



CENTRAL COAST

TOURISM OPPORTUNITY PLAN

2019-2024

Central
Coast
Council



Photograph: Sarah Kate

What is our unique competitive advantage as a region?

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Executive summary

Great tourism destinations thrive on experiences – the all-important ‘reasons to visit’. The Central Coast has comfortably meandered its way to be an attractive holiday location amongst some of the other NSW coastal areas.

However without investment or reinvestment in the quality and depth of visitor experiences, the Central Coast region will not achieve its potential as a tourism destination.

A challenge is the negative perceptions about the region that are embedded in the hearts and minds of our target audiences, including our own residents and businesses. Working to change these perceptions requires a collective effort, touchpoint by touchpoint, with a strategic focus on improving even the smallest details that contribute to the overall experience of our region.

The unique advantages for the region should be clear to our visitors and residents, so that we all know exactly what we want to be known for, what we can do and say to create a strategically deliberate set of

perceptions and experiences. The Central Coast can then take and grow its share of the surrounding visitor economy, by becoming a magnetically attractive destination in its own right.

Significant benefits will also flow to our community through vibrant places that improve well-being and are attractive to new businesses and residents; create employment opportunities and investment in new infrastructure and facilities for the enjoyment of all.

To deliver this ambition, we will commit to taking share via regional collaboration, strategic decision making, prioritising experience developments, improving the quality of visitor experiences and destination marketing owned by all.

The focus of the Tourism Opportunity Plan (TOP) is on growing the sustainable tourism value of our region, rather than growing outright visitor numbers. It provides activation opportunities which can be instrumental for the Central Coast in achieving its economic, community and environmental ambitions over the next decade.



Photograph: Mitch Lee



The success of
this Plan will be
the improved
perception of the
Central Coast

Introduction

The TOP provides strategic direction to guide tourism and the opportunities it creates for the Central Coast.

The TOP recognises the strengths of the region and seeks greater efforts to capitalise on these for the sustainability of tourism for the Central Coast economy. The key challenges and opportunities have been identified and consideration given to the current tourism market, consumer research and product review for the Central Coast; alongside global tourism trends, tourism-sector specific research and market behaviours. Opportunities for future tourism capital investment and product development are identified.

Consultation was undertaken to develop this TOP, including with business owners, regional and community organisations and Central Coast Council employees. The TOP also draws on Central Coast Council key strategies and plans, including the strategic priorities for economic development and those in the Central Coast Destination Management Plan 2018-2021 (DMP).

This TOP does not purport to canvas all possible opportunities for the region, or select opportunities based on geographic areas of the Central Coast region.

Guiding Principles

It provides a framework on which to examine new experience development concepts and analyse these around three guiding principles which can influence successful destination management planning:

- Market demand characteristics inclusive of already available target consumer markets, yield potential and global trends
- Links to current competitive strengths of the region, and/or created advantage build in-progress
- Value add to the local community of residents and businesses and their overall quality of life.



From a long list of potential concepts analysed, recommendations have been made about those experiences. Next steps are to build high-level costings and demand forecasts that can be used to facilitate and encourage independent investment or support future detailed analysis and business case development.

The success of this TOP will be the improved perception of the Central Coast and all that flows from that for resident's quality of life, visitor positive experiences and economic growth. Indicators will be increase in awareness and intentions to travel to the Central Coast, attraction of new markets and investment, visitation and expenditure and satisfied key stakeholders.

Taking Share via Regional Collaborations

The TOP also proactively positions the Central Coast as a key player in various regional strategies, which have been created to work with NSW Destination Networks collaboratively.

The Destination Sydney Surrounds North Destination Management Plan has a priority to help the region north of Sydney maximise available funding programs. The TOP strategically positions the Central Coast to mature its approach to funding opportunities and capitalise on the benefits that can flow to the region.

The NSW Food and Wine Tourism Strategy offers opportunity to leverage government and industry food and wine programs, identify growth initiatives, address limitations such as supply chain constraints, legislative barriers and skills shortages, and provide an environment for industry to grow its networks. The Central Coast, as a relatively immature, albeit growing rapidly, food and wine offering, can benefit from this collaboration.

Central Coast



Our region

The Central Coast is located on the coast of New South Wales, positioned midway between Sydney and Newcastle, providing a population catchment in excess of 5 million people within an approximate 90 minute drive time radius.

The Central Coast is well known for its outstanding natural amenity with the region itself home to nearly 340,000 residents, with further growth forecasts rising to an estimated population of 415,000 by 2036.

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

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



Photograph: Sarah Kate

TOTAL VISITOR EXPENDITURE

Central Coast **\$801 million**
 Destination Sydney Surrounds North **\$4.06 billion**
 New South Wales **\$33.2 billion**
 (TRA 2017)

CENTRAL COAST 2024 GOAL



Grow number of tourists above NSW average growth in the value and visitation



Grow the value of the visitor economy by \$70M per annum

(Central Coast Destination Management Plan 2018-2021)

Our region has a strong need for a clear and compelling positioning



Photograph: Headjam

Situation Analysis

The Central Coast region's potential to improve tourism outcomes has been assessed through consumer research and consultation to identify challenges and opportunities, produce a product and experience review summary and customers and markets summary. Lonely Planet describes the diverse geography of the Central Coast region as the feature that makes it a fascinating destination to visitors from working class and retirees to Sydney socialites and weekenders.

CHALLENGES

- The region is losing market share of the key Sydney outbound visitor market
- No stated distinctive or unique features
- Lack of awareness or poor perceptions of the Central Coast
- Lack of a clear identity and competitive messaging
- Perceived lack of work and activities to retain young people in the area
- Risk in investment and re-investment in product (especially large-scale and boutique)
- Funding changes and reduction in available funds and grants available to smaller, private organisations in region (marketing dollars and capital)
- Lack of research in transport forecasting and funding to build transport and connectivity around the region, especially from train stations
- Location lends itself towards the destination being regarded as a drive through or 'pit-stop' region, along the M1; lack of wayfinding signage on M1 contributes to the issue
- Population has grown, but not at the same rate as jobs and infrastructure
- Lack of wayfinding signage for visitors, once they come through gateways off M1 and all across the region
- Low availability of a range of accommodation options (especially boutique and high-end, although air bnb has somewhat mitigated this)
- Low level of integration with tourism goals and planning scheme
- Lack of established activities and experiences in trails and walkways classification
- Adventures here but undefined and unpackaged
- Perception as a summer destination

OPPORTUNITIES

- Need for a thread to pull all of the region together – an engaging destination brand, clear common vision and mission, compelling positioning, USP for competitive differentiation
- Commitment and engagement of industry
- Collaborative industry and resident marketing to increase curated content and promote the positive changes of the Central Coast (create raving fans and local brand advocates)
- Rise of social media messaging and cut-through
- Enable the activation of waterfront and waterways
- Proximity to Sydney and Newcastle (getaway destination within 90mins)
- Natural beauty backdrop and surroundings – national parks, state forests, lakes, waterways, walkways, headlands, beaches and hinterland
- Organic growth of high-quality restaurants and café culture
- Higher-quality accommodation product to increase diversity and motivation to visit
- Enable and educate industry to dramatically raise service levels as a stand-out feature of the Central Coast experience
- Enhance the appeal of Central Coast through activation of key town centres, arts and culture
- Build strategic partnerships that align with our Destination Brand and Values
- Enable key infrastructure delivery and upgrades
- Leverage DNSW and align with their target growth opportunities
- Explore aging population (grey nomad markets)
- Packaging of products collaboration
- Strong 'Food Industry' to connect with the local agriculture industry for Agri-Tourism
- Research on the future traveler market (i.e. millennials vs baby boomers)
- Potential for an Ambassadors Program to include locals into a VFR campaign
- 150 villages



We must create
a paradigm shift
in perceptions

Photograph: Sarah Kate

Product and experience review

The Central Coast has obvious strengths in beach, coastal and nature-based experiences. From the perspective of attracting new investment, analysis highlights a number of considerations in common with other NSW coastal destinations and some that are uniquely relevant for the Central Coast.

Challenges for the Central Coast remain:

Perception problem. A perception problem in its core Sydney visitor market – with perceptions either being negative or having a limited level of perception/awareness. New and improved reasons to visit are required to help change these entrenched perceptions.

Monetisation. A large proportion of the activities enjoyed by visitors to the Central Coast are relatively low value (informal walking, self-guided mountain biking and visiting the beach etc.). While the Central Coast area's average daily expenditure compares favourably with most of its NSW south coast neighbours, more can be done to grow daily visitor yield.

Depth and range of accommodation. The profile of the Central Coast's commercial accommodation stock is distinct – beds and room-stock available from sharing accommodation outnumber commercial provision. Hotel stock is limited at present. The relatively low level of hotel stock is a function of a number of factors - large day visitor market, low level of Meetings, Incentive,

Conference and Exhibition (MICE) activity and the seasonal nature of the destination. From a longer-term perspective, increasing the depth and range of experiences is essential in terms of improving Central Coast's appeal from an investment perspective.

Depth of food and drink. Visitor expectations in terms of authentic food and drink experiences have risen significantly over recent years - a base level of provision is an essential destination component, not an option. While the Central Coast region has a number of artisan providers and larger businesses, lack of depth in service offerings means that it cannot currently be regarded as a 'foodie' destination.

Lack of 'Wow' factor. Increasingly destinations are judged by their standout or signature experiences - the experiences that the destination is known for which act as key motivators for trips. The Pelican Feeding as well as a number of key adventure sports activities are the features most closely associated with Central Coast. New investment is needed to create new reasons to visit.

There are a number of other considerations for attracting new tourism investment to a region and for the Central Coast these are:



Family-friendly. The range of family-friendly experiences is a core strength – ranging from soft adventure to beaches.

Nature-based experiences. Extensive coastline and hinterland provide nature-based options for visitors, including a network of trails and walkways.

Soft Adventure. A strong set of 'soft adventure' experiences, including adventure parks, trails and surf breaks and beaches to suit all tastes. There is however a lack of paid adventure experiences.

Trading patterns. Strongly focused on daytime activities, with limited twilight and evening experiences. Longer opening periods (beyond 3pm) for shops and restaurants would need to be sustained by local demand as well as visitor markets.

Arts, culture and music. A local arts, culture and music scene can contribute to the overall visitor experience.

Indigenous experiences. While an extensive range of indigenous experiences are not currently easily accessible by visitors, there is history and culture that offers a rich range of stories and opportunities for this growing cultural heritage tourism market segment.

Events. A strong program of events plays an important role in the Central Coast area's overall 'vibrancy' offering to visitors.

Accessibility and inclusion. A growing tourism market segment that requires training for business and the community to both develop and promote Central Coast as an accessible community and holiday destination for those with disabilities.



Photograph: David Ross

Customers and Markets

Focusing on customers and markets that can offer the best return on investment is an essential strategy in the context of today's global competitive tourism markets. Informed by visitor analytics, consumer research and the Central Coast destination offerings, three key customer personas have been developed. Each of the customer personas are not just united by their age and demographic, but also their aspirations, challenges, wants and needs when it comes to visiting the region.

Blooming Families

The audience are very family focused and highly value experiences and time spent with their family unit
Household size 3-4



28%

Active Travel Couples

The audience are extremely adventurous, chasing both landmark and off-the-beaten track experiences
Status Married, De facto, Engaged



30%

Developing Families

The audience are extremely busy juggling day-to-day and find it hard to relax and unwind
Household size 5+



42%

Motivation

I like to go away on weekends and spend time with family and friends

I like to go away on weekends
I'm always very active on holidays

I enjoy holidays where everything is organised for you
On holidays I do as little as possible

Challenges

Wouldn't travel to do things I can do locally, avoid long distance travel times

Locations must facilitate activities and facilities that help build moments and memories

Need activities for different ages and value for money

Opportunities

Showcase quick weekend and outdoor escapes geared towards toddlers

Showcase adventure enthused outdoor weekend escapes

Showcase quick weekend and outdoor escapes geared towards kids.



Blooming Families



Active Travel Couples



Developing Families

How do they research*



1. Search
2. Family and Friends
3. Previous experience
4. No previous research done
5. Travel websites
6. Guidebooks



1. Internet Search
2. Friends, Relatives, colleagues
3. Previous Experience
4. Accomm/experience provider
5. Travel Websites
6. Travel Guides
7. Advertising/Marketing



1. Search
2. Previous experience
3. Family and Friends
4. No previous research done
5. Travel websites

How do they book



1. Direct with accomm provider via web
2. Direct with other provider via web
3. Do not book anything
4. Specialised travel website
5. Travel agent



1. Direct with accomm provider via web
2. Direct with other provider via web
3. Do not book anything
4. Specialised travel website



1. Direct with accomm provider via web
2. Direct with other provider via web
3. Do not book anything
4. Specialised travel website
5. Travel agent

How do they travel?



Own or company car or Rental Car



Own or company car or Rental Car
Rail (small) Water-based (very small)



Own or company car or Rental Car

How long and where they stay

**3.9
nights**



1. Holiday parks
2. Holiday house
3. Cottage
4. Motel
5. Resort

**2.2
nights**



1. Resort
2. Spa retreat
3. B and B
4. Cottage
5. Holiday house

**4.4
nights**



1. Camping
2. Caravan
3. Holiday park
4. Holiday house
5. Cottage

*YT Dec 2018) against HVT Segment data from TEQ and based on industry experience and other published studies <https://cdn1teq.queensland.com/~media/e3772d1ceaff47a4ab8503d777cd540b.ashx?vs=1&d=20180606T134825>

Strategic Pillars

The three strategic pillars aim to achieve the goals as outlined in the CCDMP to grow the value of the visitor economy, to target off-peak growth, to leverage natural and built assets in the region, to foster community support and to ensure the value of the Central Coast destination grows at a rate above the NSW average growth.

Three strategic pillars:

1. Creating advantage and changing perceptions with a destination brand strategy
2. Improving 1000 Little Things
– *sweating the small stuff*
3. Strategically aligned independent investment opportunities.



Photograph: Jacs Powell

Destination
Brand Strategy

Investment
Opportunities

The Central
Coast Region
as a vibrant
magnetically
attractive place
to live, work
and visit

1000 Little
Things

IMMEDIATE RESPONSE:

"There is something fresh and exciting
happening on the Central Coast right now...
it feels vibrant, creative, innovative...and I
want to be part of the experience!"

EXTENDED IMPACT: Create raving fans and brand advocates
across all audience buckets – visitors, businesses, residents

**ENERGY, EXCITEMENT, ENGAGEMENT, ACTION,
POSITIVE SUSTAINABLE SHIFT**



Create your
own adventure,
every day

Photograph: Sarah Kate

Destination Brand Strategy

What is a Destination Brand?

Destination branding is about identifying the destination's strongest and most competitively appealing assets, building a story from these and running this narrative consistently through all marketing and communications.

2021 Vision:

The Central Coast region as a vibrant, magnetically attractive place to stay and play.

Our Mission:

The Central Coast is a creative enclave – yes, right now. It is home to a plethora of makers and creators – professional dancers, actors, writers, musicians, film-makers, visual artists and performers – of global importance and talent. Our mission is to enable, support and grow this vibrant and exciting enclave by attracting like-minded Makers and Creators, all interpretations of creative thinkers and doers, from all parts of Australia, to create a truly unique advantage for our region, which will help us to achieve our vision.

Strategic Objectives:

- Change the perceptions of the Central Coast to create a desirable place to live, work and visit
- Create raving fans and brand advocates across all audience buckets – visitors, businesses, residents

Creating Competitive Advantage with our Positioning:

The Central Coast is dynamic, layered, complex, and is filled from tip to toe with interesting pockets and places to explore. There are unique opportunities everywhere you look for creating your own adventure... in business, innovation, exploration, arts, culture, great food, quirky shops and more. All of these layers and pieces make up the rich and unique tapestry of our region, created by the everyday adventures of the people who live, work and visit here. Here on the Central Coast, **we are Makers and Creators**, enabling, supporting and celebrating the creative hands, minds and personal adventures of all who wish to join us.

TAG: ***Create Your Own Adventure, every day.***



Key messages:

Life is an adventure! Whether it's a business venture, a long weekend away, an artistic expression, a simple idea that creates a complete paradigm shift – here on the Central Coast you can create your own adventure, big or small, every day.

The unique opportunity for life on the Coast – whether living, working or visiting – is the freedom to create it your own way. *Create Your Own Adventure, every day.*

Target Audience:

- Visitor to NSW, including people visiting friends and family that live on the Coast
- Creative and innovative business
- Local residents living in-region
- Residents of Sydney and other regions, looking for a new home, with reasonable access to a major city

By considering factors including; potential funding, available opportunities and hierarchy of influence, the short term focus has been strategically limited to the above four segments. By leveraging these segments in order to measurably increase perception change of the Central Coast in the first instance, a halo effect can

be created which encompasses the national Australian and overseas inbound segments, this will position the destination positively for when the strategy is able to broaden and start directly targeting these markets further afield. We weave our brand promises into all marketing and communications, to the three audience groups of visitors, businesses and residents, so they begin to understand:

- How they will feel when they are here
- What they will experience that is unique and special
- Why they should choose to live, work, visit here over all other places

Brand Personality:

Creative, vibrant, innovative, naturally beautiful (inside and out), smart, progressive, calm, intelligent, future focused.



Photograph: Lisa Haymes

Improving 1000 Little Things

What if we approached the tourism opportunities available from a different perspective? What if, instead of proposing or investing in just three or four new BIG things for the Central Coast, that take a substantial amount of funding, effort and time, why not *sweat the small stuff* and also focus on **1000 Little Things We Could Do?**

There are so many “little” things that need to be done all over the region! When we asked a small group of stakeholders what they would do, we got a flood of ideas! As part of the development of the 1000 Little Things concept development, an initial round of engagement has been undertaken to investigate this concept as a tourism opportunity in itself. Stakeholders were asked to consider: If you could choose ‘5 little things’ you would improve across the Central Coast region, that would benefit our residents, visitors and businesses alike, what would you choose?

The benefits of this opportunity is that “Little things” can be accomplished fairly quickly and easily, without a big project plan or lots of approvals. They can be undertaken by Council, residents or industry and can be defined as anything that improves the experience of our region, however small, from the aesthetics of the physical region to better food & beverage service levels or extended retail hours at local businesses.

The suggestions for 1000 Little Things that we could do fell into three broad categories:

1. Better Customer Experience with Improved Aesthetics & Atmosphere

This category highlighted little things that could be done to improve the look and feel of our region on a tangible and tactile level. These little things range from keeping our streets and towns clean and tidy to allow for better utilisation of the regions amenities.

Example Little Things:

- Install new modern signage - uniform suburb and gateway signage for brand consistency
- Modernising our physical Visitor Information Centre
- Developing methods to make public bathrooms, play areas and shared spaces more user friendly and tidy.

2. Revitalising our places. Activations to Encourage and Facilitate Visitor Dispersal across the Region

This category aims to encompass little things that embrace art and music within our public spaces, utilisation of the regions natural assets and assiting people to find their way across the destination.



1000 little things that we could do would, collectively, make a BIG difference

Example Little Things:

- Initiatives to support live music and regional beautification through artists and creatives
- Develop strategies to develop wayfinding signage and activations for shared spaces and places
- Encourage the repurposing of heritage buildings and community spaces.

3. Foster positive perceptions by upskilling and developing local business

This category delves into the management and undertaking of business in the Central Coast region from improving customer experience, incentivising businesses to improve local offerings and engaging locals to activate the destination.

Example Little Things:

- Help private industry better understand how to improve their service levels with training programs
- Undertake more smaller incentives to relocate larger corporate business to the Central Coast
- Establish a Visiting Friends and Relatives program to activate our residents to become local ambassadors.

There really are **1000 Little Things That We Could Do**, which, collectively, would make a BIG difference to the experience the Central Coast offers, whether living, working or visiting the region.

Therefore this becomes more than just a tourism opportunity plan for business and investors – it is about creating opportunities for everyone to make a real difference when it comes to changing perceptions of the Central Coast, with a cohesive strategic direction and a Reason-to-Believe, or Purpose.

When our Tourism Opportunity Plan works together with our Destination Brand Strategy, we can all work toward giving visitors a better experience, bringing greater success to businesses of all sizes here on the coast, and providing a better quality of life and stronger pride-in-place for residents.

The next step to turn this concept into an opportunity is to identify the stakeholders who can both suggest and activate the 1000 little things.

And the best part about **1000 Little Things** is that they can all start *now* and everyone can participate and contribute. It is a cohesive collection of strategically deliberate small changes, which feel easier, more manageable, less costly – things that can produce some immediate results to start, and quickly start to shift the energy, the experience and the perceptions to P for Positive.



We are Makers
and Creators

Photograph: Allisha Gore

Investment Opportunities

Activation and investment can deliver experiences that complement and add value to the Central Coast landscape, precincts and existing experiences. Plus foster those experiences that are not yet fully formed but contribute to the region's unique positioning. These experiences are a mix of both easy implementation and aspirational long-term visionary experiences that while innovative, would require significant further detailed analysis to determine feasibility. They all have in common the potential to drive further economic activity for the Central Coast through place activation, new product development and enhancing the region's places and spaces.

Place Activation

Place activation creates a destination within a destination, encourages social adventures and exploration, and brings energy and excitement to the streets, town centres and open spaces. Additionally, these projects create new community connections and work to build the story of a place. Activation can be expressed in a multitude of ways through arts and culture, food and beverage, play, performance, health and well-being and feel-good contributions to like-minded causes.

Activation initiatives can be an opportunity for communities and Council to contribute to the overarching "surround-sound" Destination Brand, creating the strategically deliberate perceptions and experiences that build the brand and positioning, touchpoint-by-touchpoint. These concepts contribute to the aggregate attractiveness of the region and can support visitor dispersal around the region and reasons to stay longer.

We are Makers and Creators. This is the Central Coast.

Food and Beverage Exploration Trail

The depth of food and drink product for the Central Coast continues to expand at the same time as the niche *Agritourism Experience Seekers* – who want to value the experience of the whole lifecycle of produce from paddock to plate. Events such as the annual Harvest Festival encourage this activity in the region's hinterland. A combination of marketing support and

business development can aid capacity building with local producers and farm door operators to simply enhance the appeal of behind the scenes tours and tasting experiences, showcasing our outstanding range of food and beverage Makers and Creators, for this market. Investment to develop can be in the range of \$100,000 - \$120,000.

Art and Sculpture Trail

As a creative enclave, the Central Coast is already home to a plethora of talented sculptors and installation artists, our Makers and Creators in the fine arts. Combining a regional sculpture trail with an app/digital tech platform and commissioning local artists can greatly contribute to regional image and perception change. Successfully delivered large scale, 'instagrammable' public art can attract an increased market share to the coast and provide one of the Wow Factor touchpoints we seek to add uniqueness to our experience. Investment of around \$2-3 million has the potential to generate over \$93 million in visitor expenditure within five years.

Twilight Economy

Again as a creative enclave, our region is home to many musicians and performers of globally recognised talent; however, we need to better support these entertainers with an expanded the choice of places and spaces, times and dates, from which they can entertain our visitors and residents. We have also noted in our visitor research that our hours of operation for food and beverage venues and retail shops are potentially limiting to our overall experience. One such expansion could lie in the opportunity to encourage and support a Twilight Economy here on the Central Coast.

Recent 2019 analysis by Deloitte Access Economics has found economic activity after dark in Sydney is now worth \$27 billion a year and supports more than 230,000 jobs. But it could be far bigger. The report states Sydney is missing out on about \$16 billion a year because its night-time economy is underdeveloped. To pull it up to compete with other globally important cities and destinations, a range of sectors would need to expand services after dark including arts and culture, retail and entertainment.



A vibrant night time economy is a catalyst for growth

Photograph: Sarah Kate

“A vibrant night-time economy creates a range of opportunities for providers and users; from 24-hour gyms and supermarkets to late-night art galleries, to extended shopping and transport choices,” the report says. Arts and Culture, including live music and performance, was highlighted as a catalyst to growth.

The total economic visitation value of arts and cultural infrastructure and events in NSW is \$1.4 billion per year and the value of this to broader society is \$484 million per year, the Deloitte report said.

Culture and Education

Heritage Tourism

Heritage tourism provides diversity to the visitor experience, creating unique and authentic experiences of places, stories, and activities that express our local culture and identity, and extend beyond the current bush and beach focus. Heritage provides a direct contribution to the visitor economy through its involvement with enhanced tourism infrastructure, products and services. It results in a more diversified visitor pattern by encouraging reasons to visit outside of peak times (eg summer) and at different times of the day and week than traditionally experienced (eg supporting growth of the night time economy). A growth in cultural and heritage tourism on the Central Coast can be achieved by positioning heritage at the forefront of innovative, creative and contemporary heritage interpretation and public art, including graphics, multisensory media, pop ups, digital media, soundscapes, light installations and tactile installations. Key outcomes of heritage tourism include job creation, a sense of place and pride, repositioning of town centres as destinations, and the revitalisation of urban places and civic locations.

Educational Eco Hub and Indigenous Experience at Terilbah Reserve, The Entrance North

This concept is focussed on creating a reason to visit and drawing in new visitor markets to the Central Coast as interest in ‘eco-travel’ trends continues to grow. It includes four components around an educational research centre and tourism attraction, interpretative experience on the region’s indigenous heritage, an innovative viewing tower and soft adventure activations such as kayaking and connection to shared pathway. It directly links to many of the region’s other existing experiences and could capture the growing demand for education based holidaying, as well as fill mid-week visitation through schools. Investment of around \$4-5 million has the potential to capture a share of a market worth \$414 million in the Sydney surrounds north region.

Open Spaces

While the region currently offers a great range of outdoor activities and opportunities to explore nature, it lacks larger, signature experiences and attractions. Several longer-term, ambitious projects have been proposed to fill this gap in our destination offering, such as a Wave Park and Floating Leisure Precinct. In addition, there are few smaller, shorter-term initiatives available that highlight the best that the nature of the region has to offer, continuing to activate our great outdoors for both visitors and residents, and highlighting our natural beauty.



Smaller, shorter-term initiatives nature-based attractions and experiences:

- Bikes, Trails and Pathway Infrastructure
- Waterways activations, both along our waterfrontage and on Brisbane Waters
- Walkways and Trails with added arts and culture, heritage value

Longer-term, ambitious projects:

Floating Leisure Precinct at Tuggerah Lake with connecting Shared Pathway

Tuggerah Lakes are a great tourism asset, currently with limited activations. This ambitious proposal with a floating café, event stage and walkway provides a relatively high balance of risk and reward, whether the initiative is private or public-sector led. Most importantly any feasibility must be conducted with protecting the environment as paramount importance. Investment of around \$10-12 million has the potential to capture a market of around \$33.5 million over five years.

Soft Adventure Cluster - Simulated Wave Park / National Surfing Reserve / Mountain Biking trails upgrade

The emergence of Wave Park technology delivering simulated open surf conditions, but in safe and controlled environments is a new tourism experience gradually becoming available in more places around the world. This concept clusters this with additional soft adventure activities, tapping into one of the existing identifiers for the Central Coast. These are upgrading suitable mountain

biking trails, recognition of Central Coast's beaches as a National Surfing Reserve and development of a new standout, large scale soft adventure tourism experience – such as a Simulated Wave Park. Investment of around \$20 million could have the impact of capturing one per cent additional market share in this soft adventure segment, with the potential to generate over \$213 million in visitor expenditure within five years.

Accessible Tourism Activation Strategic Initiative

There is a growing demand for accessible and inclusive tourism experiences across the globe. While a formal project or investment opportunity has not been identified during this project, the scale of market potential is evident and it is recommended that Council pursue concepts in this area as a medium priority. As costing is site specific, further investigation is required into this opportunity, once a proposed site is selected by Council.

An abridged case study, specifically the 'Food and Beverage Exploration Trail' can be found in the Appendix of this document, it has been included in order to provide an example of how a case study can be developed for each of the potential investment opportunities.

Create Raving Fans and Brand Ambassadors

Photograph: Sarah Kate

Delivery Model

While recognising Central Coast Council's leadership role for this TOP, the delivery model relies on the actions of key stakeholders, partnerships and planning priority actions across some key thematic areas.

Effective partnerships are essential in leading to activation and investment to deliver experiences that complement and add value to current Central Coast landscapes, precincts and existing tourism experiences. Plus foster those experiences that are not yet fully formed, but contribute to the region's unique positioning.

The role of key stakeholders are outlined in the below table:

Central Coast Council (CCC)	<ul style="list-style-type: none"> • Lead the collective ownership and delivery of the Plan • Advocacy for tourism infrastructure and funding • Value tourism impacts in decision marketing • Deliver on the CCDMP • Maintain Council owned infrastructure in line with visitor expectations • Share the story with the local community and equip them to be ambassadors
Tourism Industry Businesses (TIB)	<ul style="list-style-type: none"> • Commit to, and participate in the Strategic Plan • Advocacy for funding and improvements • Collaborate with each other • Invest for change • Delight the visitor
Tourism Advisory Committee	<ul style="list-style-type: none"> • Knowledge, expertise and insights • Steer the sector to address challenges and opportunities • Guidance on regional collaborations • Advocacy for tourism outcomes
Regional Stakeholders, Business Chambers and Other Networks	<ul style="list-style-type: none"> • Advocacy for tourism outcomes • Exchange information with members and other stakeholders • Initiate and facilitate collaborations
Destination New South Wales and Destination Networks (DNSW)	<ul style="list-style-type: none"> • Deliver on NSW Visitor Economy and associated strategies including maximising regional visitor growth • Be industry research and insights leaders • Connect tourism businesses with business support programs
Other State Government Departments	<ul style="list-style-type: none"> • Influence on important issues for tourism: investment attraction; skills shortage and training; transport connectivity; environmental stewardship



Our Priority Actions:

Focus	Action	Timeframe	Who
Destination Marketing	Strategy with a coherent narrative that inspires and provides compelling reasons to visit	Immediate	CCC DNSW
Leadership and capacity building	Foster service excellence and skills growth for tourism businesses to help themselves with create their own opportunities for collaboration Use the destination positioning and experience offer of the Central Coast to contribute to the revitalisation of town centres	Immediate	CCC
Strategic Partnerships	Seek our share of visibility and increased investment by Destination New South Wales in the Central Coast Be an active partner in the Gosford City transformation	Short to Long Term	CCC DNSW TIB
Culture and Heritage	Amplify our cultural products and makers and creators to add vibrancy to the region	Mid to Long Term	CCC
Experience development	Further investigation of new ambitious initiatives and other experiences to prioritise and stage next steps, including feasibility studies, business cases and investment models	Short to Long Term	CCC DSSN TIB
Investment	Influence stakeholders and create incentives to attract the right kind of investment in the Central Coast	Mid to Long Term	CCC DNS TIB
Enabling the enablers	Reflect the vision and direction in Council's planning, policies, processes and decision-making	Mid to Long Term	CCC
Town Centres	Enable and facilitate Town Centre Activation Plan	Short to Long Term	CCC
Hinterland Strategy	Create a strategic plan to enable the development of tourism, including accommodation and attractions, in natural, rural areas	Mid to Long Term	CCC
RV Tourism	Conduct feasibility study and begin exploration of how and where the region could benefit from the emerging trend of RV Tourism among the 50+ existing target market	Mid to Long Term	CCC



Activating food
and wine activities
and experiences

Photograph: Kendell Marganovic

Appendix

Development of a Food and Beverage Exploration Trail - an approach

Activating food and wine activities and experiences in the region through the creation of a Food and Beverage Exploration Trail. This would also involve capacity building with local producers and farm door operators to further enhance the appeal of behind the scenes tours and cellar door tasting experiences.

1. Identification of a food and beverage exploration trail and drive route with supporting marketing plan, including the development of a smartphone based wayfinding app;

On initial investigation, it was found that Central Coast has several local craft food and beverage providers dotted throughout the coast that provide visitors with the opportunity to sample local produce, "meet the maker" and learn about the production techniques.

2. A review of local government policy and regulations around tastings, farm door sales and development approval for commercial infrastructure (e.g. bar and restaurant development, live music and RSA) to assist in fostering the organics growth of this market;

Through undertaking a full cellar door / agritourism product audit including targeted community and industry stakeholder engagement, Central Coast can define key areas to be improved to enable additional growth in this market. This may relate to assistance in permit applications, live music licences and DA approval for Farm/Cellar Door infrastructure. While it was outside the scope of this project to conduct a full stakeholder engagement of this sector, a desktop gap analysis has revealed a significant lack of agritourism business when compare to LGA areas such as Port Macquarie, Hunter Valley and Mid-North Coast.

3. Development and execution of a Council sponsored capability building/mentoring program for local agritourism operators and craft food and beverage producers.

The program should have a focus on experience development and education in accessing grant/funding, small business support services and updates on regulations and policies relevant to the industry. Masterclasses in being international ready and social media are also valuable opportunities for small to medium business owners looking to leverage additional tourism industry revenue streams for their business.

Enablers and Implementation Considerations

- Confirm in-principal support for the concept from Council
- Identify resources for a full business plan covering business case, budget allocation, project design and costings. The plan should also cover;
 - o An audit of existing operators
 - o Stakeholder engagement and partnership development.
- Investigate grant support from sources such as the Building Better Regions Fund to contribute to the cost of local tourism operator capability building mentoring program.

The above is an abridged case study to provide an example of how an investment opportunity is further refined and established as a potential project to be undertaken within the region.

Full case studies for each investment opportunity outlined can be found in a separate document *Tourism Opportunities – Preliminary Analysis*. These completed case studies included investigation the opportunity's problems and challenges, supporting opportunities, potential locations, any design detail, implications for the destination, governance and business modelling, partnerships, likely target markets, potential economic impact, estimated development costs, risk appraisals, and a recommendation.



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