Reptile Park	Somersby
Product Type - Dining/Eating Out	
Cafes	Location
Aromas @ The Hive	Erina
Aromas on the Sea (Crowne Plaza)	Terrigal
Avoca Beach Pizza & Pasta Café	Avoca Beach
Avoca Sands Café	Avoca Beach
Bamboo Buddha	Holgate
Bonne Journee	East Gosford
Café Camino (old Avoca Teahouse)	Avoca
Café Espresso	East Gosford
Café Jam	East Gosford
Café Paradiso	Ettalong
Caroline Bay Brassiere & Café	East Gosford
Coast 175 Café	Ettalong Beach
Coastal Treats	Umina
Corrugated Café	Peats Ridge
Delish of Erina	Erina
Ferry Road Café	Ettalong Beach
Gnostic Mana	Woy Woy
Green Room Espresso	Terrigal
Harrisons on Church	Terrigal
Hatters Tea House	Ettalong Beach
Haven Beach Café	Terrigal
La Palma Pizza	Ettalong
Lanxaneta (The Old Killcare Store)	Killcare

Appendix 8: GosFord LGA Product Audit (cont)

Product Type - Dining/Eating Out	
Cafes cont.	Location
Mum's Seafood Kitchen	Umina
Oomph Café	East Gosford
Ruby 2 Café & Books	Ettalong Beach
Sage Café	Erina
San Churro	Erina
Silver Tree Café	Erina
Sit n Chat Gourmet Café	Woy Woy
Sit 'n' Chats	Erina
Sit O'Clock	Woy Woy
Taste Gourmet Grocer & Café	East Gosford
The Café @ Impact Plants	Empire Bay
The Coffee Club	Erina
The European Café	East Gosford
The Fat Goose	Killcare
The Foot Note	Copacabana
The Point Café (Avoca)	Avoca Beach
The Point Café (Killcare)	Killcare
The Point Café (Wamberal)	Wamberal
Treble Clef Café (formerly Sassy's)	Umina
Pubs/Bars	Location
Avoca Beach Hotel	Avoca Beach
Bay View Hotel & Brasserie	Woy Woy
Duttons Tavern	Gosford
Elanora Hotel	East Gosford
Empire Bay Tavern	Empire Bay
Ettalong Hotel	Ettalong Beach
Florida Beach Bar (Crowne Plaza)	Terrigal
Henry Kendall Tavern	West Gosford
Hotel Gosford	Gosford
Kariong Family Tavern	Kariong
Kincumber Hotel	Kincumber
Ocean Beach Hotel	Umina
Patonga Beach Hotel	Patonga
ReviveR Bar	Gosford
Terrigal Hotel	Terrigal
The Florida Beach Bar	Terrigal
The Grange Hotel	Wyoming
The Settlers Tavern	Gosford
Restaurants	Location
92 Thai Restaurant	Gosford
304 on West	Umina
1926 Brasserie	Gosford
5000 Miles Away from India Restaurant	Gosford
Aarons at the Rocks	Ettalong Beach
Acqua Vista	Umina
Allmalay	Avoca Beach
Audrey's Restaurant	MacMasters Beach
Avoca Bowling Club (Flavours Bistro)	Avoca Beach
Avoca Thai	Avoca Beach
BBQ Buffet Restaurant	Woy Woy
Beef & Barramundi Bar & Grill	Ettalong
Bells at Killcare	Killcare
Bentley's	Forresters Beach
Black Sesame Chinese Restaurant	East Gosford
Brando's Fountain Plaza	Erina

Product Type - Dining/Eating Out	
Restaurants cont.	Location
Breezes (Country Comfort)	Terrigal
Carao Cruz Restaurant	Terrigal
Cat's Pyjamas Restaurant	Ettalong
Chopstix	Avoca
Copper Pot Indian Restaurant	Umina
Crust Gourmet Pizza	East Gosford
Dragon Paradise Chinese Restaurant	Kincumber South
Dragon's Door Chinese Restaurant	Erina
Erina Thai & Chinese Cuisine	East Gosford
Flair Restaurant/Café	Erina Heights
Flame Tree Vietnamese	Umina
Flaming Bowl Noodle Restaurant	Erina
Gee Kwong Chinese Restaurant	Gosford
Ghandi Indian Restaurant	Ettalong
Gosford Shoreline Restaurant	Gosford
Gourmet Pizza Kitchen	Erina
Green Jade Chinese Restaurant	Kincumber
Harmony Court Restaurant	Niagara Park
Harry Rainbow Chinese,	
Ettalong Bowling Club	Ettalong
Hong Kong Chinese, Ettalong Markets	Ettalong Beach
Hungry Wolf's Italian Pizza & Pasta	Wyoming
Il Ristoro	Empire Bay
J & D Restaurants Pty Ltd	Erina
Japanese Teppanayaki BBQ Restaurant	West Gosford
Joe's Pizza Parlour	Gosford
K B Thai OK	Woy Woy
Kantara House	Green Point
Kariong Chinese Restaurant	Kariong
Khonkaen Koon Thai	Umina
Kincumber Thai	Kincumber
Kincumber Lantern	Kincumber
La Fiamma Woodfire Pizza	Ettalong Beach
Lamiche	Wamberal
Le Chat Noir	Terrigal
Letterbox Restaurant	Terrigal
L'isle de France Sur Mer Terrigal	Terrigal
Lizotte's Restaurant	Kincumber
Lucky Dragon Chinese Restaurant	Green Point
Mai Thai	Saratoga
Made Brus Mexican Restaurant	Woy Woy
Manfredi at Bells	Killcare
Menhir Spanish Tapas & Bar	Ettalong Beach
Michael's of Gosford	East Gosford
Mojito Joes	Avoca Beach
Namans Kitchen	Ettalong
N'Thai Sing Restaurant	Terrigal
Oasis Café Restaurant Lounge	Erina
Olive on Oceanview	Ettalong
Pearls on the Beach	Pearl Beach
Peking Garden	Gosford
Pelicans Restaurant (Woy Woy Hotel)	Woy Woy
Phunk Restaurant - Thai	East Gosford
Rajdhani Indian Restaurant	Avoca Beach
Rajdhani Indian Restaurant	Kincumber
Rajdhani Indian Restaurant	Terrigal
Rajdhani Indian Restaurant	West Gosford

Appendix 8: GosFord LGA Product Audit (cont)

Product Type - Dining/Eating Out	
Restaurants cont.	Location
Rajshahi Indian Restaurant	Wyoming
Randalls on the Beach	Killcare
Reef Restaurant and Grill	Terrigal
Rojo Rocket	Avoca Beach
Rossini's Italian	Lisarow
Ryley's Brasserie	Ettalong
Sapa Modern Vietnamese	Terrigal
Safran	Ettalong Beach
Santorini Café Restaurant	Terrigal
Saran Thai	Wyoming
Sea Grill Restaurant	Copacabana
Sea Spice Thai Restaurant	Umina
Seasalt (Crowne Plaza)	Terrigal
Silver Chair Restaurant	East Gosford
Silver Dragon Chinese Restaurant	Umina
Sirin Thai	Ettalong
Star Buffet	Gosford
Stillwaters Restaurant	Davistown
Supermex Mexican Restaurant	Terrigal
Table 2256	Woy Woy
Terrigal Thai Restaurant	Terrigal
Thai Phunk	Lisarow
Thai Thyme	Erina
The Austrian Schnitzelhaus	Erina
The Boathouse Waterfront Restaurant	Koolewong
The Bungalow Lounge & Tapas	Ettalong
The Cowrie	Terrigal
The Italian Restaurant	Erina
The Kings of Punjab	Erina
The Scarlett Table	Ettalong Beach
Trackside Restaurant	West Gosford
Treetops Restaurant	Avoca
Trevisani Restaurant & Bar	Gosford
Umina Asian Noodle	Umina
Umina Chinese Restaurant	Umina
Upper Deck	Gosford
Villa Sorgenti	Green Point
White Sands Restaurant	Copacabana
Willows Restaurant	Gosford North
Woy Woy Fishermen's Wharf	Woy Woy
Wyoming Lantern	Wyoming
Yum Yum Eatery	Hardys Bay
Yume Japanese Teppanyaki Restaurant	Gosford
Zitas Restaurant	Woy Woy
Take Away/Fast Food	Location
Boon's Thai	Green Point
Bremen Patisserie	Umina
Burg R Bug R Café	East Gosford
Burger Girls	Avoca Beach
Cove Café and Grill	Terrigal
Darrons Seafood	Wamberal
Ettalong Chinese Takeaway	Ettalong
Ettalong Pizza & Pasta House	Ettalong
Fishermans Wharf Woy Woy	Woy Woy
Kahveh Café	Avoca Beach
Mermaids Seafood	Avoca Beach

Product Type - Dining/Eating Out	
Take Away/Fast Food	Location
Montis Ashore	Gosford
Ocean Breeze Café (Ocean Beach Holiday Pk)	Umina
Pizza Inn	Gosford
Pizza Inn	Terrigal
Spice Noodle Bar	Terrigal
The Godfather	Wamberal
The Fish Hut	Blackwall
The Kiosk Avoca Beach	Avoca Beach
The Old Oak Peats Ridge	Peats Ridge
The Pizza Joint	Umina
The Supreme Pizza	Kariong
Umina Bakehouse	Umina
Product Type - Infrastructure	
Parking (Public)	Location
Baker St Carpark	Gosford
Gosford Town Centre	Gosford
Showground Rd Parking Deck	Gosford
Wilson Rd Parking Deck	Terrigal
Woy Woy Commuter Carpark	Woy Woy
Accredited Information Centres	Location
Avoca Beach Picture Theatre	Avoca Beach
Breakers Country Club	Wamberal
Central Coast Visitors Centre	Kariong
Gosford Visitor Information Centre	Gosford
Education/Training/Facilities/Academies	Location
TAFE NSW	Gosford
Product Type - Hire	
Boats	Location
Andersons Boat Shed	Booker Bay
AquaFun Kayak & Pedalboat Hire	Avoca Beach
Broken Bay Blue Water Charters	Booker Bay
Central Coast Boat Hire	Killcare
Central Coast Charters P/L	Ettalong
Campervans and Motorhomes	Location
Aus Venture Motor Homes	Gosford
Lookout Camper Trailer Hire	West Gosford
Motorbikes	Location
Oz Trikes (Aust) Pty Ltd	Somersby
Cars	Location
James Parker Cars	Point Clare
Minibuses and Coaches	Location
Adairs	Kariong
Southern Cross Coaches	West Gosford

Appendix 8: Gosford LGA Product Audit (cont)

Product Type - Tours	
Kayaking	Location
Ocean Planet Kayak Tours	Glenworth Valley
Scenic Flight	Location
Coastal Helicopters Aust. MyHeli	Erina Somersby
Wine Tasting	Location
Divine Tours P/L	Terrigal
Extended	Location
Australian Leisure Tours	Gosford
Full Day	Location
1300 Big Fish Broken Bay Blue Waters Charters Coast Helicopters diVine tours Horse Riding Tours - Glenworth Valley Outdoor Adventures Ocean Planet Kayak Tours OZ Trikes Tours	Gosford Booker Bay Erina Terrigal Glenworth Valley Glenworth Valley Somersby
Half Day or Less	Location
Central Coast Ferries Glenworth Valley Abseiling Glenworth Valley Quad Biking Microlight Adventures Nyanga Walang Aboriginal Tours Pro-Dive Central Coast Segway Central Coast Surf Life Style The Last Riverboat Postman	Woy Woy Glenworth Valley Glenworth Valley Terrigal Kariong Kilarney Vale Kariong MacMasters Beach Brooklyn
Tailored	Location
Scuba Shack Charters	Ettalong Beach
Product Type - Events	
Exhibitions and Shows	Location
5 Lands Walk Banff Mountain Film Festival Bike Week Blues Across the Bay Brisbane Water Oyster Festival Central Coast Beer & Cider Festival Food and Wine Fare Gosford Art Prize Gosford Regional Show National Square Dance Convention Rotary Club Kincumber Community Foreshore Walk Sculpture by the Bay	MacMasters Beach Avoca Beach Gosford Patonga Ettalong Beach Kincumber Pearl Beach Gosford Gosford Niagara Park Kincumber Gosford
Festivals and Celebrations	Location
2GO Newcastle Permanent Carols ANZAC Day Commemorations Australia Day - Woy Woy Australia Day - Gosford	Gosford Central Coast Woy Woy Gosford

Product Type - Events cont.	
Festivals and Celebrations cont.	Location
Australia Day - Wagstaffe Central Coast Italian Festival Central Coast Kids Day Out Community Spirit Festival Crossroads Festival Ettalong Beach Festival Gosford City Christmas Parade Gosford NYE Festival Great Northwalk 100's June Long Weekend Classical Music Festival Kariong Community Fun Festival Midday Monster Mash (Trick or Treat)	Wagstaffe Ettalong Beach Kariong Gosford Green Point Ettalong Beach Gosford Gosford Patonga Pearl Beach Kariong Gosford
Markets	Location
Avoca Beachside Markets Central Coast Christmas Fair Central Coast Christmas Fair 2012 Davistown RSL Markets Easter Saturday Monster Book Fair Ettalong Beach Markets French Country Market Gosford City Markets Mangrove Mountain Country Fair Ourimbah RSL Markets Patonga Easter Fete Point Clare Markets Terrigal Antique and Vintage Fair	Avoca Beach Terrigal Avoca Davistown Pearl Beach Ettalong Beach Springfield Gosford Mangrove Mountain Davistown Patonga Point Clare Terrigal
Performances	Location
Monthly Comedy Night Opera in the Arboretum Rasa Duende - Album Launch Tunes in the Afternoon	Woy Woy Pearl Beach Yattalunga Erina
Sporting Events	Location
Adrenathon - The Ultimate Adventure Race Bay to Bay Fun Run Century Challenge Cycle Ryde Gosford Quarries Gosford Gold Cup NSW Surf Life Saving Championships Singo's Meats ANZAC Day Race Day The Stampede Tough Mudder	Peats Ridge Gosford Somersby Gosford Umina Gosford Glenworth Valley Calga
Product Type - Sporting Facilities	
Alan Davidson Oval Austin Butler Oval Central Coast Stadium Davistown Memorial Oval Duffy's Reserve Erina High School Oval Erina Oval Ettalong Oval Eve Williams Memorial Oval Fagans Park Fred Pinkstone Oval Frost Reserve Garnet Adcock Memorial Park	Wyoming Woy Woy Gosford Davistown Terrigal Erina Erina Ettalong Patonga Point Clare Peats Ridge Kincumber West Gosford

Appendix 8: Gosford LGA Product Audit (cont)

Product Type - Sporting Facilities	
Gavenlock Oval Heazlett Park Hylton Moore Park James Brown Oval Kariong Recreational Area Kitchener Park Leagues Club Field Lemon Grove Park Mackillop Oval - De La Salle Recreation Maidens Brush Oval Mangrove Mountain District Oval Mountain McEvoy Oval	Narara Avoca Beach East Gosford Woy Woy Kariong Ettalong Gosford Ettalong Kincumber South Wyoming Mangrove Umina

Product Type - Sporting Facilities	
Paddy Clifton Oval Patrick Croke Oval Paul Oval Rogers Park Saratoga Oval St Edwards Oval Terrigal Haven Terry Oval Umina Oval Victoria Park Woy Woy Park	Narara Kincumber Matcham Woy Woy Saratoga East Gosford Terrigal Springfield Umina Gosford Woy Woy

Appendix 9: Wyong LGA Product Audit

Product Type - Accommodation	
Apartments	Location
Allamanda Retreat Foreshore Court Sandy Cove Apartments Sea Side Flats Michelle Maree Seaside Apartments	Long Jetty The Entrance Nth The Entrance The Entrance The Entrance
Backpackers and Hostels	Location
Backpackers @ The Entrance The Entrance Backpackers	The Entrance The Entrance
Bed and Breakfast	Location
Al Mare Beachfront Retreat All Comfort B&B Bateau Bay Beachfront Breeze Bed and Breakfast Cedarbrush Downs Green Acres Bed & Breakfast Forest Park Country Retreat Lavender House Bed & Breakfast Rijdale B&B	Blue Bay Hamlyn Terrace Bateau Bay Bateau Bay Cedar Brush Creek Mardi Kulnura The Entrance Glenning Valley
Cabins and Cottages	Location
Lake Haven Castle Cottage Norah Head Lighthouse Quarters Shelly Beach Cabins Toowoan Bay Corner Cottage Toowoan Bay Cottage Two Shores Holiday Village	Lakehaven Norah Head Shelly Beach Toowoan Bay Toowoan Bay The Entrance Nth
Caravan and Camping	Location
A Paradise Park Cabins Big 4 Lake Macquarie Holiday Park Blue Bay Camping & Caravan Tourist Park Blue Lagoon Beach Resort Budgewoi Holiday Park Canton Beach Holiday Park Central Coast Eco Tours Dunleith Caravan Park Lakeview Tourist Park Norah Head Holiday Park Oasis Caratel Caravan Park Sun Valley Tourist Park Toowoan Bay Holiday Park	Long Jetty Mannering Park The Entrance Bateau Bay Budgewoi Toukley Ourimbah The Entrance Nth Long Jetty Norah Head Kanwal Bateau Bay Toowoan Bay

Product Type - Accommodation	
Two Shores Holiday Village Walu Caravan Park Waterfront Tourist Park	The Entrance Nth Budgewoi Canton Beach
Holiday Houses	Location
Bamboo House Bateau Bay Beachfront Bateau Bay Luxury Spa Accommodation Beachfront at Blue Bay Blue Lagoon Beach House Golf-Beach House Lavender House By The Sea Talinga Waterfront Beach House The Noraville Hideaway House	Kanwal Bateau Bay Bateau Bay Blue Bay Bateau Bay Shelly Beach The Entrance Blue Bay Noraville
Farm Stay	Location
Hidden Valley Farm	Palm Grove
Hotel/Motel	Location
Bateau Bay Hotel Motel Best Western Bridgeview Motel Buccaneer Motel Central Coast Motel Chittaway Motel Coachman Motor Inn Dam Hotel El Lago Waters Resort Hibiscus Lakeside Motel Jetty Motel Lake Front Motel Lake Haven Motor Inn Lake Munmorah Motel Ocean Front At The Entrance Orana Hotel Unit Palm Court Motel Sapphire Palms Motel Sea N Sun Motel The Beachcomber Hotel The Entrance Motel The Entrance Reef Motel The Waldorf Apartment Hotel Toukley Motor Inn Toukley Motel Tuggerah Lakes Motel	Bateau Bay Gorokan Long Jetty Wyong Chittaway Bay Long Jetty Wyong North The Entrance Budgewoi Long Jetty The Entrance Nth Gorokan Lake Munmorah The Entrance The Entrance Bateau Bay The Entrance Noraville Toukley Long Jetty The Entrance The Entrance Toukley Toukley Gorokan

Product Type - Accommodation

Lodge	Location
Breakaway	San Remo
Brushwood Lodge	Glenning Valley
Luxury	Location
Kims Beachside Hideaway	Toowoan Bay
Noonaweena	Kulnura
Quay West Magenta Shores	Magenta
Riveria Lakeside Waterfront Luxury	The Entrance
Resorts	Location
Mercure Kooindah Waters Golf & Spa Resort	Wyong
Oaks Waterfront Resort	The Entrance
Self Contained	Location
On Bumbles Creek	Ourimbah

Product Type - Attractions

Amusement and Theme Parks	Location
Amazement	Wyong Creek
Chipmunks Tuggerah	Tuggerah
Laserblast	Charmhaven
Kids HQ	North Wyong
Little Diggers Playland	The Entrance
Treetops Adventure Park	Wyong Creek
Charters Diving	Location
Pro-Dive Central Coast	Killarney Vale
Entertainment	Location
Canton Beach Sports Club	Toukley
Club Toukley RSL	Toukley
Club Tuggerah	Tuggerah
Diggers @ The Entrance	The Entrance
Doyalson Wyee RSL Club Ltd	Doyalson
Event Cinemas	Tuggerah
Gwandalan Bowling Club Ltd	Gwandalan
Halekulani Bowling Club	Budgewoi
Mingara Recreational Club	Tumbi Umbi
Munmorah United Bowling Club Ltd	Lake Munmorah
Norah Head Bowling & Sports Club Ltd	Norah Head
Ourimbah-Lisarow RSL Club Ltd	Ourimbah
Shelly Beach Golf Club	Shelly Beach
The Bay Sports Club	Bateau Bay
The Entrance Leagues Club Ltd	Bateau Bay
The Entrance Pelican Feeding	The Entrance
The Greens - The Entrance Bowling Club Ltd	The Entrance
Toukley Golf Club Ltd	Toukley
Wallarrah Bay Recreation Club	Gorokan
Wyong Bowling Club	Wyong
Wyong Golf Club Ltd	Wyong
Wyong Race Club	Wyong
Wyong RSL Sub Branch Club Ltd	Wyong
Wyong Rugby League Club Ltd	Kanwal

Product Type - Attractions cont.

Farming, Food and Produce	Location
Central Coast Wetlands Pioneer Dairy	Wyong
Little Creek Cheese Pty Ltd	Wyong
Luka Chocolate	Wyong
Roses To Go	Warnervale
The Wyong Milk Factory	Wyong
Galleries, Museums and Collections	Location
Artistique Photography By Nicolette	Long Jetty
Bobbie P Gallery	Wyong
Earl Hingston Gallery Of Art	Toukley
Jacqui's Art Studio Gallery	Buff Point
Toowoan Bay Gallery	Toowoan Bay
Toukley And Districts Art Society	Gorokan
Two Birds Gallery	Toowoan Bay
Historical Sites and Heritage Locations	Location
Norah Head Lighthouse	Norah Head
The Great North Road Convict Trail	Bucketty
Natural Attraction	Location
Bateau Bay Beach	Bateau Bay
Birdie Beach	Munmorah State Recreation Area
Coast To Lake Walk	The Entrance
Crackneck Lookout	Bateau Bay
Pelican Beach	Wyrabalong National Park
Frazer Beach	Munmorah State Recreation Area
Freemans Beach	Munmorah State Recreation Area
Lakes Beach	Budgewoi
Munmorah State Conservation Area	Lake Munmorah
North Entrance Beach	The Entrance North
Olney State Forest	Jilliby
Shelly Beach	Shelly Beach
Soldiers Beach	Norah Head
The Entrance Beach	The Entrance
The Entrance Ocean Baths	The Entrance
Toowoan Bay Beach	Toowoan Bay
Watagan State Forest	Wyong
Wyrabalong Lookout	Magenta
National Parks and Reserves	Location
Munmorah State Conservation Area	Lake Munmorah
Watagans National Park	Wyong
Wyrabalong National Park	Magenta
Observatories and Planetariums	Location
Koolang Observatory	Bucketty
Retail	Location
Adrift Surf	The Entrance
Bateau Bay Square	Bateau Bay
Lakeside Shopping Centre	The Entrance
Greater Toukley Vision	Toukley
Lake Haven Shopping Centre	Lake Haven
Waterfront Arts And Craft Markets	The Entrance
Westfield Tuggerah	Tuggerah

Product Type - Attractions cont.

Spas and Retreats	Location
Leela Traditional Thai Massage	The Entrance
Endota Spa	Wyong
Mii Spa	Magenta
Sports and Recreation	Location
6S Health	Tumbi Umbi
Bateau Bay Tenpin Bowl	Bateau Bay
Kooindah Waters Residential Golf & Spa Resort	Wyong
Magenta Shores Golf & Country Club	Magenta
Mini Golf At Mingara	Tumbi Umbi
Sandra English Surf Coaching	Budgewoi
Shelly Beach Golf Club	Shelly Beach
Supa Centa Tuggerah	Tuggerah
Toukley Golf Club	Toukley
Wyong Golf Club	Wyong
Transport	Location
Coastal Liner	Wyong
Red Bus	Bateau Bay
Wineries, Vineyards and Breweries	Location
Bluetongue Brewery	Warnervale
Zoos, Sanctuaries, Aquariums and Wildlife Parks	Location
Forest of Tranquility at the Australian Rainforest Sanctuary	Ourimbah

Product Type - Dining/Eating Out

Cafes	Location
Café La Soul	The Entrance
Café Style	Tuggerah
Glass Dome Coffee House	Budgewoi
Hog's Breath Café (Westfield)	Tuggerah
Mad Mex Fresh Mexican Grill	Tuggerah
Mel's Kitchen	Long Jetty
Mojo's Café Restaurant	The Entrance
Shonnell's Café Budgewoi	Budgewoi
The Bay Café Restaurant	Toowoan Bay
The Coffee Club	Tuggerah
The Roasted Berry (Mingara)	Tumbi Umbi
Toscani's Café Bar And Restaurant	Tuggerah
Pubs	Location
Bateau Bay Hotel	Bateau Bay
Dam Hotel Snake Creek Cattle	Wyong
Long Jetty Hotel	Long Jetty
Northlakes Tavern	Charmhaven
The Beachcomber Hotel	Toukley
The Lakes Hotel	The Entrance
The Tall Timbers	Ourimbah
Restaurants	Location
Angkara Malaysian	Buff Point
Arabian Lounge	The Entrance
Asian 99	Charmhaven
Asian Haven Restaurant	Toukley
Bai Boon 207 Thai	Toukley
BB's Restaurant	Bateau Bay

Product Type - Dining/Eating Out

Restaurants	Location
Brazilian Grill Bar & Restaurant	The Entrance
Cam's Court Chinese Restaurant	Charmhaven
Canton Chinese Restaurant	Toukley
Coco Banana Brazilian Churrasto	The Entrance
Fonzirelli	The Entrance
George's Family Restaurant	Berkeley Vale
Gold Racquet Family Restaurant	Wyong
Golden Lake Chinese Restaurant	Gorokan
Golden Leaves Chinese Restaurant	Bateau Bay
Ho Court	The Entrance
Hong Wing Chinese Restaurant	Killarney Vale
Indiana Raj	The Entrance
Indigo Restaurant (Mingara)	Tumbi Umbi
Jan's Chinese Malaysian Restaurant	The Entrance
Jetty Indian Tandoori Restaurant	Long Jetty
Jin Xin Chinese Restaurant	The Entrance
Jolly Good Indian Restaurant	Long Jetty
Jolly Good Indian Restaurant	Toukley
Jothi Indian Restaurant	Toukley
Kanwal Chinese Restaurant	Kanwal
Kenzies On The Hill	Long Jetty
Kim Vietnamese Restaurant	The Entrance
Kims	Toowoan Bay
La Bocca	Budgewoi
La Costa Restaurant	The Entrance
Lilly Thai Restaurant	Toukley
Lone Star Steakhouse And Saloon	Tuggerah
Long Jetty Chinese Restaurant	Long Jetty
Lotus Court Chinese Restaurant	Long Jetty
Ming Dragon (Mingara)	Tumbi Umbi
Mohr Indian Restaurant	Ourimbah
Mun Shing Chinese Restaurant	Ourimbah
Ocean Front Restaurant	The Entrance
Ocean Rest	Blue Bay
Ocean Thai Cuisine	Budgewoi
Olnix International Restaurant	Norah Head
Onni's Thai Restaurant	Charmhaven
Pelican Pizza	The Entrance
Pelican's Wharf Restaurant	The Entrance
Piercarlos Trattoria	The Entrance
Pizza In The Pan	Wyong
Pordella Italian Restaurant	Bateau Bay
Riverside Restaurant	Wyong
Ru's Chinese Restaurant	Wyong
Sandbar Café Restaurant	The Entrance
Sawan Thai	Tuggerah
Shorethyme Restaurant	Norah Head
Siam Terrace Thai Restaurant	Wyong
Silver Moon Chinese Restaurant	Budgewoi
Sounan Thai Restaurant	The Entrance
Star Buffet Family Restaurant	The Entrance
Star Light Thai	Bateau Bay
Sticky Rice Thai Restaurant	The Entrance

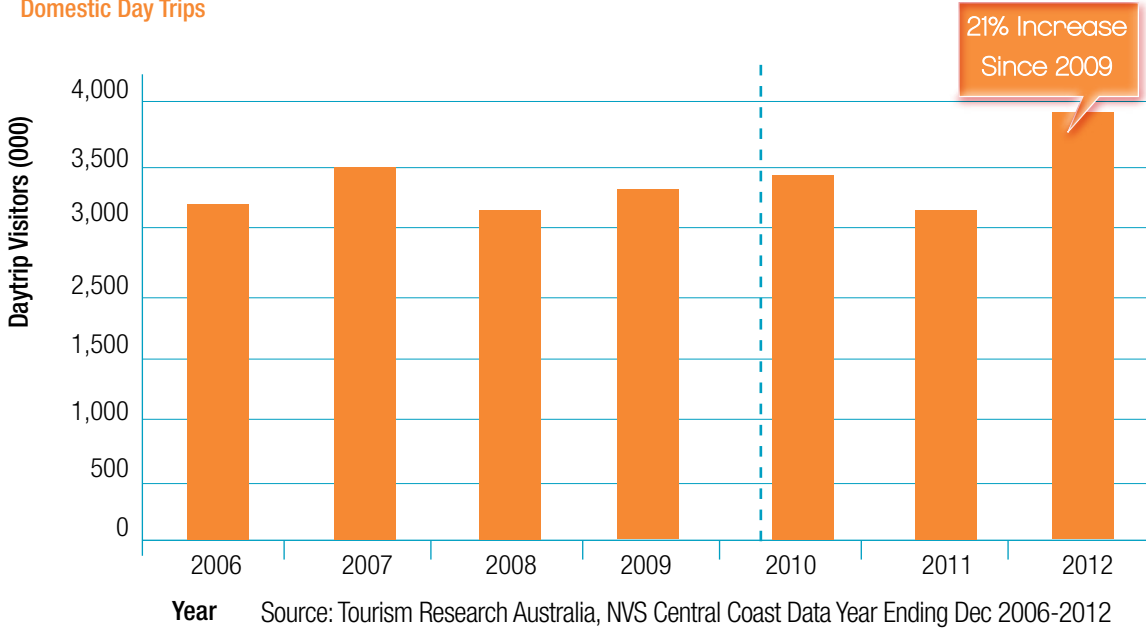
Product Type - Dining/Eating Out	
Restaurants (cont.)	Location
Thai Continue	Toukley
The Italian Restaurant	The Entrance
The Little Frog	Wyong
The Palms Restaurant	Gorokan
The Willows	Wyoming
Tides Restaurant	The Entrance
Time After Thyme Restaurant	Bateau Bay
Tim's Kitchen Chinese Takeaway	Wyong
Tuck Seng Chinese Restaurant	Charmhaven
Tuggerah Inn Chinese Restaurant	Tuggerah
Vesuvius Woodfired Pizzeria	Charmhaven
Wyong Licensed Chinese Restaurant	Wyong
Yarramalong Manor	Yarramalong
Take Away/Fast Food	Location
Bruces Pizza	Bateau Bay
Bua's Thai Take Away	Wyong
Darrons Seafood	The Entrance
Express Noodles Pty Ltd	Tuggerah
Fortune Cookie Noodle Bar (Mingara)	Tumbi Umbi
Master Noodle	Lake Haven
Pizza Inn	Tuggerah
Pizza Inn	Long Jetty
Pizza Inn	Charmhaven
Pizza Pit	Budgewoi
Preecha Thai Takeaway	The Entrance
Regent Chinese Takeaway	Berkeley Vale
Sorella Pizza Kitchen	Toowoan Bay
Thai Indeed	Killarney Vale
The Yabby Pot	Long Jetty
Product Type - Infrastructure	
Dump Point	Location
Budgewoi Holiday Park	Budgewoi
Caltex Service Station Northbound	Warnervale
Caltex Service Station Southbound	Warnervale
Canton Beach Holiday Park	Canton Beach
Norah Head Holiday Park	Norah Head
Toowoan Bay Holiday Park	Toowoan Bay
Accredited Visitor Information Centres	Location
Oliver's Real Food	Warnervale
The Entrance Visitor Information Centre	The Entrance
Toukley Art Society	Toukley
Education/Training/Facilities/Academies	Location
TAFE NSW	Ourimbah
University Of Newcastle	Ourimbah

Product Type - Hire	
Bicycles	Location
E-Bikes R US	Long Jetty
Boats	Location
Long Jetty Catamaran & Boat Hire	Long Jetty
Pelican Wharf Boat Hire	North Entrance
Campervans and Motorhomes	Location
Premier Camper Trailer Hire	Kangy Angy
Private Caravan Hire	Tuggerah
Minibuses and Coaches	Location
Coastal Liner Touring	Warnervale
Product Type - Tour	
Half Day or Less	Location
Norah Head Lighthouse	Norah Head
Sandra English Surf Coaching	Norah Head
Skydive The Central Coast	Warnervale
Product Type - Events	
Exhibitions and Shows	Location
All American Muscle Car Show	The Entrance
Central Coast Poker Championships	Mingara
Chromefest	The Entrance
Chrysler Show & Shine	Toukley
Easy Street Hot Rods Show & Shine	Toukley
Getting Hitched Wedding Expo	Mingara
Mingara Orchid Club Fair And Show	Mingara
Sculpture On The Greens	Wyong
Festivals and Celebrations	Location
Australia Day Eve	Canton Beach
ANZAC Day Commemorations	Central Coast
Carols By Candlelight By The Entrance	The Entrance
Central Coast Country Music Festival	The Entrance
Central Coast Ukulele Festival	The Entrance
Christmas Under The Stars	The Entrance
Food Fun & Music Festival	Toukley
Gathering Of The Clans	Norah Head
Going Off At The Swamp Family Festival	San Remo
Great North Walk 100's	Lake Macquarie
International Lighthouse Weekend	Norah Head
Lighting Of The Christmas Tree	The Entrance
New Years Eve Celebrations - The Entrance	The Entrance
Paws And Claws	The Entrance
Summer City Rumble	The Entrance
Tuggerah Lakes Mardi Gras	The Entrance
Whaledreamers Festival	Norah Head
Wyong Shire Australia Day Celebrations	The Entrance
X-up Australia's Freeride Festival	Warnervale
Sporting Events	Location
Central Coast Half Marathon	The Entrance
Fitness First Central Coast Sevens	
International Rugby Festival	Kanwal
Magic Millions Race Day	Wyong
Redass NSW ACT Downhill State Championships	Ourimbah
Wyong Gold Cup	Wyong

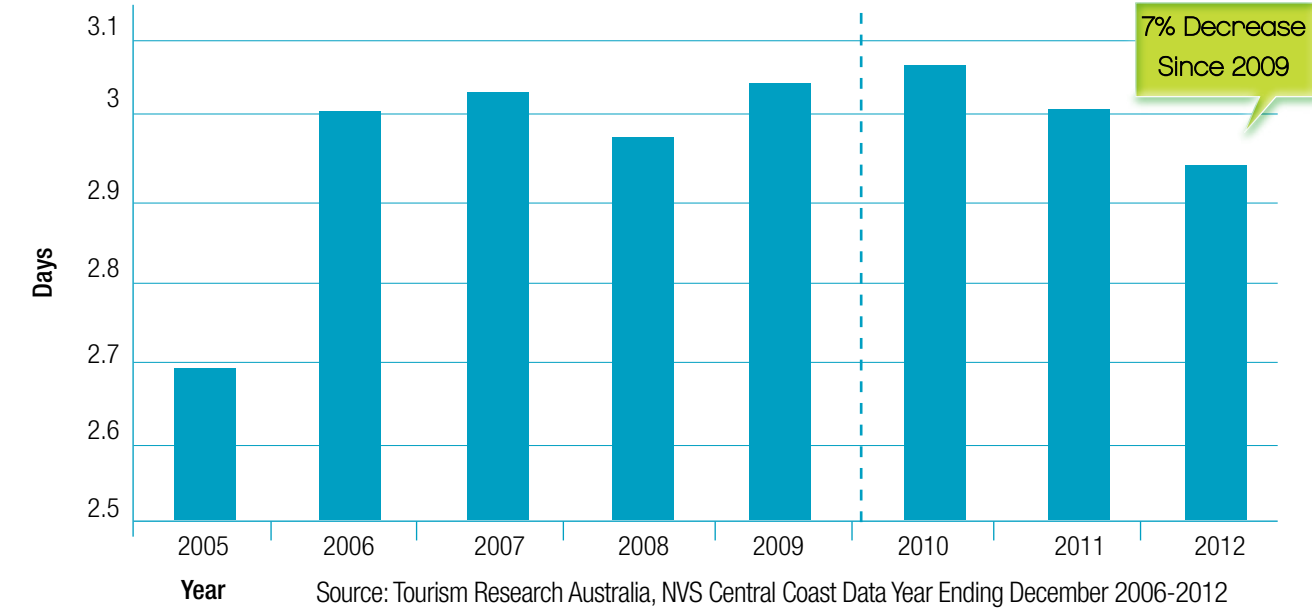
Product Type - Sporting Fields	
Adelaide St Oval	Killarney Vale
Baker Park	Wyong
Bateau Bay Oval	Bateau Bay
Bill Sohler Park	Ourimbah
Blue Haven Oval	Blue Haven
Buff Point Oval	Buff Point
Chittaway Oval	Chittaway Bay
Darren Kennedy Oval	Noraville
Don Small Oval	Tacoma
Eastern Road Oval	Killarney Vale
Edsacc Oval North	Bateau Bay
Edsacc Oval South	Bateau Bay
Halekulani Oval	Budgewoi
Hamlyn Terrace Sporting Facility	Hamlyn Terrace
Harry Moore Oval	Toukley
Jubilee Oval	Killarney Vale
Kanwal Oval	Kanwal
Killarney Vale Athletics	Killarney Vale
Product Type - Sporting Fields cont.	
Kurraba Oval	Berkeley Vale
Lake Haven Oval	Lake Haven
Manning Park Oval	Manning Park
Norah Head Hockey	Norah Head
Northlakes Oval	San Remo
Ourimbah Soccer	Ourimbah
Pat Morley Oval	Bateau Bay
Sir Joseph Banks Oval	Bateau Bay
Slade Park Oval	Budgewoi
Taylor Park	The Entrance
Ted Doyle Oval	Glenning Valley
Tuggerah Oval	Tuggerah
Tunkuwallin Oval	Gwandalan
Wadalba Sports Facility	Wyong
Warnervale Athletics	Warnervale
Watanobbi Oval	Watanobbi
Woongarrah Sports Facility	Woongarrah

Appendix 10: Key Source Markets and Consumer Segments Data

Domestic Day Trips

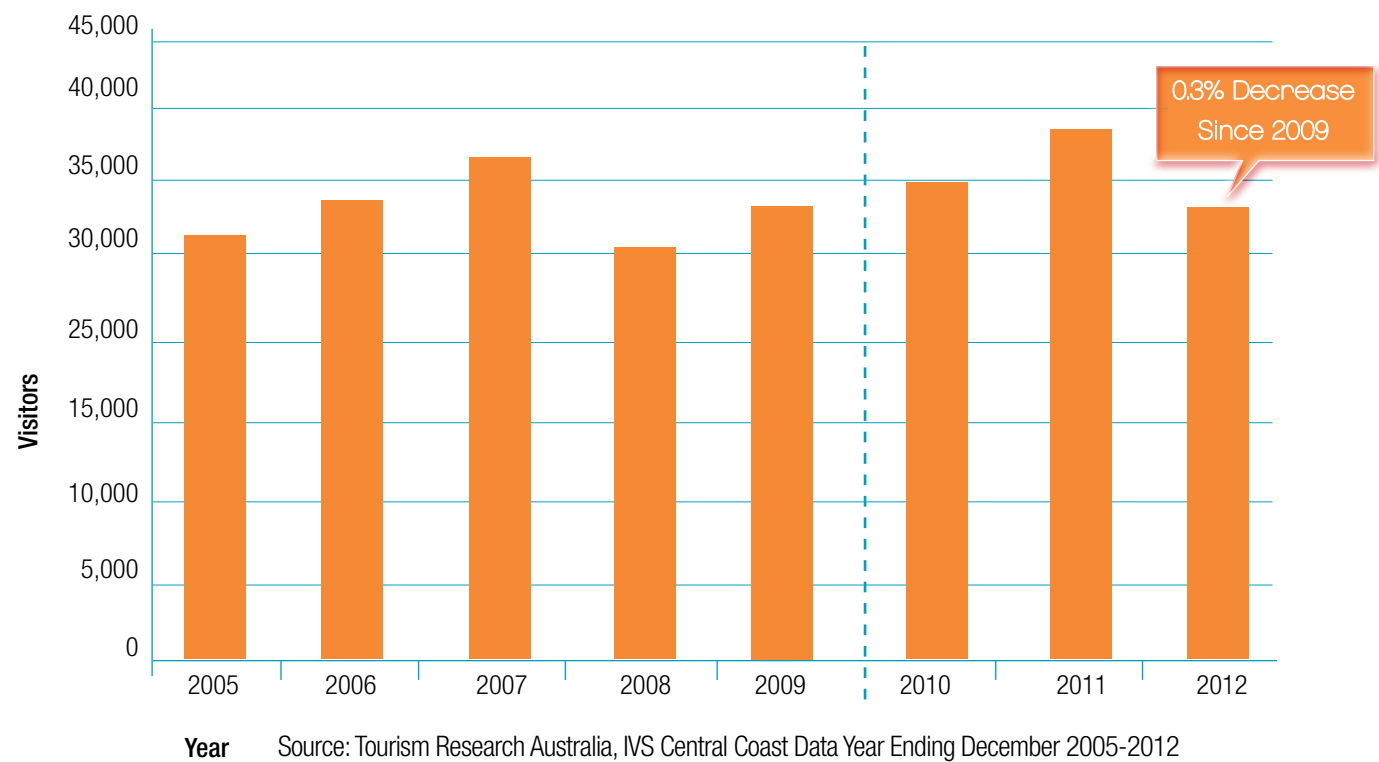


Domestic Overnight Average Length of Stay



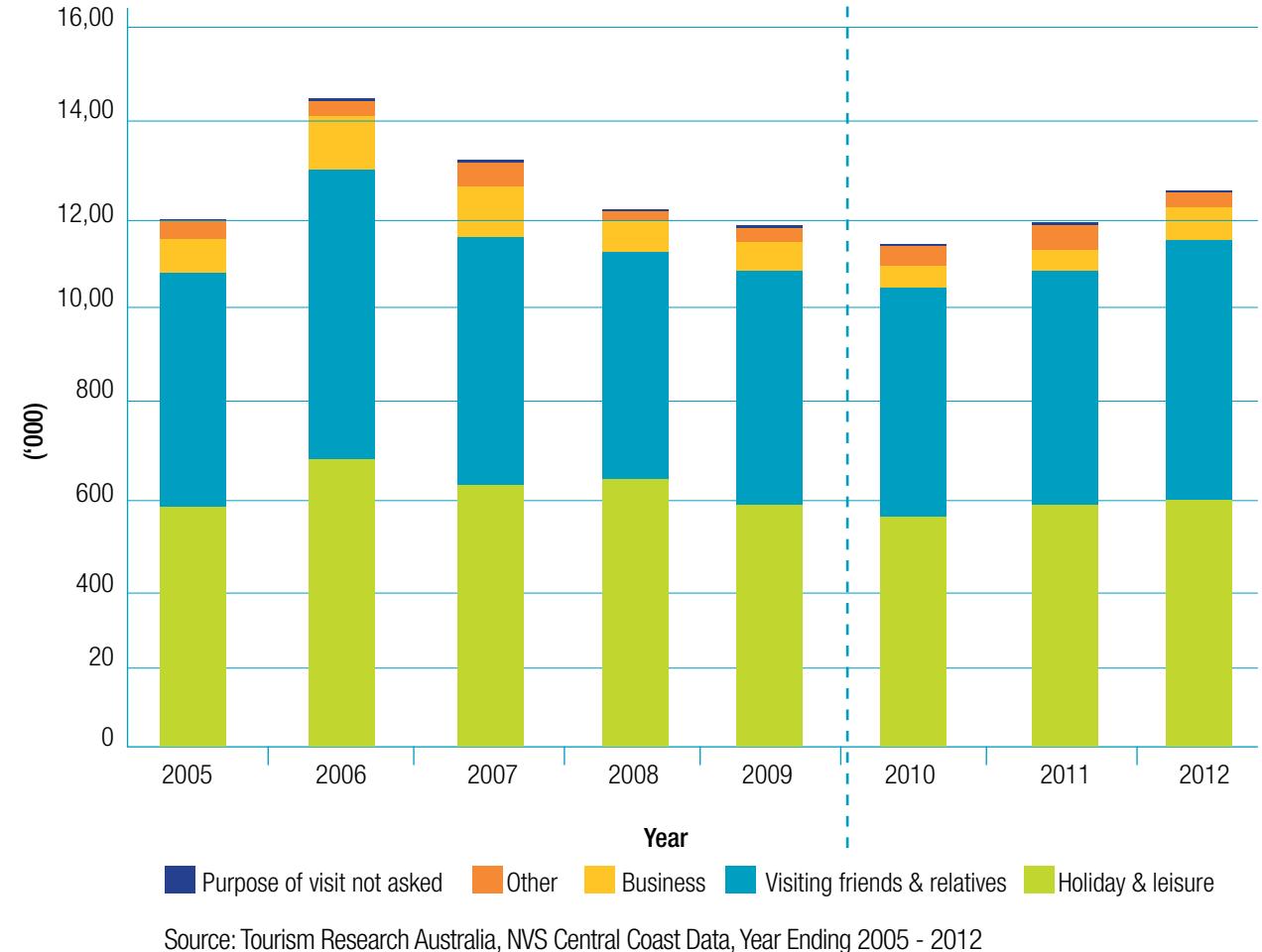
Appendix 10: Key Source Markets and Consumer Segments Data (cont).

International Overnight Visitors

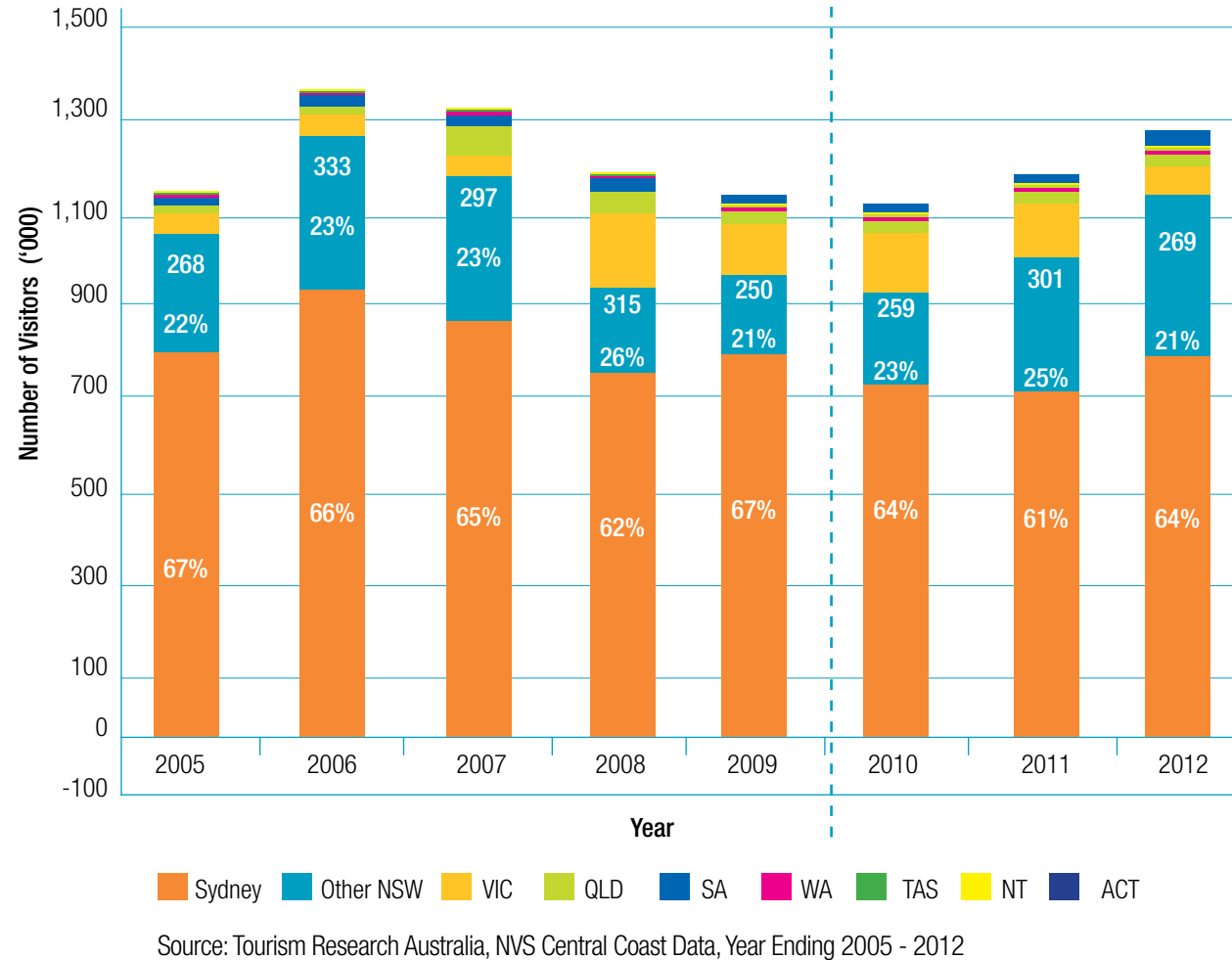


Appendix 10: Key Source Markets and Consumer Segments Data (cont).

Purpose of Visitation - Day and Overnight Visitors



Origin of Central Coast Day and Overnight Visitors



Grow our Market Share - Day and Overnight Visitors

