



**Central Coast Plateau  
Tourism Plan**

**October 2006**

**Calais Consultants**

# Central Coast Plateau

## Tourism Plan

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New South Wales  
Department of State and Regional Development



**This study was supported by the Department of State and Regional Development**

## **Executive Summary**

Central Coast Plateau Inc. commissioned the tourism plan with funding support provided by the Department of State and Regional Development, Gosford City Council and the Mangrove Mountain Memorial Club.

The goal of the project was to ascertain the tourism potential of the Central Coast Plateau.

The methodology adopted involved establishing database of all tourism related products, research on tourism trends, site inspections and discussions with operators and key stakeholders and the conduct of a community workshop to discuss the opportunities and determine the level of support for tourism in this area.

The research highlight that there were over 100 tourism products in this area and that it housed two of Australia's best known tourist attractions. There are a number of quality world class nurseries also in this area. In terms of tourism accommodation (non dormitory) it is estimated that there are less than 40 rooms available. This is an issue for the future growth of tourism in this region. The area suffers from a low level of awareness in the marketplace due to a lack of marketing. This lack of marketing is related to fact that small accommodation operators have limited funds for marketing. The area also lacks a sense of place.

On the positive side the area has a number of differential strengths. These include its rural, agricultural and natural landscapes, equestrian facilities, reputation for fine products – citrus, flowers, fresh produce, spring water etc, clean air and its strategic location between Sydney and the Hunter Valley. It is apparent that there is strong community support for an environmentally sustainable and a viable tourism industry on the Plateau.

The Central Coast Plateau Tourism Plan identifies a strategic direction for tourism development in this area having cognizance of the principle that what is developed must be in harmony with the areas natural and cultural values and be inclusive of the communities' needs as well. It outlines 6 strategies and 28 actions which will assist in the development of the tourism industry in the Plateau. These actions are to be implemented over the next 5 years.

Some of the key recommendations include the establishment of a tourism precinct in the Peats Ridge area to showcase the best the area has to offer in terms of arts, crafts, and produce as well as being a cultural and social meeting place for the community; additional tourism accommodation; improved signage; visitor maps; a new Central Coast Plateau Brand which is embraced and adopted by all the key industry sectors in the area and greater collaboration between all levels of Government, industry, investors, operators and community members to achieve this vision.

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# 1. Introduction

## 1.1 Background to study

In 2003 two community-planning workshops were held for local community and business members of the Central Coast Plateau and its surrounding districts. Over 220 people attended with wide representation from various government departments and industry groups lending their support.

The purpose of the workshops was for the attendees to collectively identify their vision for the future, address local issues and plan for the future. Topics of discussion included business development, tourism and environmental sustainability. All suggestions, ideas and actions derived from the workshops has been compiled into a document known as the '*Mangrove Mountain & Districts Community Strategic Plan*'. September 2003.

During the workshops the attendees acknowledged the potential to develop tourism due to the area's assets including close proximity to Sydney and Gosford, tourism route from Sydney to the Hunter Valley, its natural beauty and attractions and its potential to allow visitors to experience and observe aspects of rural life.

Since the workshops, a Tourism Action Group was established and has been responsible for implementing the actions contained in the community plan relating to tourism. At the inaugural meeting of the Tourism Action Group it was decided that due to the complexities of the tourism industry, an experienced tourism consultant was needed to identify new product development opportunities and the enhancement of existing tourism experiences.

An application was lodged with the Department of State and Regional Development under the Towns and Villages Futures Program to secure funding for the tourism consultant, which was successful. Additional funding was received from Gosford City Council and the Mangrove Mountain Memorial Club.

## **1.2 Study Objectives**

1. Undertake an audit of tourism products in Mangrove Mountain and surrounding districts.
2. Obtain an understanding of visitor trends to this area
3. Identify opportunities to enhance existing tourism products and experiences as well as the development of new environmentally sustainable products.
4. Provide a written report on the findings including recommendations of product development, required resources and a detailed action implementation plan

## **1.3 Study Area**

The study area is generally known as Mangrove Mountain and is regarded as the hinterland of Central Coast. The study area encompasses Mt White to the south, Kulnura to the north, Somersby to the east and Spencer to the west. The area is basically dissected by Peats Ridge Road – George Downes Drive (Tourist Drive 33) and Wisemans Ferry Road.

For the purposes of this study, the study area is named “The Central Coast Plateau”

## **1.4 Study Methodology**

The approach adopted by the consultants involved the following:

- Compilation of a database of all tourism products in the study area – See Appendix 1
- A number of site inspections and interviews were conducted over 3 field trips. In all 15 interviews and 18 product inspections were undertaken. These interviews gave an insight to issues impacting the current operations of the tourism industry and community attitudes towards this industry and other issues of concern within the Central Coast Plateau.- See Appendix 2
- Meetings were also held with Gosford City Council, Central Coast Tourism, and Tourism New South Wales.

- Desk Research on tourism trends and visitation and previous studies of the area.
- A community workshop held on the 13 June 2006 with over 40 people in attendance. The input from the community representatives has been incorporated in this report. The workshop objectives included:
  - Identify the area's tourism resources and appeal
  - Sharing the latest market research on tourists and what tourists are seeking
  - Assessing the area's capacity and challenges to provide for the visitor needs
  - Identifying an acceptable tourism image for the Central Coast Plateau.
- Review of the draft Central Coast planning Strategy released by Planning NSW in the context of the tourism future of the Central Coast Plateau.

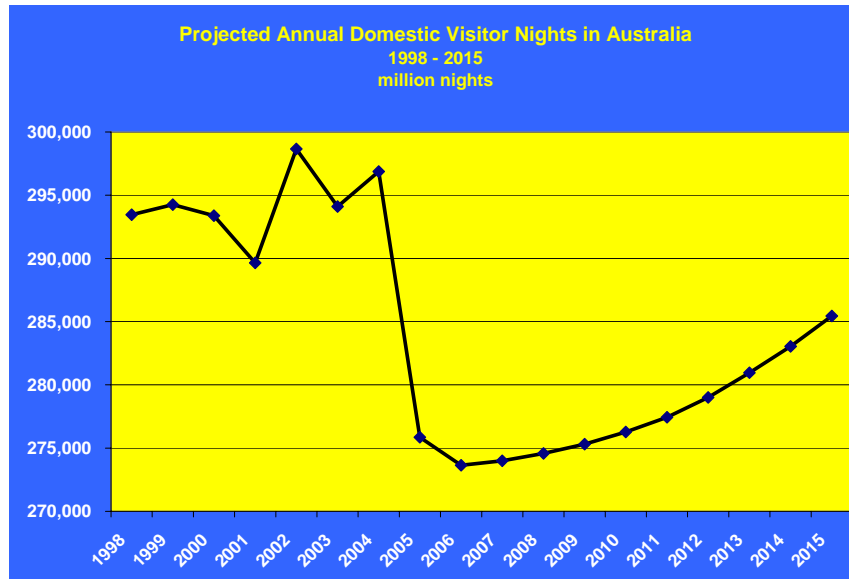
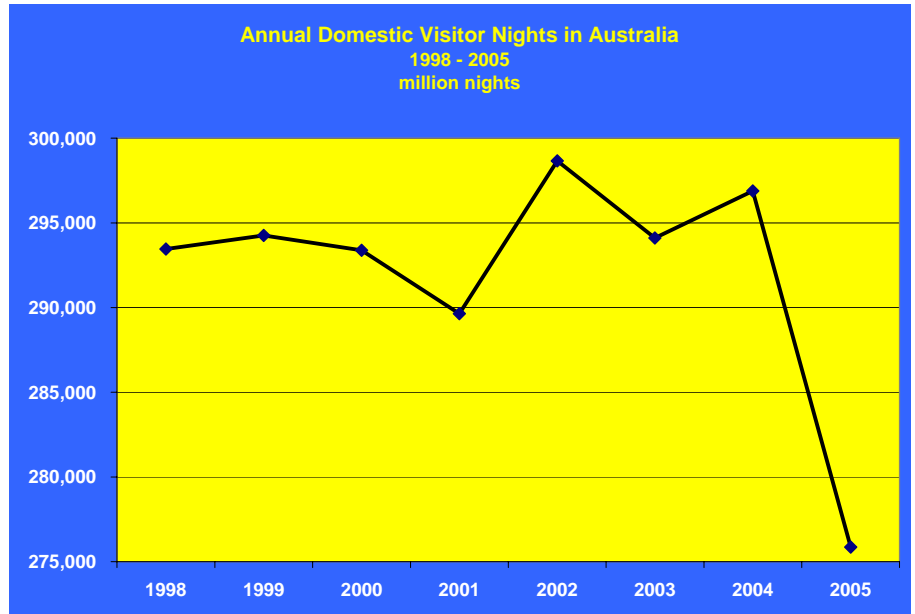
The consultant wishes to acknowledge the assistance and cooperation he received from Sue Verhoek, Strategic Projects Officer for the Central Coast Plateau, Gosford City Council and Beverley Ferrier, Chairperson of Central Coast Plateau Inc in the preparation of the products database, organization of the field visits and the community workshop.

## 2. Issues for Consideration

### National Tourism Trends

Domestic tourism reached a high point in 2002 with close to 300 million visitor nights. Domestic tourism then declined in 2003, rebounded slightly in 2004, and then fell precipitously in 2005 to just under 276 million nights. This was a 7.1 percent decrease over 2004.

The Tourism Forecasting Committee (TFC) is an Australian Government body associated with Tourism Australia. It is the successor agency to the Tourism Forecasting Council. The TFC provides projections of tourism activity for Australia and has forecast that domestic visitor nights will continue to decline in



2006 to about 273.6 million nights.

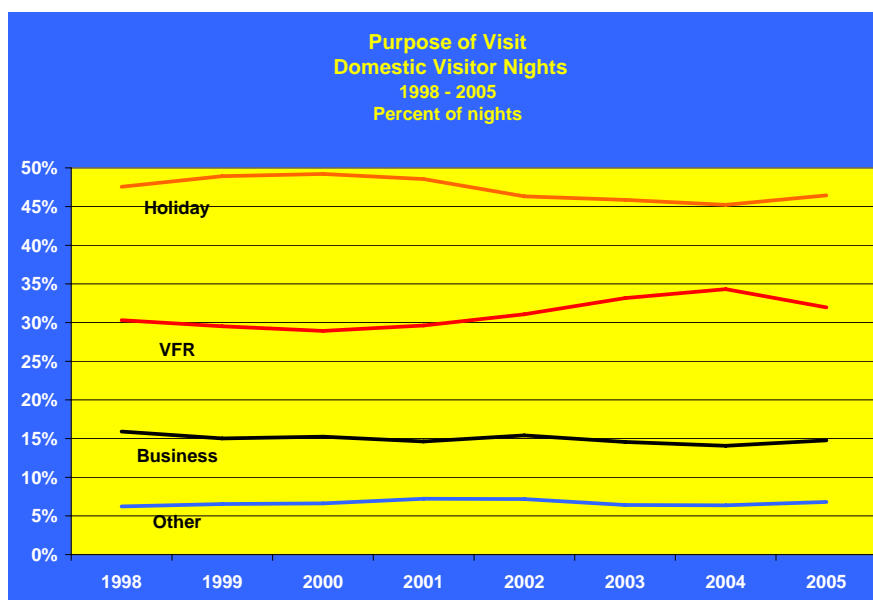
The forecast then anticipates that domestic tourism will grow marginally with visitor nights only reaching the level of 2005 by 2010. It is then expected that the growth rate will accelerate to an average of

2.5 percent per year through 2015. It is projected that the number of visitor nights in 2015 will still be 14 million less than in 2002.

Possible reasons for this recent decline and projected low growth in the future include:

Factors contributing to the decline in overall domestic (interstate and intrastate) travel both nationally and regionally include:

- An appreciating Australian dollar and increasing price competitiveness of foreign destinations compared to domestic destinations with Australians switching from domestic travel to international travel;
- Low cost airlines, in particular Jetstar and also Virgin Blue. The last year has seen ongoing reductions in the price of airfares and increased air access and seat capacity to capital cities and regions with established or developing holiday product. Discount airfares on the eastern seaboard have meant many interstate holiday makers might have been able to travel further afield than they might had otherwise done so and in particular to Queensland
- The lower airfare cost has also extended to the outbound market with many destinations such as New Zealand, Fiji, and Southeast Asia an affordable alternative to domestic travel
- The continuingly increasing price of petrol coupled with discount airfares has acting as a discouragement to driving holidays and long touring holidays, making flying to a destination relatively more attractive, particularly for short break holidays and VFR travel
- Economic and social factors, such as higher levels of personal and household debt; increased spending on communication, technology, renovations, furnishings, household goods and health have all taken their toll on the leisure spend.
- Busier and changing lifestyles (culture of not taking leave, increase in the uptake of technology/lifestyle leisure alternatives to holidays).
- Changes to the labour market, in particular the casualisation of the labour force, high female participation rates, long working hours and fear of losing jobs. Change in legislation has created fear in relation to security.



In New South Wales the decline in domestic tourism has been even more pronounced. With the exception of 2002, there has been a steady decline since 1998. From 1998 to 2005 the decline was over 13 percent. During the same period Victoria declined 8.3 percent and Queensland increased by 7.5 percent.

The economic value of domestic tourism peaked in 2000 at \$61.2 billion. This has steadily declined to \$55.7 billion in 2005. Even though total visitor nights are expected to decline in 2006, the Committee has forecast that economic value will increase in 2006 and subsequent years. From 2005 to 2009 it is forecast to grow by an average of 4.7 percent per year and by 6.8 percent per year from 2010 to 2015. By 2015 economic value is projected to be \$63.8 billion.

Another significant change has been in the reason for travel. From 2001 to 2004 the proportion of visitor nights spent visiting friends and relatives had increased from 30 percent to 34 percent of all nights. Over the same period the proportion of total nights spent on holiday and leisure declined from 49 percent to 45 percent. In 2005 there was a slight decline in the percentage visiting friends and relatives and a slight increase in those on holiday and leisure purposes.

For the period June 2001 through June 2004 there have been significant changes in the domestic holiday market segments. Over this period the following changes have occurred

- Singles market down by 22 percent
- Double Income No Kids (DINKS) market down by 9 percent
- Older working married couples up by 5 percent

- Parents travelling with children under 6 years up by 12 percent
- Parents travelling with children over 6 years up by 4 percent
- Older working singles up by 12 percent

Even the source of domestic holiday travellers has changed significantly over this period. The number of holiday travellers residing in the major capital cities on the East Coast of Australia has declined whereas regional and non metropolitan residents have had a higher propensity to travel to domestic destinations for holidays. For the period 2000- 2004 the following changes occurred.

- The number of Melbourne residents travelling declined by 10 percent
- The number of Sydney residents travelling declined by 11 percent
- The number of Brisbane residents travelling declined by 4 percent
- The number of other Australian residents (non – metro) travelling increased by 5 percent

However one section of the tourism industry which appears to maintaining its market share is that of the caravan and camping sector. Since 2001 the number of visitor nights spent by travellers who stay in caravan parks has increase from 40.8 million to 41.0 million in 2004. The TRA predicts that the number of visitor nights spent by senior travellers will increase from 15.7 million nights in 2003/04 to 19.9 million nights in 2011.

For those who do drive, the higher prices for petrol and accommodation in recent years have caused a trend toward trips that are of shorter duration, but involve higher expenditure per day. This trend toward shorter, but higher yielding trips is expected to continue over the medium term.

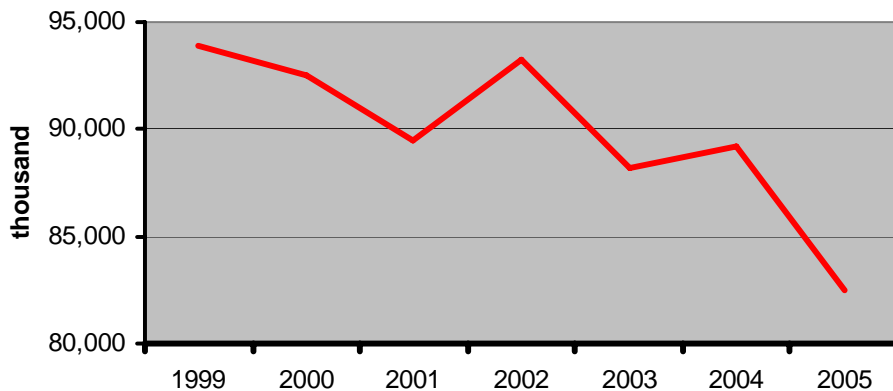
The net impact of the above trends has been – fewer and shorter trips with less spend per trip.

## 2.2 New South Wales Tourism Trends

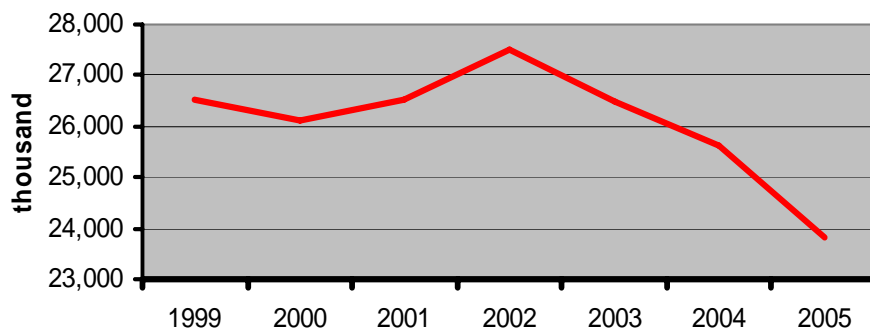
Domestic visitation in New South Wales has experienced a steady decline since 2002 when levels peaked at 27.5 million trips. For the year ended 2005, total domestic visits within the state were 23.8 million, a 13.4 percent decline over the three year period, and a 7 percent decline over 2004.

Total visitor nights also peaked in 2002 at 93.3 million. Over the three years to the end of 2005, total domestic visitor nights declined by 11.6 percent to 82.45 million nights. There was a 7.5 percent drop from 2004 to 2005.

**Visitor Nights to New South Wales  
1999 - 2005**



**Overnight Trips to New South Wales  
1999 - 2005**

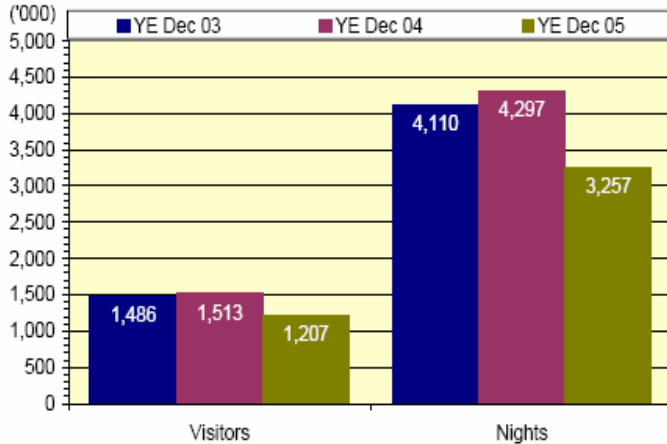


## 2.3 Central Coast Visitation

### Overnight Visitors

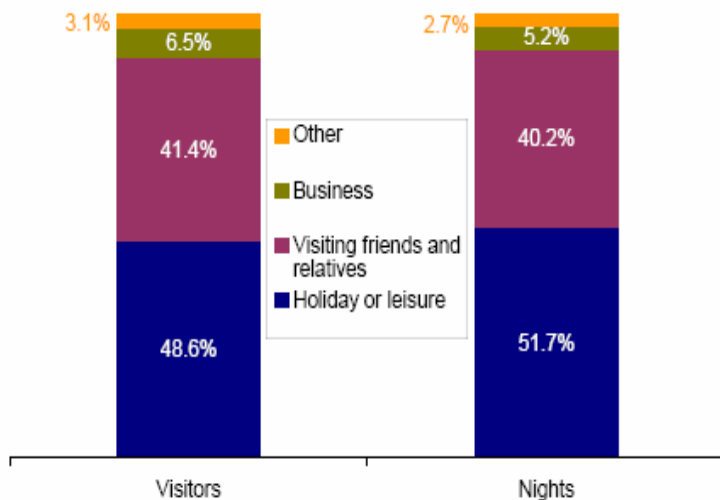
To place into context the value of tourism in the Gosford and Wyong Local Government Areas the following visitor statistics are presented. The data is provided by Tourism Research Australia and Tourism New South Wales and is based on the National Visitor Survey year end December 2006.

#### Visitors and nights



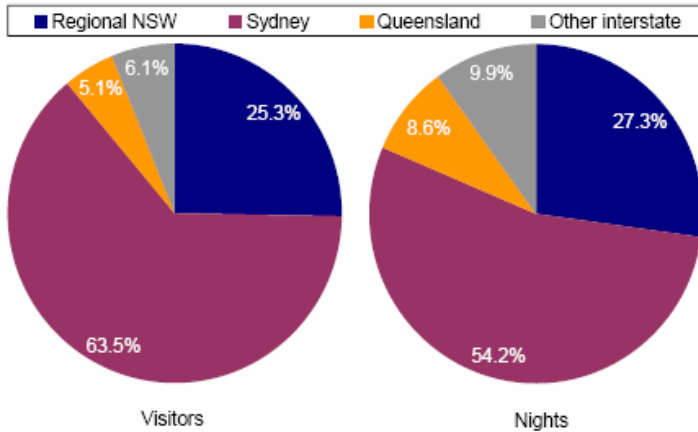
The Central Coast region received 1.2 million overnight visitors to the region in 2005, a decrease of 30% over 2004. The number of visitor nights in the region also experienced a decline of 24% from 2004.

#### Purpose of visit



The primary reason for visiting the Central Coast is for holidays (48.6%) followed by visiting friends and relatives (41.4%). The visiting friends and relatives segment will only increase with the Central Coast more and more becoming a residential dormitory for Sydney. The challenge from a tourism perspective is to build new accommodation products and attractions to attract visitors who will bring “new money” into the local area economy.

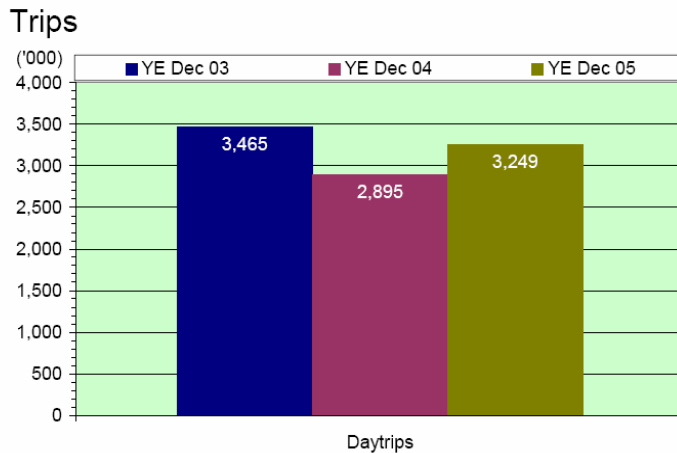
## Origin



The primary source markets for visitors to this region are metropolitan Sydney followed by regional New South Wales. This appears to be consistent with the anecdotal evidence of tourism operations on the Plateau.

## Day Trip Visitors

### Domestic Daytrip Travel To Central Coast



While the level of overnight visitors declined over the past 12 months, the number of day visitors to the Central Coast Region increased by 12.2 % on year end December 2004. This region received 3,249,000 daytrips in 2005.

Activities undertaken by day-trippers include visiting friends and relatives (44.2%) eating at restaurants (35.8%) followed by "go to the beach/swimming" (27.3%) and general sight seeing (16.5%).

36.1% of day-trippers were aged below 35 years, 36.1% aged 35-54, while 28.4% were aged 55 years and above.

In the year ending Dec 2004, a report prepared by Tourism Research Australia suggested that day trippers in Australian regions spent on average \$58 per trip.

Based on this expenditure level, the economic contribution by day trippers to the Central Coast Region is estimated to be approximately \$188 Million.

## **2.4 Central Coast Plateau Visitation**

There are no visitor statistics available for the Central Coast Plateau. A number of individual tourism operators maintain their own database of visitors and these are not available for publication. In our discussions with operators, it is apparent that the visitor types who generally frequent the Central Coast Plateau include:

- Day visitors at specific attractions
- Day trippers – cars, bikies, cyclists and coach based travellers.
- Drive through visitors on their way to or from the Hunter Valley along Tourist Drive 33.
- Special interest visitors to world class agricultural enterprises located in the area
- Overnight visitors to individual accommodation properties
- Visiting Friends and Relatives

It is evident that the majority of visitors are those driving through to the Hunter Valley and day trippers. It is suggested that 95% of all visitors would be domestic markets and about 5% overseas travellers. Anecdotal evidence from operators on the Plateau suggests that the primary visitor markets would be Sydney and Gosford and Newcastle.

In the context of international markets, the attractions sector – The Australian Reptile Park, Glenworth Valley and the Australia Walkabout Wildlife Park are the primary attractors of the international visitors to the area. Most of these visitors are attraction specific and spend little or no time on the Plateau.

## **2.5 Central Coast Plateau Tourism Products**

With the assistance of Sue Verhoek, Strategic Projects Officer, Gosford City Council and Beverley Ferrier, Chairperson of Central Coast Plateau Inc. a comprehensive database of tourism products on the Central Coast Plateau was prepared. See Appendix 1.

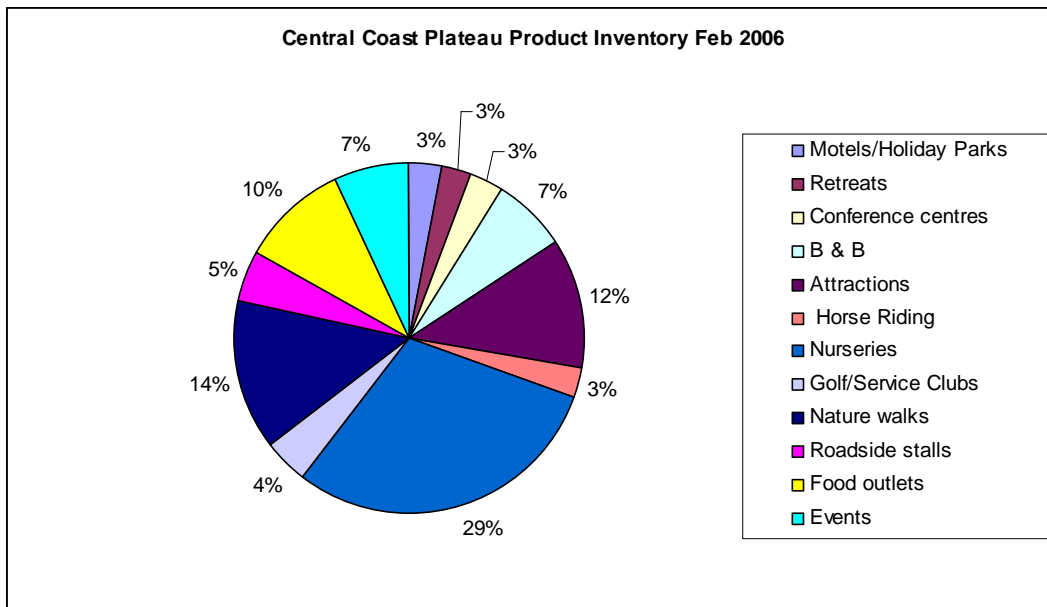
In all there are 101 tourism products as at February 2006.

In terms of tourist accommodation, it is estimated that in the Central Coast Plateau there are 38 guests' bedrooms in 9 establishments - cottages (self contained and B&BS) and motels. The area also has 3 religious and church based retreats with approximately 250 beds dormitory style in this area.

There are 11 attractions ranging from one of Australia's most outstanding reptile parks to pin ball skirmishes to historical attractions and the Mt Penang Gardens.

The area has a good reputation for horse riding opportunities and horse adjustment and caring. Glenworth Valley has an excellent international clientele and reputation.

The biggest product group is the nurseries with over 30 establishments. Many of the nurseries are also world class establishments such the Wildflower Farm, Royale Orchids and many more. Some are open to the public 7 days a week but many are wholesale nurseries and only accessible by appointments. This area has a reputation for fresh farm produce and has about 5 roadside stalls. Unfortunately, only Nanny’s Fruitbox is opened 7 days a week.



The area has a limited number of quality food and beverage establishments which are opened 7 days a week. Exceptions being the Villa Sorgenti, Corrugated Café and the restaurants in the two service clubs. Others are opened over the weekends periods – Thursday to Sunday or are mainly takeaways.

## 2.6 Strategic Issues arising from the Field Trips

The Central Coast Plateau has a number of qualities and attributes including

- Nurseries, citrus, fresh produce
- Nature – peace, tranquility
- Space/green – activities, sustainability
- People – arts, crafts, community working together
- Alternative access to Hunter and proximity to Sydney/Central Coast

The field trips and discussion with operators highlighted some additional issues which need to be considered if this area is keen to establish itself as a tourist destination.

### Place Management

- Signage improvement within the study area
- A lack of a sense of arrival.
- Need to develop a sense of place- currently there area number of neighborhood meeting places scattered through the region- mainly for the benefit of the local community – Mangrove Mountain, Peats Ridge, Kulnara. Opportunity exists to develop a higher level of commercial activity at one of these places.
- Lack of Public amenities – toilets, BBQs.
- Development of a theme which unites the area. This can take the form of signage and/or landscaping

### Product Development

- Need for additional experiences to showcase the areas arts and crafts – similar to the Slab Furniture outlet. It is understood that there are a number of very talented artists and craft persons living in this area.
- Potential to value add existing commercial activities such as nurseries. International and national trends highlight a significant growing consumer interests in landscaping, nurseries and gardens.
- The potential to value add the areas reputation as a source of fresh produce for Sydney. Best achieved by encouraging professionally operated stalls similar to Nanny's Fruitbox.

### Service Delivery

- More professionalism in the delivery of the visitor experience. Given the scale of the industry, it is imperative that the service levels of all business meet the expectations of visitors. Poor service levels in any single

business will have follow on negative impact on the reputation of the whole area.

### **Environment Management and Planning**

- Balance between resource extraction activities – sand and water and environmental sustainability and incorporation of new sustainable tourism opportunities as local employment drivers.
- The need to review Gosford City Council planning regulations with respect to establishing viable tourism business. While the planning framework allows for tourism development in selected areas, they hinder the viability of business by limiting the scope and scale of activities. There is an opportunity to review these while at the same time maintaining the landscape amenity and environmental values of the area.
- Need to maintain existing ambience of the area and limit large scale development of residential suburbs as is happening on the eastern side of the F3.

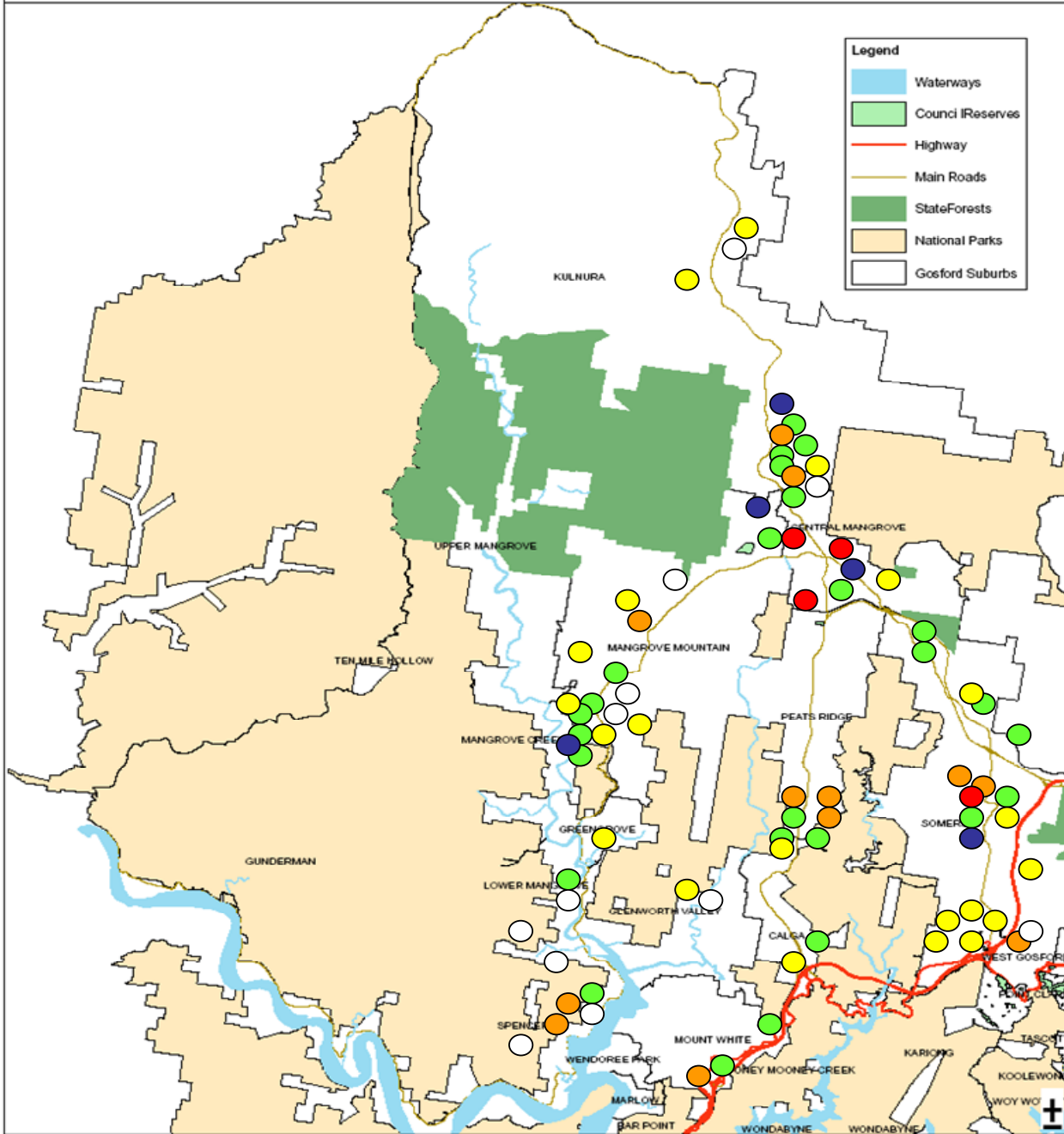
### **Marketing**

- Limited marketing of this area. The Central Coast Visitor Guide, being membership driven, has very limited editorial on this area.
- Lack of cross promotion of existing products in the area.
- Visitor information services lacking
- Strategic alliances with surrounding destinations such as Hunter Valley and the Hawkesbury Heartland
- Marketing- establishment of a brand and greater involvement by Central Coast Tourism in the promotion this area.

## **2.7 Location Map of Tourism Products**

The attached map gives a good helicopter view of the locations of the various tourism products and tourism related products identified under the different product categories. It is noted that there may be some error in the actual location of products. This analysis merely provides an overview of the spatial distribution of tourism products on the Central Coast Plateau.

# Location Map of Tourism Products on the Central Coast Plateau



SCALE 1:120,000

Date: 00.00.2006  
 Source: Gosford City Council  
 Projection: GDA\_1994\_Transverse\_Mercator; GCS\_GDA\_1994  
 Created in ArcGIS 9 using ArcMap  
 Environ on 'Nike' P:\Natural\_Resources\_GIS\data\project\

USERNAME

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- - Place of interest
- - Accommodation
- - Fresh produce stall
- - Café/Food/Petrol
- - Nurseries
- - Golf/Service club

The map highlights the following issues

- Only one tourist accommodation along Tourists Drive 33 - Peats Ridge Rd and George Downes Drive. Others are scattered away from the main thoroughfare to the Hunter Valley and region.
- Food outlets are mainly located at the Village nodes - Peats Ridge Mangrove Mt, Kulnara and Somersby
- The biggest tourists attraction node is in the vicinity of the F3.
- Nurseries well represented along Peats Ridge Rd and George Downes Drive
- Road side stalls also mainly located along Peats Ridge Rd and George Downes Drive.
- While the area has vast acreages of National Parks there is limited access for day visitors or tourists to the area.

## **2.8 Competitors**

In considering the tourist potential of the Central Coast it would be prudent to consider areas within the Sydney /Gosford catchments which potentially are competitors to the Central Coast Plateau. On one hand these destinations may be competitors but on the other hand they also provide the Central Coast Plateau area performance benchmarks in terms of service delivery, product presentation, visitor experience and marketing.

These include – Hawkesbury Heartlands, Southern Highlands and Central Coast – east of the F3.

### **Hawkesbury Heartland (Wiseman’s Ferry – St Albans)**

The local tourism precinct/area brands itself as the Hawkesbury Heartland, (although it is understood that they are rebranding themselves as Wiseman’s Ferry ~ St Albans). The area covers the Lower Portland, Wiseman’s Ferry, and St Albans.

In this area, there are 22 accommodation outlets in addition there are 9 dining outlets and there are 5 water-ski/water sports camps along the river.

The majority of accommodation is B & B and self contained cottages.

There are two hotels and 2 houseboat operators. The only large land based accommodation operators in this area include The Retreat at Wiseman’s and Del Rio Resort. The Retreat at Wiseman’s has 54 rooms plus a few suites with spas and focus on its health, restaurant and golf packages. It also caters for high end conference groups. Del Rio has 36 cabins with 74 rooms and 110 caravan and camping sites. It has plans to double the number of cabins in the near future. St Albans is a historical Village and has a well known Settlers Arms Inn, which attracts hundreds of visitor over the weekend. The area boasts some quality art galleries and craft shops. This area is also part of the Hawkesbury Harvest Trail

project. This project has received a significant level of funding from both the Federal and State Governments and features the sale of fresh food and fruit/vegetable and farm produce from the area directly to the consumer.

### **Southern Highlands**

The Southern Highlands region encompasses the area to the southwest of Sydney. The Southern Highlands stretches inland from the Illawarra incorporating Bowral, Mittagong, Moss Vale, Berrima, Robertson and Bundanoon. There is easy access to the region from Sydney along the Hume Highway through the Southern Highlands and the Princes Highway through the Illawarra. Access has significantly improved with the completion of the M5 and M7 motorways providing expressway access from the CBD and most regions of Sydney. Visitors are attracted to the area because of the sophisticated country experience - the fresh air, the tranquillity, the array of trees and beautiful gardens. The Highlands offer the picturesque countryside as well as mountain ranges, impressive limestone caves and cascading waterfalls. There is a wide selection of accommodation – quaint, charming, contemporary, fashionable, guesthouses, English manors and large country estates. There are also historic villages, excellent shopping and restaurants to suit a range of diners, as well as entertainment for all. The Southern Highlands region has a limited number of attractions. The dominant category of attractions is nature based followed by museums and historic sites, galleries and craft centres. The region also hosts numerous festivals and special events. The most well know are Sea, Food and Sail, Australian Folk Festival, Shakespeare Festival Australia and Florawarra.

### **Central Coast (west of F3)**

The Central Coast is a relatively small region encompassing the area north of Sydney including Gosford, Wyong, and Terrigal. The Central Coast has extensive beaches, natural bushland, national parklands and large inland waterways. Activities include scuba diving, sailing, kayaking, and abseiling, bushwalking, and 4WD tours. The area has excellent access from Sydney on the Pacific Highway. The Sydney CBD is approximately a one to one and one-half hour drive from the Central Coast. The dominant categories of attractions in the Central Coast are the beaches and water related activities. The region also hosts numerous festivals and special events. The most well know are Australian Springtime Floral Festival, and the Terrigal Beach Food and Wine Festival. It is noted that over the recent years the level of residential growth of this region has increased significantly. It has become a dormitory suburb of Sydney.

## 2.9 Implications for Central Coast Plateau Tourism

The above tourism data, trends product analysis and competitor analysis suggest that while drive tourism is on the decline around Australia and New South Wales, the locational attributes of Central Coast Plateau – closeness to Sydney and proximity to the fastest growing population catchments in Sydney and Gosford - provides positive opportunities to increase the visitation to this area.

In terms of critical mass, accommodation appears to be an issue. The largest volumes of beds are in a dormitory style accommodation located in church and religious retreats. These establishments attract visitors who come to the camps for specific programs and depart immediately thereafter. Their guests generally do not interact with the tourist products in the area. These are point to point visitors. On the other hand, visitors to most of the B & Bs and cottages wish to experience local attractions, galleries and eateries. However there are a limited number of these experiences available in the area.

Hence we have a catch 22 situation. On one hand not much for overnight visitors to experience and on the other, not many experiential products which can sustain themselves in business on a 6 day basis because of the lack of visitors. Market research also shows that consumers are more discerning and expect value and service for their holiday dollar and are seeking authentic and quality experiences. In other words, they are prepared to spend if they can find quality and authentic products and experiences.

The Central Coast Plateau has the capacity to deliver these needs for visitors by being innovative in its product development especially in the accommodation and visitor services sectors. New products need to be economically and environmentally sustainable, well designed and leverage the natural attributes of the area. There are a number of planning issues which need to be considered by the Gosford City Council from both the perspective of the community and the tourism industry. There is a need to develop a sense of place for the area and planning policies which give consideration to the development of viable tourism businesses.

This area needs to be marketed as a special destination within the umbrella of the Central Coast Tourism marketing strategy.

There are existing niche product experiences such as nurseries/gardens which can be upgraded attract high yield domestic markets. Additionally, the drive market segments from the United Kingdom, Germany, and United States may also be attracted by the rural and agricultural experiences offered in the Central Coast Plateau. This area could be developed as an attractive a stopover for visitors to the Hunter Valley.

### 3. Market Segment Analysis

#### 3.1 Market segment types

There are a range of consumer profile factors available to understand the market:-

- Demographics (gender, age group) also need to be considered.
- Geographic: (where are your visitors coming from) i.e. Sydney, intrastate (within NSW), interstate (within Australia) or international
- Mindset segments:
  - Pampadours: luxury travellers;
  - True Travellers: adventure travellers;
  - Wanderers: touring travellers;
  - Compatriots: family travellers;
  - Groupies: peer group travellers.

A powerful way of really understanding consumers is to segment them based on their “mindset”, or state of mind. A substantial amount of research has been done for *Tourism Australia and Tourism New South Wales by Colmar Burton Market Research* on mindset segmentation. The analysis of these market segments formed the basis of the community workshop held 13 June 2006. The workshop explored the relationship between market segments and the tourism products and experiences currently available on the Central Coast Plateau.

For the purposes of this report, a summary of the information provided as background to the segmentation has been included in Appendix 2.

It is important to understand that the descriptions of the mindsets should not be taken too literally – they are a guide and the definitions are not black and white

The participants of the 13 June 2006 workshop were divided into the 5 mindset segment groups and were asked to identify top 5-10 “must see/must do” attractions or experiences for each of the consumer segments. In addition they also highlight some product gaps and product development opportunities in the area.

The tables below summarise the feedback received from all the participants at the workshop.

### 3.2 Consumer Segment and Product Experience Analysis

Segment	Must See and must do products/experiences	Product gaps and opportunities
Pampadours	Luxury B & Bs; Golf – Green Hill; Horse riding – personal guided treks Nurseries & Gardens Nature – views, vistas, walks	Quality restaurants Spa facilities Retail outlets Local providers – gourmet food Central tourist facility to sell local produce which can be a community cooperative.

Segment	Must See and must do products/experiences	Product gaps and opportunities
Compatriots	Horse riding Quad bike riding Reptile Park Laser skirmishes Somersby Falls Koolang observatory Mangrove Mt Retreat	Family Friendly eating Pub Self contained family accommodation. Farm stay Arts n Crafts centre. Markets Decent public toilets. Central information for tourists. Tourist signs

Segment	Must See and must do products/experiences	Product gaps and opportunities
Wanderers	Lots of walks – <i>but location not identified</i> Local accommodation – <i>but location not identified</i>	Showcasing farm experiences. Specialist berry farms , Citrus farms, Native flower farm – pick your own Public facilities and amenities at Dubbo Gully, Elisbeth Donovan Park, Richard Woodbury Reserve, Craft Creek Reserve. Local Museum Craft Centre – showing local products – pottery, wood turning Outlet for local fresh produce.

Segment	Must See and must do products/experiences	Product gaps and opportunities
<b>True Travellers</b>	Wild bush animal sanctuary Bush tucker & aboriginal sites. Native plant nurseries Yoga & relaxation	Suitable accommodation – motel or caravan park. Need for a hub with a quality café ,fruit shops and takeaways, crafts

Segment	Must See and must do products/experiences	Product gaps and opportunities
<b>Groupies</b>	Quality accommodation & camping facilities at Mangrove Mt Retreat and Glenworth. Koolang Observatory Australian Walkabout Wildlife Park Glenworth horse riding Reptile Park. Paint ball skirmishes Golf club	Fresh Produce outlets Bush tucker experiences Aboriginal artifacts Marketing identity for the area.

Given the above feedback, the consultant has attempted to find the best market segment fit with the experiences currently on offer. This analysis was based on the consultants understanding of the quality of products relative to the market competition and experience delivered. The ranking for each segment was relative to each of the following themed experiences:

- Nature
- Food and wine
- Water – river, lake and beach
- Arts/culture /history/crafts
- Events
- Accommodation

**Which market segments present the strongest fit with Central Coast Plateau?**

Product/ Experience	Segments	Fit				
		Low				High
Nature based experiences including wildlife parks	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5
Food and wine experience, including fresh produce	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5
Arts/culture/heritage/history experience	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5
Water Based-rivers, falls	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5
Events	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5
Accommodation	Pampadours	1	2	3	4	5
	Compatriots	1	2	3	4	5
	Wanderers	1	2	3	4	5
	True Travellers	1	2	3	4	5
	Groupies	1	2	3	4	5

It would appear that the market segments which are best catered for in terms of experiences on offer and overlay the accommodation available are as following order of priority.

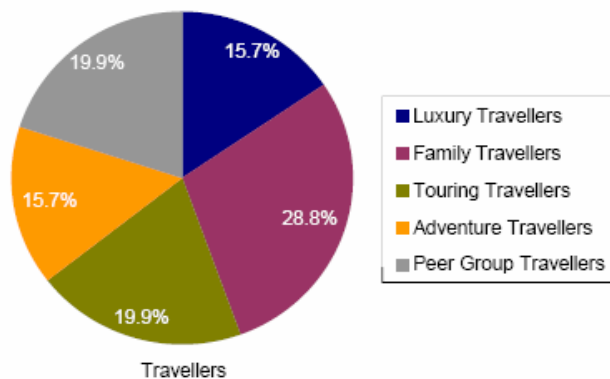
1. Groupies (Peer Groups Travellers))
2. Wanderers (Touring Travellers)
3. Compatriots ( Family Travellers)
4. Pampadours (Luxury Travellers)
5. True Travellers ( Adventure Travellers)

It is interesting to note that while there are many active things to do for the family market – the reality is that accommodation/food outlets suited for this segment are inadequate. Similarly, the Pampadours and true travellers can be catered by 2 quality accommodation operators, but the meals and experiences available are limited.

### Comparison with travel segments to the Central Coast Region.

Tourism New South Wales in their regional tourism fact sheet (2006) suggest that the biggest segment for the Coastal areas is Family followed by Peer Groups and Touring travellers.

Australian travel segments<sup>(1)</sup>



#### **4. Developments Proposed by Private Sector**

In the course of the field trips and discussions with existing operators, it became apparent that there were a number of new infrastructure products which are proposed. The projects will be subject to development applications to the Gosford City Council and the Wyong Council.

- Green Hill Golf Course (formerly known as the Springs Golf Course) –35 accommodation units and a new clubhouse
- Plant Mart – retail nursery outlet
- Villa Sorgenti – Upgrade wedding and meetings venue and rooms
- Ongoing upgrades at Australian Reptile Park
- Glenworth Valley – ecolodge potential I(30 - 40 cabins) and school groups accommodation
- Australia Walkabout Wildlife Park – eco-cabin developments
- Koolang Observatory –additional new radio telescope
- Mangrove Mountain Memorial Golf Club – extensions to golf course
- Restaurant, retail and visitor information centre– “Karingal” Mangrove Mountain
- New Gateway Visitor Information Centre at Kariong
- Extension of the Mangrove Mountain IGA Supermarket and shop

## **5. Draft Central Coast Regional Strategy**

In September 2006, the NSW Planning Department through the Minister of Planning, Hon Frank Sartor MLA, released the draft Central Coast Regional Strategy. The Strategy establishes the framework for a number of significant areas which will impact upon the future development of this region. The areas include

- Residential Development
- Economic and Employment
- Environment Management
- Water management
- Regional Infrastructure and Transport

Unfortunately the Strategy does not give any indication to the future options for the Central Coast Plateau area. It has indicated a policy of not encouraging residential development similar to those in Gosford and Wyong on the Plateau. This is a positive direction which needs to be supported. From a tourism perspective, it would be futile to destroy the natural character and rural landscape of the Plateau.

The Draft Strategy also indicates that it needed to address the issue of the extractive industries – sand, stone and water and timber- environmental sustainability and impact on water catchment etc. This study will be undertaken by the Department of Primary Industry and the Department of Planning and the local councils.

Similarly a Regional Conservation Plan is to be prepared in 2007 - 08 by the Department of Planning and the Local Councils.

It is suggested that that it would be in the interest of the tourism operators in the region to also participate in the above planning exercises. This will be best coordinated by Tourism New South Wales and involve Central Coast Tourism Inc and the selection of local operators.

## 6. Central Coast Plateau Tourism Plan – The Way Forward

### 6.1 Vision

#### Preamble

The Mangrove Mountain and Districts Community Strategic Plan developed in September 2003 had the following Vision Statement:

***“A Progressive, Diverse, Cooperative, Economically Viable Community”***

At the June 2006 workshop, the participants were asked to indicate their expectations and vision for the tourism industry in this area. A range of responses were obtained including:

- Agritourism showcasing local produce and co existing with agricultural business.
- History of plateau
- Support of Gosford City Council for a broader tourism vision
- Separate marketing identity –destination which people come to and not go through. The development of a unified Brand for this area
- Locals working together.
- Sustainable industries
- Sustainable supply of water to underpin farming and rural tourism
- Increase investment in tourism to provide local benefits for the area.
- In 5 years no rezoning – develop within current zones
- Financially viable tourism industry
- Community friendly tourism
- Lifestyle maintained.
- Establish a tourism hub – which can house a number of quality tourist products and a Farmers market. Potential site is Peats Ridge.

Based on the above two inputs the following vision statement is suggested for the tourism industry on the Central Coast Plateau area.

#### Tourism Vision Statement

***“The development of a viable tourism industry which is sympathetic and adds value to the rural, natural and cultural attributes of the Central Coast Plateau”***

#### Tourism Goals:

- ✓ *a vibrant community*
- ✓ *sustainable industries*
- ✓ *a living environment*

## 6.2 Tourism Objectives

- Develop facilities and programs which will enhance the visitor experience on the Central Coast Plateau.
- Increase market awareness of the Central Coast Plateau as a tourist destination
- Facilitate visitor and community access to tourism services, facilities and attractions.
- Ensure that tourism development is environmentally and economically sustainable and compatible with the rural, natural and cultural values of this region.

## 6.3 Key Issues Impacting the Objectives

There are a number of important issues which can impact on the development of tourism in Central Coast Plateau area. Some of these issues are outside of local control, however they should be monitored and mitigation strategies put in place. Other issues are local in nature and controllable or manageable by Gosford City Council or the local tourism industry.

**External issues** which can have an effect are:

- Changing demographics. As the population ages they will desire different forms of leisure experiences and require different forms of accommodation, entertainment and activities.
- Changing travel patterns and desires
- Changing spending patterns – increase spending on household debt, home entertainment, interest
- Fuel prices – regional Australia is seeing a significant downturn in drive travel but the Plateau is close enough to be attractive.
- Uncertain workplace conditions – many Australians not taking holidays.

**Internal issues** which can have an effect are:

- Fragmented planning – there is a need for better coordination and integration on policies and planning directly or indirectly related to tourism.
- In addition, the Gosford City Council needs to involve Central Coast Tourism Inc. in the strategic directions on council policies impacting tourism development.
- Water supply and management.
- Balance between the impact of extractive industries on the ambience and environmental attributes of the area.
- Growth in retirement and sea/land change- new migration to the area and potential conflict with existing industries.
- Highly seasonal patterns of visitation which cause fluctuations in resource utilisation, employment and general business activity.
- Competition from other regional destinations.
- Continued community support for tourism and recognition of its economic and social contributions to the area.

## 6.4 Achieving the Vision – Action Plan

### Strategy 1

Develop facilities and programs which will enhance the visitor experience on the Central Coast Plateau.

No.	Actions	Lead Agency	Stake holders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
1.1	Highlight the agricultural strengths of the area by promoting <ul style="list-style-type: none"> <li>• Farmers day</li> <li>• Field days</li> <li>• Branding farm produce, nurseries</li> <li>• Local shops selling local produce – jams, preserved fruits, vegetables, flowers</li> <li>• Local restaurants/cafes using local produce</li> </ul>	GCC	CCT DSARD CCP community Farmers Business community Dept of Primary Industry	Private sector DSARD main street development program. DPI	2007- 08	Essential
1.2	Provide accessible public toilets, BBQ sites, footpaths	GCC, NPWS	Local community groups	GCC State Govt	2007 - 09	Essential
1.3	Provide pet friendly rest areas	GCC		GCC Community.	2008	Important
1.4	Facilitate development of public art using local artists	GCC Dept of Arts & Culture	Community groups	State Govt	2008-09	Desirable

### Notes

The above actions capitalise the agricultural strengths of the area in a cost effective manner. The farmers market needs to be of a scale which is manageable and one designed to be different to existing markets in the region. Underpinning all of these activities is a need for the farmers to develop and embrace a Central Coast Plateau brand. The strategy is for this area to develop a reputation for quality fresh produce and products.

The facilities and public art are additional “value adds” or “hooks” for visitors to stop and spend time in this area and increase community pride in the look and feel of the area.

## Strategy 2

Encourage the development of tourism infrastructure on the Central Coast Plateau

No.	Actions	Lead Agency	Stakeholders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
2.1	Create an integrated tourism precinct with a critical mass of tourist related products.	GCC Planning NSW	CCT DSARD TNSW	Private sector DSARD main street development program	2007- 09	Essential
2.2	Facilitate development of viable tourism accommodation subject to environmental sustainability	GCC	DSARD CCT Business Central Coast		2006-10	Essential
2.3	Facilitate the development of art/craft galleries, cottage industries and additional eateries and a country pub within the precinct zone.	DSARD Business Central Coast	GCC CCT	Private sector	2006 -10	Essential
2.4	Encourage program expansions of existing attractions and clubs.	GCC	CCT DSARD	Private Sector	2006 -10	Essential

### Notes

#### Tourism Precinct

One of most critical success factors for tourism growth to this area is the development of a tourism precinct. This will provide a focus for visitors and residents and develop a sense of place for the community. The location of this precinct will also be crucial to its commercial success. The locational factors include:

- Positioned along the main transport spine in this area – Georges Downes Drive
- Accessibility to the F3
- Potential to showcase the product strengths of the Plateau – landscape, nurseries and attractions
- Proximity to existing businesses
- Availability of land for this development
- Provision of a balanced planning framework for developers to minimise their capital risks.

There 3 possible options for this precinct – Peats Ridge, Central Mangrove and Kulnura.

Given the above factors it is suggested that a precinct in close proximity to the existing shops and nurseries at Peats Ridge would be the preferred location option. This location will potentially attract

- Through traffic along the F3 Freeway as a short detour off the Freeway for a rest and recreation stop but within a village atmosphere instead of a fast food outlet
- Traffic heading to the Hunter Valley using Tourist Drive 33
- Day visitors to the Plateau from Sydney and Gosford
- Overnight visitors to the Plateau
- Residents of the Plateau.

If well designed and developed – perhaps utilising energy and water conservation techniques, low impact building techniques like mud bricks etc, this precinct could also be a showcase for sustainable tourism development and building design. This design development strategy in itself has the potential to attract funding assistance from the Federal Government and potentially establish itself as a unique destination.

Landscaping design associated with the precinct and buildings should also be of a standard that reflects the diversity and quality of the wholesale nurseries in this area.

The proposed expansions to the Green Hill (Springs) Golf Course and new nurseries close to the Peats Ridge village may provide the impetus for this precinct development.

The mix of uses is also crucial for this precinct to be economically sustainable.

The type of retail activity could include,

- Galleries, art and craft shops – pottery, leather goods, glass design etc
- Fresh fruit, flowers and vegetable shops,
- Butcheries and smallgoods
- Antique shops
- Cafes with outdoor sitting
- Country style pub/hotel with outdoor beer garden
- Equestrian related retail

Associated with this could also be public amenities such as barbeques, village green, toilets and car parks. Examples of this style of development include Berrima- Southern Highlands, Mogo and Cobargo on the South Coast. St Albans and Wollombi are other examples.

**The establishment of this precinct will be an important stimulus for the economic and social well being of this area. This precinct will provide a sense of place for the Central Coast Plateau.**

### **Tourism Accommodation**

The other critical factor is the need for tourist accommodation and an increase in the number of beds in this area – non dormitory style. There will be a need for a blend of accommodation types – nature based ecolodges/equestrian lodges/or resorts within existing golf courses plus bed and breakfasts, retreats and farm stays.

For resorts to be viable as a rule of thumb a minimum of 100 beds would be needed. This provides owners the capacity to actively market both their properties and this destination. Destinalional marketing done by the bigger establishments will have flow on benefits for the smaller accommodation houses. Generally, B&B owners have very limited funds for marketing - hence impacting on their viability.

The accommodation strategy proposed leverages the strengths of this area. It also defines a diversity of accommodation choices to attract the high yield markets from Sydney, Newcastle and international visitors.

A key imperative in the provision of accommodation is to ensure that the developments are sympathetic to the environment. The scale of buildings should not be multistorey and should be cognisant of the water management issues facing the Plateau and local traffic impact issues.

To achieve this objective the existing planning framework of the Gosford City Council needs to be revised.

The proposed developments in Section 4 of this report should also be facilitated by the Gosford City Council.

### Strategy 3

#### Improve visitor accessibility to the Central Coast Plateau

No.	Actions	Lead Agency	Stakeholders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
3.1	Create a sense of arrival in close proximity of the first exit off from F3 with a sign – “Welcome to the Central Coast Plateau” and a list of attractions and services (symbols)	RTA	GCC CCT TNSW	RTA	2008	Essential
3.2	A good tourist roadside Maps of the area at Peats Ridge, Kariong, Somersby, Ourimbah, Crossroads	GCC	DSARD CCT Business Central Coast	Private sector GCC	2007	Essential
3.3	Signs with distances to villages and Hunter Valley.	RTA	GCC CCT	RTA	2008	Important
3.4	Themed Tourist Route like the Grand Pacific Drive.	RTA CCT CCC Wyong Council	HRTO TNSW	Private Sector	2006 -10	Important
3.5	Change Tourist signs along Freeway to highlight the destination “Central Coast Plateau” followed by village names.	RTA	GCC CCT TNSW	RTA	2009	Desirable
3.6	Website for the area once a marketing identity is agreed upon. Links with CCT important	CCT Local communit y	GCC CCT TNSW	Grants from state and federal Governments	2008	Important
3.7	Greater promotion of the area in the new VIC at Kariong rather than just members only.	CCT	CCT,GCC, Operators	CCT, Tourism operators	2008-09	Important
3.8	Improve signage from the Central Coast Plateau to Somersby.	GCC	RTA CCT	GCC	2008-9	Desirable
3.9	Develop and print tear off maps	GCC, CCT	Operators	Operators, sponsors and GCC	2007	Essential

## Notes

The key issue in the instance is agreement on a name for the study area. It is currently known by the villages in the area – Mangrove Mountain, Peats Ridge, Central Mangrove, Lower Mangrove, Kulnura etc. Community agreement is needed on an area descriptor such as “The Central Coast Plateau” This would be the umbrella and overarching name of the area and each village will also continue to have their existing names.

Once this issue is finalised then from a destinational marketing perspective it is easier to market and sign post – refer to recommendations 3.1 and 3.5

Notwithstanding the destinational name issue, there is an urgent need to upgrade signage in the study area. Visitors are not aware of what is available and need to seek guidance from locals in many instances. Hence the recommendation of new signs and an updated visitor map of the area.

The major market for this area is the “drive market”. A trend in overseas destinations and lately in Queensland and in NSW is to theme drive routes. This area has one of the oldest tourist drives in NSW – Number 33. To the consumer “Tourist Drive 33” is meaningless and there is no marketing collateral produced by RTA or TNSW on the experiences available along of this drive. An opportunity exists to theme this drive along similar lines of the Grand Pacific Drive – which links Sydney, Wollongong, Kiama and Shellharbour. Preliminary discussions with the Hunter Regional Tourist Organisation and Central Coast Tourism Inc. suggests that they would be happy to work with the respective Councils, local communities to theme this Drive as an alternative route linking Sydney to the Hunter Valley

Finally, a simple immediate action, possibly initiated by the GCC and the CCT Inc is the production of a tear off map of the Central Coast Plateau. This map should be well designed consumer friendly map and have all the tourism and other retail and service businesses listed on it. The map should be made available free of charge in all businesses at the major attractions, on the Central Coast Plateau and at the Visitor Information Centres in this region.

## Strategy 4

Establish a destinational marketing strategy for Central Coast Plateau

No.	Actions	Lead Agency	Stakeholders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
4.1	Develop a marketing strategy for the Central Coast Plateau.	CCT	GCC CCT TNSW DSARD DPI	DSARD GCC	2007	Essential
4.2	Develop a marketing Brand for the area which is acceptable to both the agricultural and tourism industries and the community.	GCC	DSARD CCT Business Central Coast DPI	DSARD TNSW DPI	2007	Essential
4.3	Encourage the implementation of the Brand and marketing strategy.	CCT	All Agencies All operators	All Agencies All operators	2009	Essential
4.4	Greater cross promotion and network development between tourism operators and local retail outlets.	Business Central Coast	CCT Operators	Nil	2007	Essential

### Notes

This area lacks awareness in the market place. There is an urgent need to have a marketing strategy to market the products within it in a coordinated and integrated manner.

Given the scale of the area on one hand and the world class qualities of the products and produce from the area, it is suggested an integrated branding strategy for Central Coast Plateau be develop. **This brand should not be limited to the tourism industry.** It needs to be inclusive of all the industries within the area. This would include the agriculture- orchards, citrus plantations, flowers, plants, vegetables, primary production – beef, poultry as well as the water extraction industry. The collaborative actions suggested in this objective will generate long term social and economic benefits to this area.

## Strategy 5

Improve the look and feel of the Central Coast Plateau

No.	Actions	Lead Agency	Stakeholders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
5.1	Ensure the ongoing maintenance and preservation of the landscape character of the area	GCC	Community	GCC	Ongoing	Essential
5.2	Establish a unifying theme for the main thoroughfares in the area by the planting of Gynea Lilies along the roadsides and the use of local stone.	GCC	Community	RTA GCC	Ongoing	Essential
5.3	Maintain the public art around shelters and upgrade the Old Ridge Milk Bar	GCC	Community	Community sponsorship	Ongoing	Essential
5.4	Upgrade existing car parks at each of the villages	GCC	Community	GCC	2007 - 2010	Important
5.5	Improve the streetscape at the Crossroads junction, Peats Ridge,	GCC	Community	GCC Community sponsorship	2007 – 2010	Important

### Notes

The maintenance and preservation of the ambience of the rural landscapes, narrow winding roads, farming and orchards is important to the tourism industry. This is one of the factors bringing visitors to this area. There is an exciting opportunity to give this area its own distinctive feel using a plant species native to the area – Gynea Lily. Community groups and the GCC should be encouraged to plant Gynea Lilies along all of the roads. This distinguishing feature will be a great attraction to visitors.

Opportunities also exist for the community to seek major sponsorships from major companies with an interest in the area to improve key public amenities and streetscapes the crossroads junction, the old ridge milk bar which was a local icon in the past.

## Strategy 6

### Planning and Management of Central Coast Plateau

No.	Actions	Lead Agency	Stakeholders	Potential Funding Sources	Timeframe	Priority Essential Important Desirable Optional
6.1	Review of the Gosford City Council LEP for the Central Coast Plateau to encourage sustainable and viable tourism business enterprises.	GCC	CCT TNSW DSARD	GCC	2007	Essential
6.2	Involvement and contribution to the Regional Conservation Plan.	GCC	CCT TNSW DSARD	GCC	2007/8	Essential

#### Notes

The current Gosford City Council LEP which acknowledging the need to support new tourism enterprises has a number of limitations on density, type of use and location of tourism developments. The focus of the current LEP is on sustainable and density control it is suggested that the focus should also include viability of businesses, employment generation as well as environmental sustainability.

These limitations have a serious impact on the viability of professional and fulltime tourism businesses. The scheme is skewed to supporting tourism activities which are subordinate to the primary industries of the area. Hence employment generative capacity of the existing scheme within the tourism sector is very limited.

The tourism industry should actively participate and contribute to the Proposed Regional Conservation Plan. The protection of the environment is significant to the tourism industry.

## **7.0 Conclusions**

The key issues which need to be answered with respect to the tourism industry in the Central Coast Plateau are as follows:

1. Is there potential for tourism growth on the Central Coast Plateau?
2. Does the local community support growth in the tourism industry?
3. What should be the focus of tourism in this area?
4. What strategic framework should be adopted to encourage the growth of the tourism industry on the Central Coast Plateau?

### **1. Is there potential for tourism growth on the Central Coast Plateau?**

The answer is yes subject to encouraging the appropriate style of tourism development which compliments and enhances the strengths of the Plateau.

The reality is that Gosford City Council Local Government Area is a dormitory residential area for Sydney. The Central Coast Strategic Plan recognises this phenomenon. From a tourism perspective the attractiveness of the Central Coast for tourists and visitors is intrinsically linked with its beaches, coasts and waterways. Increased residential growth will have an impact on the amenity of these resources and impinge on “getaway from it all” holiday mindset which the majority of visitors have. Strategically the Central Coast Plateau has the potential of providing a sustainable future and alternative for the tourism industry in the Gosford LGA.

### **2. Does the local community support growth in the tourism industry?**

At both the September 2003 and June 2006 community workshops, participants reaffirmed the need for an “economical viable community”. The community participants also supported the growth of tourism subject to the following

- Enhancement and co existence with the agricultural industry
- Sustainable both environmentally and economically
- Maintenance of the community lifestyle

### **3. What should be the focus of tourism in this area?**

There are basically 2 options available. The first is organic growth. This has been the approach thus far on the Plateau and the results have been limited. The second is to adopt a strategic approach which has the support of key stakeholders to an agreed framework as outlined in this document. The second approach is the preferred option as it provides certainty to both the investors and the community.

#### **4 What strategic framework should be adopted to encourage growth of the tourism industry on the Central Coast Plateau?**

The strategic framework recommended for the Central Coast Plateau tourism involves the following elements:

- Encourage the growth of day visitors to the area and increased expenditure on the purchase of goods and services from the local businesses.
- Increase investment on necessary tourism infrastructure.
- Develop a marketing strategy and a Brand for the Plateau which has the endorsement of both the tourism and agricultural industry.
- Improve the level of collaboration between the key stakeholders at all levels of Government and between the tourism industry, local businesses and the community.

Section 6 of this document outlines 6 specific strategies and 28 actions which can assist in the implementation of the above strategic framework.

# **APPENDICES**

## **Appendix 1**

### **Tourism Product Database on the Central Coast Plateau as at Feb 2006**

<b>Central Coast Plateau - Tourism Inventory</b>		
<b>Accommodation</b>	<b>Description</b>	<b>Location</b>
Woodlands Farm Stay	Reception centre, B&B, - beautiful gardens	Baines Road, Mangrove Mountain
Mangrove Mountain Retreat	Operated by Wesley Mission, cabins, swimming pool-disabled only, conventions, bushwalking, school holiday activities, disabled access	Wisemans Ferry Road, Mangrove Mountain
Christian Country Side Centre	Accommodation, conferences, Christian camps, camping, log cabins	Berecroy Road, Mangrove Mountain
Ashram Yoga Centre	weekend retreats, meditation, accommodation	Mangrove Creek Road, Lower Mangrove
Neverfail Holiday Park	camping, cabins, on Hawkesbury River	Morgans Road, Mt White
Spencer Cottage	5 star accommodation, good for families, short-term, access by road or boat	Spencer
Noonaweena Retreat	5 star accommodation, health spa, B&B	George Downes Drive, Kulnura
Villa Sorgenti	Award winning restaurant Italian/Seafood, conference & party room hire, wedding receptions, motel accommodation - open Mon-Sat 6pm till late, recently renovated	Kowara Road, Somersby
Forest Park Country Retreat	elegant country home- two queen bedrooms, fully equipped kitchen, glorious sunrooms, grass tennis court, BBQ, croquet, boules, exclusive use of the property, mature gardens, stunning views	Forest Road, Kulnura
Kiah Retreat	cattle Farm, cottage -self contained	Kulnura
The Retreat	Self Contained cottage	Lower Mangrove
Green Mans Valley Caravan Park	Camping, accommodation, boat hire	Morgans Road, Mt White
The Farm'	B&B	George Downes Drive, Kulnura
<b>Convention/Conference Centres</b>		
Linton Park Gardens	conference facilities, wedding receptions,	Wisemans Ferry Road, Somersby
Noonaweena Retreat	conference facilities, wedding receptions,	George Downes Drive, Kulnura
Old Sydney Town	conference, special events	Somersby

<b>Attractions</b>		
Westys	local historical archives, available for tours on request	Wisemans Ferry Road, Somersby
The Slab Hut	locally built bush wood furniture- (stunning furniture)	Peats Ridge Village, Peats Ridge
Australian Reptile Park	Australian Reptiles	Somersby
Central Coast Sands	Sand quarrying- guided tours available	Grants Road, Somersby
Aboriginal Sites	Darkunjung Land Council do guided tours	various sites, primarily, Somersby
Mangrove Dam	Picnic area, observatory, guided tours	Kulnura
The Observatory	Night star gazing, guided talks, educational	George Downes Drive, Kulnura
The Paint Ball Place	10 different fields, up to 150 people, BBQ lunch, bus & coach parking, shower facilities, team building, social and sports groups	Greta Road, Kulnura
First Strike	Laser Skirmish games,	Glenworth valley
Paint Ball Pete's	Team Building, corporate days, birthday and bucks parties	Mt White
Mt Penang Gardens	Contemporary Australian gardens	
Australia Walkabout Wildlife Park	Under new establishment- new products proposed native animals	Peats Ridge
<b>Horse Riding</b>		
Glenworth Valley	Horse riding, camping, skirmish, quad bikes	Mt White
Elcador Equestrian Centre	training, horse spelling	Wisemans Ferry Road, Somersby
Somersby Equestrian Centre		Falls Road, Somersby
<b>Annual events</b>		
The Spencer Cup	Annual event - Sunday of every long weekend	Triangle Island - Spencer
Bloodtree Festival	Annual event- April	Kulnura Oval
Mangrove Mountain Country Fair	Annual event- October	Grounds surrounding Mangrove Mountain Community Hall
Back to Mangrove Historical Displays	Bi-annual event	Mangrove Mountain Memorial Club
Peats Ridge Festival	annual event- dates TBA- targets Sydney and Central Coast visitors- 3 day music event	Glenworth Valley

Jazz festival	Annual event organised by Central Mangrove Public School, music, stalls, kids activities	Glenworth Valley
Mangrove Mountain Arts & Craft Show	Annual event - 1st weekend of November	Mangrove Mountain Community Hall
<b>Nature walks</b>		
Popran National Park	Emerald Pool and creek, 45 min bush walk (medium), can have a guided tour for \$18 per person, toilets, not wheelchair accessible, good signage	Iron Bark Road, Mangrove Mountain
Greengrove	Not accessible by car, 20 min hard walk- very steep, fantastic views, very scenic	Bedlam Creek, Lower Mangrove
Tom McKenzie Park	Pony Club, bush walking easy, medium and hard, waterfall, toilets, bushwalkers paradise	Wisemans Ferry Road, Mangrove Mountain
Dubbo Gully	Need a key to access, guided tours for \$20.00, bushwalks, Fairview Home- big old cedar built home, Gosford Council water catchment, Upper Mangrove Cemetery	Waratah Road, Mangrove Mountain
St Thomas Cemetery	old graves of pioneers, camping, funding for toilets, brochure currently being created	Upper Mangrove
Greengrove Cemetery - St Peter's	3 minute walk from gate, not wheelchair accessible	Mangrove Creek Road
Crafts Creek Reserve	2,000 acre reserve, bushwalkers paradise, waterfall	
Bedlam Creek Reserve	bushwalking, creek, native flowers	Berecry Road, Mangrove Mountain
Ironbark Reserve	Wheelchair friendly, walking trail, bush tucker trail being established - interpretive trail, beautiful bush walking, water fall, logs for picnics	Ironbark Road, Mangrove Mountain
Elizabeth Donovan Park	Council Reserve, fishing, camping, swimming, no toilets, funding for boat ramp	
John Donovan's Grave	bushwalking, very scenic, lookout	
Somersby Falls	Walks, picnic area, BBQ, toilets, easy access	
Great North Walk	Map Available	
Richard Woodbury Reserve	tables & chairs, picnic area, BBQs, swimming	Mangrove Creek Road- opposite Ashram

<b>Cafes/ Food</b>		
Mangrove Mountain General Store	IGA, takeaway food, outdoor eating, petrol	Wisemans Ferry Road, Somersby
Peats Ridge Service Station & Takeaway	Petrol, mechanical repairs, takeaway food, outdoor eating facilities	Peats Ridge
Corrugated Café	Café. food from local produce, great food, open Wed-Sun breakfast and lunch	Peats Ridge
The Old Oak Pizza	Pizza/pasta restaurant- open evenings Tuesday-Sunday?	Peats Ridge
Somersby General Store	Takeaway, outdoor eating, general store, Internet Café	Wisemans Ferry Road, Somersby
Waterfall CAFÉ	Café, toilet , gardens, café	Mt Penang Gardens
The Hub Café	General store, liquor shop, café, internet café, great food	Spencer
Road Warriors Café	Takeaway, outside dining, internet café	Mt White
Kulnura General Store	Takeaway and café, groceries, bottle shop, Internet Café	Kulnura
One Stop	takeaway food, coffee, groceries	Kulnura
<b>Nurseries</b>		
Marion Grove Nursery	Australian Camellia Specialists- wholesale and open to the public	810 Wisemans Ferry Road, Mangrove Mountain
Scotts Tubes	Big wholesale nursery- can telephone to visit	881 Wisemans Ferry Road, Mangrove Mountain
Old Viola's Place	Advanced nursery	Wisemans Ferry Road and Berecry Road
East Wood Nurseries	Natives, pines, various- happy to have visitors (wholesale)	Pemperton Hill Road, Mangrove Mountain
East Coast Wildflowers		RMB 4420 Kirks Road, Mangrove Mountain
Birnam Wood		2200 Springs Road Kulnura
Bibo Bonsai Nursery	Thurs, Fri 10.00am-5.00pm, sat-Sun 10.00am-4.00pm	Link Road, Peats Central Mangrove
Royale Orchids	Huge Farm Orchards	Breeze Road, Peats Ridge
Fabians Farm	Nursery- open to public Mon-Thurs 8.00am-4.00pm, Fri.- 8.00am-12.00pm	19 Waratah Road, Mangrove Mountain
High Ridge Nursery	Wholesale Nursery	RMB 21 Bloodtree Road, Mangrove Mountain
Bellbrook Nursery	Nursery, Café	Peats Ridge Village, Peats Ridge
Transplant Industries		183 Peats Ridge Road, Peats Ridge

The Wildflower Farm	Wholesale Nursery, guided tours available	Grants Road, Somersby
Southern Cross Orchids	Wholesale Nursery	70 Wisemans Ferry Road, Central Mangrove
Coachwood Nurseries	Wholesale Nursery	Wisemans Ferry Road, Somersby
Kawana Nurseries		400 Peats Ridge Road, Peats Ridge
Joan Anderson Nursery	open to public, free range eggs, jams, variety of plants	Wisemans Ferry Road, Lower Mangrove
Casuarina Grove Nursery	Wide variety of plants	Wisemans Ferry Road, Spencer
Central Coast Bulb Farm		Finns Road, Kulnura
Kulnura Nursery		
Macadamia Farm	Macadamia nuts, free range eggs, avocados- weekends only	George Downes Drive, Kulnura
Pine Lea Nurseries		419 Ironbark Road, Mangrove Mountain
Paradise Plants	Open 2 weekends of the year, wholesale nursery and beautiful gardens (will open an additional weekend for tourism purposes)	Greta Road, Kulnura
Green House Nursery	Tree, shrub and Hedging Plant Specialist	
Rochester's Bonsai & Suiseki Nursery		Kyola Road, Kulnura
Plant Biz		1515 Peats Ridge Road, Peats Ridge
Price's Plants		Rmb 1265 Wisemans Ferry Road, Somersby
Gale Citrus	Specialised in citrus trees	55 Bell Road, Mangrove Mountain
Mt White Nursery	Open to the public - weekends only	
<b>Service Clubs</b>		
Mangrove Mountain Memorial Club	10 hole golf course, restaurant, bar, conference/wedding reception facilities, entertainment, special events such as Melbourne Cup luncheon, bingo, raffles, TAB, BBQ facilities	Halliards Road, Central Mangrove
Mangrove Country Club- home of the big bottle	Chinese restaurant, bowling green, tennis courts, bar, karaoke, pool comps, TAB	George Downes Drive, Central Mangrove

<b>Fruit/Roadside Stalls</b>		
Jenny's Roadside Hut	flowers, gifts, children's clothes	George Downes Drive, Kulnura
Comensolis Citrus Farm	peaches and nectarines	Wisemans Ferry Road, Mangrove Mountain
Little White House	variety of local produce	Wisemans Ferry Road, Mangrove Mountain
Various stalls	Fresh fruit/vegetables/eggs	George Downes Drive, Central Mangrove to Kulnura
The Fruit Box	fresh local fruit and vegetables	Peats Ridge Road, Peats Ridge
Cammerleri's Fruit Stall	Fresh local fruit & veg	Collins Ave, Kulnura
The Big Pumpkin	fresh local fruit & veg, weekends only	Peats Ridge Road, Peats Ridge
<b>Golf Courses</b>		
The Green Hill Golf Course	18 hole golf course, future plans for accommodation, clubhouse and restaurant- prestigious course	
Mangrove Mountain Memorial Club	10 hole golf course- under construction for 18 holes and due for completion in 5 years	
<b>Ancillary Facilities</b>		
<b>Community Facilities</b>		
Mangrove Mountain Community Church	Beautiful Heritage building- great for wedding/christenings, all denominations, belongs to the community	Wisemans Ferry Road, Mangrove Mountain
Mangrove Mountain Community Hall	Available for hire, kitchen facilities, holds 200 people	
Bloodtree Sports Ground	children's playground, sports oval, toilets, canteen facilities, picnic facilities	Bloodtree Road, Mangrove Mountain
Mangrove Mountain Community Technology Centre	Training courses, office supplies, seniors group, printing, photocopying, tourism bureau possibility	Waratah Road, Mangrove Mountain
Spencer Community Centre	Available to hire, BBQ, picnic area, multi-purpose court, beautiful hall	
Kulnura Community Hall	parties/functions hire, owned by Wyong Council	
Mountain Medicine		Mangrove Mountain Village Shops
Somersby Sports Ground	sports oval	
Somersby Community Hall	Hold up to 60 people, kitchen toilets	

<b>Petrol Stations</b>		
	Kulnura General Store	
	Central Coast Tractors	Somersby
	Peats Ridge Service Station	
	Mangrove Mountain IGA	
	One Stop	Kulnura
	Spencer General Store	
<b>Public Toilets</b>		
	Mangrove Mountain	
	Spencer	
	Peats Ridge	
	Somersby (building to start before end of year)	

## **Appendix 2**

### **List of Operators consulted during the study**

## Central Coast Plateau

### Products Visited and Discussions

<b>Operator/Product</b>	<b>Location</b>
Sam Dominello	45 Euloo Road, Peats Ridge
Mr Ha, Manager The Green Hill Golf Course	Peats Ridge Road, Peats Ridge
Dubbo Gully -tour	Mangrove Mountain
Woodlands Country Stay	Baines Road, Mangrove Mountain
Paul Daly	Mangrove Mountain Memorial & Golf Club
Forest Park Country Retreat	Forest Road, Kulnura
Mangrove Creek Dam	Kulnura
Koolang Observatory	Kulnura
Royal Orchids	Brieses Road, Peats Ridge
Australian Walkabout Wildlife Park	Calga
Karingal Equestrian Centre	670 Wisemans Ferry Road, Mangrove Mountain
Paradise Plants	Kulnura
The Wildflower Farm	Somersby
Villa Sorgenti	Kowara Rd, Somersby
Somersby Falls	Somersby
Mrs Marler	Calga
Barton Lawler	Glenworth Valley
Nanny's Fruit Box	Peats Ridge
Margaret Pontifex	Mangrove Mountain & Districts Community Group

## **Appendix 3**

### **Market Segmentation**

**Research undertaken by  
Colmar Burton Market Research  
Tourism New South Wales  
2000-2004**

### **Appendix 3: Consumer Mindset Segmentation**

Colmar Burton undertook a detail study on consumer segmentation for See Australia (now Tourism Australia)

They identified 5 segments within the Australian market. These were:

- Pompadours – Up Market Travellers
- Compatriots – Family Travellers
- True Travellers – Nature/Culture travellers
- Wanderers – Touring Travellers
- Groupies – Peer Group Travellers

Mindset segments can cut across demographic and geographic boundaries, and provide greater depth of segmentation:

E.g. take two 55 year old married couples whose children have left home. One couple prefers luxury cruises and trips to Europe. The other prefers caravanning around Australia. From a marketing point of view the selection of the type and channel of marketing communications important.

Note that people may switch between mindsets, depending on the circumstance of the holiday

E.g. Sally and James usually prefer to rough it, going camping and bushwalking in national parks, but on their honeymoon they decide to go 5 stars all the way.

The tables below highlight the differences within each segment and between segments, the characteristics of the different segments and some visual representation of the segments.

The third table attempts to distinguish the expectation and activities each segment has on the 5 key holiday activity groupings – nature, water – beach/lake, food and wine, and arts/history/crafts/heritage

Segment	Example 1	Example 2
Pampadours (Luxury Travellers)	<ul style="list-style-type: none"> <li>• Cheryl and Richard, age 50</li> <li>• Travel to Noosa every year in December and stay at the Sheraton</li> <li>• They enjoy eating in quality restaurants, afternoon cappuccinos, shopping on Hastings St, lying by their resort pool reading books</li> </ul>	<ul style="list-style-type: none"> <li>• Sara and Robert, age 29</li> <li>• Work long hours as corporate lawyers and see holidays as time to indulge and relax</li> <li>• They plan regular weekends away at health retreats, wine regions and secluded nature resorts</li> </ul>
Compatriots (Family Travellers)	<ul style="list-style-type: none"> <li>• A family with 2 kids under 10</li> <li>• Each summer they rent the same cottage by the beach on the south coast</li> <li>• The kids like swimming and fishing</li> </ul>	<ul style="list-style-type: none"> <li>• A family with 3 kids</li> <li>• They travel to Surfer's Paradise and rent a self-contained apartment</li> <li>• They visit theme parks and the beach</li> </ul>
True Travellers (Adventure/Cultural Travellers)	<ul style="list-style-type: none"> <li>• Kate and Mark, aged 25</li> <li>• Going backpacking around the Northern Territory and will particularly visit out of the way places off the beaten track</li> <li>• They will stay in hostels and motels, or try camping in a swag</li> <li>• They'll be sure to eat crocodile and kangaroo</li> </ul>	<ul style="list-style-type: none"> <li>• Alison and Steve, aged 34</li> <li>• Flying from Sydney to Orange and hiring a car for a weekend to travel around the area</li> <li>• They stay in B&amp;Bs, go wine tasting at the lesser known wineries, and immerse themselves in the local culture</li> <li>• They make an effort to visit local markets, and try all the local food and wine</li> </ul>
Wanderers (Touring Travellers)	<ul style="list-style-type: none"> <li>• Marge and Bob, aged 65</li> <li>• Having recently retired, they have bought a caravan and will spend the next 6 months touring around NSW and QLD at a leisurely pace</li> </ul>	<ul style="list-style-type: none"> <li>• Jan and Phil, aged 55</li> <li>• They rent a car for a week and do a self-drive tour of historical towns in Victoria</li> <li>• They chat to the locals and seek out visitor information centres</li> </ul>
Groupies (Peer Group Travellers)	<ul style="list-style-type: none"> <li>• A group of 6 male friends aged 45 who go away for a boy's fishing and boating weekend</li> <li>• They stay in a large rented house by the water</li> <li>• During the day they fish and sail, at night they cook a gourmet seafood BBQ and sit around drinking wine and beer and smoking cigars</li> </ul>	<ul style="list-style-type: none"> <li>• A bushwalkers club (range of ages) who go on a week's hiking adventure</li> <li>• They hike and carry their tents and packs, camping in the national park</li> <li>• At night they sit around the campfire and toast marshmallows</li> <li>• At the end of the hike they go out for a big night on the town</li> </ul>

<b>Mindset Segment</b>	<b>Population % (Domestic)</b>	<b>Spend per day</b>	<b>Description</b>	<b>Accommodation</b>	<b>Transport</b>	<b>Services and Activities</b>
Pampadours	21%	\$172	Up-market; DFY; Indulgent; Female skew; White collar/ professional skew; Use o/s travel as frame of reference; Fashion conscious; Travel in adult couples	5-star Separate from kids Suites	Air Limo	Pools, retail, fine dining, views, wine choice, spas, salons, 24 hr services, FIT tours, personal guides, cocktail bar, casinos, golf, yachts, cruisers, good coffee, patisseries
Compatriots	25%	\$111	Middle market; Female skew; Wanting DFY but forced to compromise; Family focused; Role driven; Activities focused; Budget conscious; Like resorts and don't like camping	3-star+  Self contained cabins, cottages, burés, villas, apartments, motels	Own car  Public transport	Water sports, kids clubs, theme parks, takeaway/ fastfood, beer gardens, cinemas, picnic grounds, BBQs, group tours, outdoor activities, greenery, walking trails, RSLs
Wanderers	17%	\$132	Older skew; Adult couples; Empty nesters; Frequent tourists; Off-peak market; Keen observers; Favour difference; Like to potter	3-4 star self contained B&B	Own car, mobile homes, coach, fly/drive	Information centres, maps & guide books, local markets, short walking trails with lookouts, fast photo processing, souvenirs, libraries
True Travellers	17%	\$126	Experimental; Adventurous; Trail-blazing; Want an in-depth experience; Active; O/s orientation;	Camp Sites, B&B Motels	Own car  4Wdrive  Mobile Home	Maps and information, trail food, backpacks, guide books, local history, bush tucker, sporting equipment, general stores

			Seek difference and challenge			
Groupies	19%	\$123	Younger male skew; Travel in peer groups; DIY; Peak period travel; Strong repeat visitation;  Want party time; Shared activities and reunions; Limited budgets	Shared apartments, camp sites, hostels	Car, train, coach, economy air	Pubs & clubs, night clubs, beaches, fast food, laundromats, big fridges, eskies, cafes,

Experience	Mindset segment	Proposition/Activities
<b>Nature</b>	Pampadours	Seclusion, sounds of wilderness, romance, middle of nowhere, unspoilt, accesible, views and vistas, pampering, walks, World Heritage areas, quaint country
	Compatriots	Easy walking trails, World Heritage area, fossicking, seeing wildlife
	Wanderers	Natural and cultural heritage, driving routes, walking trail, views and lookouts, vistas, waterfalls, fishing, picnicking, bird watching, events
	True Travellers	Treks, 4WD, going bush, physical/mental challenge
	Groupies	Activities e.g. kayaking, bushwalking groups
<b>Water - beach/lake</b>	Pampadours	Exclusive beaches, proximity to quality cafes/restaurants, boat tours
	Compatriots	Rockpools, safe swimming beaches, flora/fauna, whales/dolphins, river/inlet/lake activities, built attractions, boogie boarding, fishing off jetties, sporting activities, catching your own fish
	Wanderers	Rivers, fishing, coastal walks, coastal touring routes, flora/fauna
	True Travellers	Remote beaches and hinterland, accessible flora and fauna
	Groupies	Water based activities, active beaches
<b>Food and wine</b>	Pampadours	Short break, indulgence, romance, boutique wineries, hot air ballooning
	Compatriots	Familiar wines, family restaurants, take away food
	Wanderers	Wine and food education, sense of finding something new, boutique cellar doors
	True Travellers	Undiscovered wineries, meeting the winemaker/chef, local cuisine, fresh produce
	Groupies	Eat, drink and be merry, wine/beer tasting coach tours
<b>Arts/culture/heritage/history</b>	Pampadours	High quality local artefacts, art exhibits, galleries, art shops
	Compatriots	Interactive historical sites
	Wanderers	Heritage buildings, antiques, craft stores
	True Travellers	Local artefacts, historical sites of significance, cultural tours
	Groupies	Tours



Compatriots





