



ECONOMIC DEVELOPMENT COMMITTEE

03 June 2025



COMMUNITY STRATEGIC PLAN 2018-2028

ONE – CENTRAL COAST IS THE COMMUNITY STRATEGIC PLAN (CSP) FOR THE CENTRAL COAST LOCAL GOVERNMENT AREA

ONE – CENTRAL COAST DEFINES THE COMMUNITY'S VISION AND IS OUR ROADMAP FOR THE FUTURE

ONE – CENTRAL COAST BRINGS TOGETHER EXTENSIVE COMMUNITY FEEDBACK TO SET KEY DIRECTIONS AND PRIORITIES

One - Central Coast will shape and inform Council's business activities, future plans, services and expenditure. Where actions are the responsibility of other organisations, sectors and groups to deliver, Council will work with key partners to advocate on behalf of our community.

Ultimately, every one of us who live on the Central Coast has an opportunity and responsibility to create a sustainable future from which we can all benefit. Working together we can make a difference.

RESPONSIBLE

WE'RE A RESPONSIBLE COUNCIL AND COMMUNITY, COMMITTED TO BUILDING STRONG RELATIONSHIPS AND DELIVERING A GREAT CUSTOMER EXPERIENCE IN ALL OUR INTERACTIONS.

We value transparent and meaningful communication and use community feedback to drive strategic decision making and expenditure, particularly around the delivery of essential infrastructure projects that increase the safety, liveability and sustainability of our region. We're taking a strategic approach to ensure our planning and development processes are sustainable and accessible and are designed to preserve the unique character of the coast.

 **Good governance and great partnerships**

G2 Engage and communicate openly and honestly with the community to build a relationship based on trust, transparency, respect and use community participation and feedback to inform decision making

There are 5 themes, 12 focus areas and 48 objectives

COMMUNITY STRATEGIC PLAN 2018-2028 FRAMEWORK

All council reports contained within the Business Paper are now aligned to the Community Strategic Plan. Each report will contain a cross reference to a Theme, Focus Area and Objective within the framework of the Plan.

The infographic details the following structure:

- THEME: BELONGING**
 - Focus Area: OUR COMMUNITY (C1-C4)
 - Focus Area: COMMUNITY CONNECTION AND LOCAL IDENTITY (S1-S4)
- THEME: SMART**
 - Focus Area: A GROWING AND COMPETITIVE REGION (C1-C4)
 - Focus Area: A PLACE OF OPPORTUNITY FOR PEOPLE (S1-S4)
- THEME: GREEN**
 - Focus Area: ENVIRONMENTAL WELL-BEING FOR THE FUTURE (C1-C4)
 - Focus Area: INCREASED RAIN WATER RECEPTION CAPACITY (S1-S4)
- THEME: RESPONSIBLE**
 - Focus Area: GOOD GOVERNANCE AND GREAT PARTNERSHIPS (C1-C4)
 - Focus Area: BELONGING THROUGH INFRASTRUCTURE (S1-S4)
 - Focus Area: SAFE, ACTIVE AND SUSTAINABLE DEVELOPMENT (S1-S4)
- THEME: LIVEABLE**
 - Focus Area: RELIABLE PUBLIC TRANSPORT AND CONNECTIONS (C1-C4)
 - Focus Area: SAFE AND HEALTHY LIVES (S1-S4)
 - Focus Area: HEALTHY LIFESTYLES (S1-S4)



Oath or Affirmation of Office

Councillors are reminded of their Oath or Affirmation of Office to undertake their duties in the best interests of the people of the Central Coast and Council and to faithfully and impartially carry out the functions, powers, authorities, and discretions vested in them under the *Local Government Act 1993*, or any other Act to the best of their ability and judgement. Councillors are also reminded of their obligations under the Code of Conduct to disclose and appropriately manage conflicts of interest.

Disclosures of Interest

Councillors are reminded of their obligation under Council's Code of Conduct to declare any conflict of interest in a matter considered by Council.

Pecuniary interest: A Councillor who has a **pecuniary interest** in any matter with which the Council is concerned, and who is present at a meeting of the Council at which the matter is being considered, must disclose the nature of the interest to the meeting. The Councillor must not be present at, or in sight of, the meeting:

- a) At any time during which the matter is being considered or discussed, or
- b) At any time during which the Council is voting on any question in relation to the matter.

Non-Pecuniary conflict of interest: A Councillor who has a **non-pecuniary conflict of interest** in a matter, must disclose the relevant private interest in relation to the matter fully and on each occasion on which the non-pecuniary conflict of interest arises in relation to the matter.

Significant Non-Pecuniary conflict of interest: A Councillor who has a **significant** non-pecuniary conflict of interest in relation to a matter under consideration at a Council meeting, must manage the conflict of interest as if they had a pecuniary interest in the matter.

Non-Significant Non-Pecuniary interest: A Councillor who determines that they have a non-pecuniary conflict of interest in a matter that is **not significant** and does not require further action, when disclosing the interest it must also be explained why the conflict of interest is not significant and does not require further action in the circumstances.

Recording

In accordance with the *NSW Privacy and Personal Information Protection Act 1998*, you are advised that all discussion held during the Committee meeting is recorded for the purpose of livestreaming the public meeting and verifying the minutes. This will include any public discussion involving a councillor, staff member or a member of the public.

Meeting Notice

**The Economic Development Committee
of Central Coast Council
will be held in Function Room 2,
2 Hely Street, Wyong,
on Tuesday 3 June 2025 at 5:00pm,
for the transaction of the business listed below:**

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Membership

Cr John McNamara	Chairperson
Cr Jane Smith	Deputy Chairperson
Mayor Lawrie McKinna	Member
Cr John Moulard	Member
Cr Trent McWaide	Member
Cr Belinda Neal	Member
Cr Kyle MacGregor	Member
Cr Jared Wright	Alternate 1

Councillor John McNamara

Chairperson

1.1 INTRODUCTION: WELCOME, ACKNOWLEDGEMENT OF COUNTRY, AND APOLOGIES

ITEM 1.1

WELCOME

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Custodians of the land on which we live, work and play.

We pay our respects to Darkinjung Country, and Elders past and present.

We recognise the continued connection to these lands and waterways and extend this acknowledgement to the homelands and stories of those who also call this place home.

We recognise our future leaders and the shared responsibility to care for and protect our place and people.

APOLOGIES

Mayor Lawrie McKinna

ITEM 1.2

DISCLOSURES OF INTEREST

Chapter 14 of the *Local Government Act 1993* ("LG Act") regulates the way in which the councillors and relevant staff of Council conduct themselves to ensure that there is no conflict between their private interests and their public functions.

Section 451 of the LG Act states:

- "(1) A councillor or a member of a council committee who has a pecuniary interest in any matter with which the council is concerned and who is present at a meeting of the council or committee at which the matter is being considered must disclose the nature of the interest to the meeting as soon as practicable.*
- (2) The councillor or member must not be present at, or in sight of, the meeting of the council or committee:*
 - (a) at any time during which the matter is being considered or discussed by the council or committee, or*
 - (b) at any time during which the council or committee is voting on any question in relation to the matter.*

1.2 Disclosures of Interest (cont'd)

- (3) *For the removal of doubt, a councillor or a member of a council committee is not prevented by this section from being present at and taking part in a meeting at which a matter is being considered, or from voting on the matter, merely because the councillor or member has an interest in the matter of a kind referred to in section 448.*
- (4) *Subsections (1) and (2) do not apply to a councillor who has a pecuniary interest in a matter that is being considered at a meeting, if:*
- (a) *the matter is a proposal relating to:*
 - (i) *the making of a principal environmental planning instrument applying to the whole or a significant part of the council's area, or*
 - (ii) *the amendment, alteration or repeal of an environmental planning instrument where the amendment, alteration or repeal applies to the whole or a significant part of the council's area, and*
 - (a1) *the pecuniary interest arises only because of an interest of the councillor in the councillor's principal place of residence or an interest of another person (whose interests are relevant under section 443) in that person's principal place of residence, and*
 - (b) *the councillor made a special disclosure under this section in relation to the interest before the commencement of the meeting.*
- (5) *The special disclosure of the pecuniary interest must, as soon as practicable after the disclosure is made, be laid on the table at a meeting of the council and must:*
- (a) *be in the form prescribed by the regulations, and*
 - (b) *contain the information required by the regulations."*

Further, the Code of Conduct adopted by Council applies to all councillors and staff. The Code relevantly provides that if a councillor or staff have a non-pecuniary conflict of interest, the nature of the conflict must be disclosed as well as providing for a number of ways in which a non-pecuniary conflicts of interests might be managed.

Recommendation

That Committee members and staff now disclose any conflicts of interest in matters under consideration at this meeting.

Item No: 1.3
Title: Confirmation of Minutes of Previous Meeting
Department: Corporate Services

3 June 2025 Economic Development Committee

Reference: F2025/00095 - D16840381



CONFIRMATION OF MINUTES


Recommendation

That the Committee confirm the minutes of the previous Economic Development Committee held on Tuesday 6 May 2025.

Summary

Confirmation of minutes of the previous Economic Development Committee held on Tuesday 6 May 2025.

Attachments

1   MINUTES - Economic Development Committee - 6 May 2025 D16813387



Central Coast Council

Economic Development Committee

Held in Function Room at
2 Hely Street, Wyong

06 May 2025

MINUTES

Attendance

Members

Cr John McNamara
Cr John Mouland
Cr Trent McWaide
Cr Belinda Neal
Cr Kyle MacGregor
Cr Jane Smith
Cr Jared Wright
Mayor Lawrie McKinna

Status

Present
Present
Present
Apology
Present (remotely)
Present
Present
Apology

Guest

Scott Goold, Regional Director, Business
NSW
Allison Basford, Chief Executive Officer,
Space Urban
Mark Daniels, Planning & Development
Manager, Space Urban
Deputy Mayor Doug Eaton OAM
Cr Margot Castles
Cr Sharon Walsh
Cr Jared Wright

Status

Present
Present
Present
Present
Arrived at 5:27pm
Present
Present
Present

Staff

Mel Smith, Director Community and
Recreation Services
Sue Ledingham, Unit Manager Economic
Development
Shannon Turkington, Unit Manager
Strategic Planning

Status

Present
Present
Present

Minutes of the Ordinary Meeting Economic Development Committee of Council (cont'd)

Bianca Gilmore, Section Manager Destination Marketing and Visitor Services	Present
Scott Duncan, Section Manager Local Planning and Policy	Present
Briony Stiles, Civic Support Team Leader	Present
Lisa Martin, Civic Support Officer	Present

The Chairperson, Cr John McNamara declared the meeting open at 5:08pm

UNCONFIRMED

Minutes of the Ordinary Meeting Economic Development Committee of Council (cont'd)

REPORTS

1.1 Introduction: Welcome, Acknowledgement of Country, and Apologies

5:09pm

Mayor Lawrie McKinna and Councillor Belinda Neal have both provided an apology for this meeting in advance.

The Chairperson read an Acknowledgement of Country.

1.2 Disclosures of Interest

5:10pm

No conflicts of interest were disclosed.

1.3 Confirmation of Minutes of Previous Meeting

5:11pm

A MOTION was *MOVED* by Councillor Wright and *SECONDED* by Councillor MOULAND:

EDC7/25

That the Committee confirms the minutes of the previous Economic Development Committee held on Tuesday 1 April 2025.

CARRIED

FOR: UNANIMOUS

1.4 Business NSW

5:12pm

Scott Goold, Regional Director of Business NSW spoke to the Regional Business NSW Presentation.

1.5 Upcoming Projects on the Central Coast including 2 Wella Way, Somersby by Space Urban

5:29pm

Allison Basford, Chief Executive Officer and Mark Daniels, Planning & Development Manager, from Space Urban spoke to the presentation 'Central Coast Projects'.

Minutes of the Ordinary Meeting Economic Development Committee of Council (cont'd)

1.6 Destination Central Coast, Visitor Economy Update

5:48pm

The Section Manager of Destination Marketing and Visitor Services spoke to the Destination Central Coast Presentation.

1.7 Economic Development Strategy and Destination Management Plan Project Update

6:06pm

A MOTION was *MOVED* by Councillor MOULAND and *SECONDED* by Councillor MCWAIDE:

EDC8/25

That the Committee:

- 1 Schedules a workshop in July 2025.**
- 2 Notes the Economic Development Strategy and Destination Management Plan Project Update.**

CARRIED

FOR: UNANIMOUS

1.8 Draft Central Coast Employment Land Strategy - Public Exhibition

6:07pm

The Section Manager of Local Planning and Policy spoke to the 'Draft Central Coast Employment Land Strategy' presentation.

A MOTION was *MOVED* by Councillor MOULAND and *SECONDED* by Councillor WRIGHT:

EDC9/25

That the Committee:

- 1 Recommends to Council to endorse the draft Central Coast Employment Land Strategy (Attachment 1) and Background Report (Attachment 2) to be placed on public exhibition for a minimum of 42 days.**
- 2 Receives a report on the outcome of the community consultation.**

CARRIED

FOR: UNANIMOUS

Minutes of the Ordinary Meeting Economic Development Committee of Council (cont'd)

1.9 Central Coast Air Show

6:32pm

Recommendation

That the Committee:

- 1 Notes the extensive insight into staging of future events at Central Coast (Warnervale) Airport gained through the after-event review of the 2024 Central Coast Air Show.
- 2 Acknowledges the resources and time needed to secure a suitable air show operator, gain the necessary approvals and undertake all necessary engagement with external stakeholders such as transport and emergency service agencies prior to staging future air shows on the Central Coast.
- 3 Endorses in principle the holding of future air shows at Central Coast (Warnervale) Airport.
- 4 Recommends to Council that a process to select a suitable air show operator commence as soon as possible, with a view to holding an air show at a suitable time in the 2026-27 financial year.

EDC10/25

That the Committee defer the consideration of item 1.9 to the Economic Development Committee meeting to be held on 3 June 2025, was **MOVED** by Councillor WRIGHT and seconded by Councillor MCWAIDE:

CARRIED

FOR: UNANIMOUS

1.10 Business Retention and Expansion Survey Report

6:34pm

EDC11/25

That the Committee:

- 1 Notes The Business Retention and Expansion Survey Report.**
- 2 Endorses The Distribution of the Final Report to Business Industry and on Council's website with supporting communications that will include Council's actions underway and commitment to use the feedback for future service improvements.**
- 3 Notes The survey results will be used to inform the research for the new economic development strategy and business concierge service.**

CARRIED

FOR: UNANIMOUS

Minutes of the Ordinary Meeting Economic Development Committee of Council (cont'd)

The next meeting is to be held at 5:00pm on Tuesday 3 June 2025 at the Wyong Administration Building.

The Meeting concluded at 6:34pm.

UNCONFIRMED

Item No: 1.4
Title: Items Resolved by Exception
Department: Corporate Services

3 June 2025 Economic Development Committee

Reference: F2025/00095 - D16842052



Recommendation

That the Committee determines the items on Economic Development Committee Agenda that will be adopted without debate.

Summary

In accordance with Council's Code of Meeting Practice, items that are dealt with by exception are items where the recommendations contained in the staff reports in the agenda are adopted without discussion.

ITEM 1.5

PRESENTATION BY TRANSPORT FOR NSW - SMART CENTRAL COAST BLUEPRINT

Seldon Coventry – Acting Smart Places Program Lead
Sandy Burgoyne – Acting Director, Transport Modelling
Rory Brown – Executive Director, Smart Places



Item No: 1.6
Title: Central Coast Visitor Accommodation Futures Study and Development Action Plan
Department: Community and Recreation Services

3 June 2025 Economic Development Committee

Reference: F2025/00095 - D16840331
Author: Andrew Powrie, Business Economic Development Manager
Manager: Sue Ledingham, Unit Manager Customer Marketing and Economic Development
Executive: Melanie Smith, Director Community and Recreation Services

Recommendation

That the Committee:

- 1 Supports the Visitor Accommodation Futures Study and Development Action Plan at Attachment 1 to this report.***
- 2 Recommends to Council that Council adopts the Visitor Accommodation Futures Study and Development Action Plan.***

Report purpose

To inform the committee on the Visitor Accommodation Futures Study and Development Action Plan and proposed next steps.

Executive Summary

Council engaged Urban Enterprise Consultancy to undertake a Visitor Accommodation Futures Study and Action Plan (the Plan). The core objective of the project was to identify the supply need for visitor accommodation on the Coast and to identify actions to support future investment in visitor accommodation.

This report provides a summary of the findings from the Plan and proposed actions that sit under two strategic directions identified: facilitating investment and de-risking investment. One of the facilitating investment actions was the production of an Accommodation Investment Prospectus; it is proposed that this be finalised, and a marketing activity be undertaken to support its distribution.

Background

Council's Economic Development Strategy 2040 identified tourism as a key regional strength and accommodation as a lead component to support it, with the provision of new accommodation product needed to strengthen the visitor economy. Council's subsequent Destination Management Plan 2022-2025 (the DMP) also identified new visitor accommodation was required at all destinations across the Central Coast to support growth and meet current capacity constraints.

The Central Coast has a low supply of commercial visitor accommodation. There has been a significant period of time, over 15 years (2007), since a major new-build hotel has opened on the Central Coast. However, the 86-room hotel extension to the Mingara Recreation Club in Tumbi Umbi opened in December 2024. There are two (2) new hotels that are at the latter stages of development: the 130 room Archibald in Gosford and the 17-room Saddles Lodge Boutique Hotel in Mount White.

Report

Visitor accommodation is important for:

- growing overnight visitation and visitor yield.
- attracting major events.
- enabling access and improve visitor dispersal across the Central Coast.
- supporting vibrant precincts.
- Increasing economic growth, particularly for the Tourism industry, retail and food and beverage.

In developing the Plan, an assessment of the current accommodation supply and the supply gaps notes:

- The Central Coast has a low supply of commercial visitor accommodation, representing just 21% of total room supply.
- As best practice, accommodation providers typically renovate stock every 5 to 7 years. At the time of reporting, only 33% of all commercial room stock in the Central Coast had undergone refurbishment in this period, indicating the majority of accommodation in region is tired and outdated.
- The majority of establishments are self-rated. Only seventeen properties have an accredited star rating by the AAA (Star Ratings Australia).

1.6 Central Coast Visitor Accommodation Futures Study and Development Action Plan (cont'd)

- Between 2017-18 and 2022-23, the Central Coast experienced a 23% increase in the number of overnight visitors. Over the same period, less than one hundred new rooms have been constructed in the region (4.5% growth).
- The development pipeline demonstrates planned investment in a diverse range of accommodation typologies with a high level of accommodation investment planned for Gosford. The majority of future supply will be in the mid to large scale accommodation market. Realising these opportunities is essential because it ensures that the region can effectively meet under-supplied demand.
- Based on visitation projections, it is estimated that an additional 2,900 rooms will be required across the Central Coast by 2035 (next ten years). This supply deficit will be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

Two strategic directions have been identified in the Plan to guide investment attraction and facilitation of visitor accommodation opportunities in Central Coast. These are:

1. Facilitate investment in new and ageing accommodation product aligned to the needs of Central Coast.

The Central Coast has not attracted the same level of investment in contemporary high-quality accommodation when compared to other regions such as Newcastle and Wollongong. Demand modelling for accommodation investment in the Central Coast highlights a substantial need for new bed spaces to meet future demand.

A focus on supporting investment in large scale accommodation, which would add critical bed supply to the region as well as new and experiential accommodation which improves the brand reputation of Central Coast, is required.

In addition to attracting new establishments, there is an opportunity to repurpose existing motel stock to meet the market need, as well as refurbishing existing hotel and resort accommodation.

This strategic direction has eight (8) actions assigned to Economic Development that fall into two areas:

- Communicating and directly marketing the accommodation supply shortfall to potential new investors, proposing an Investment Prospectus (Attachment 2) and insights from the Plan.
- Instigating a direct program of activity with established accommodation operators to guide reinvestment in current dated product. The specific actions under this theme are tabled below.

1.6 Central Coast Visitor Accommodation Futures Study and Development Action Plan (cont'd)

Strategic Direction 1:
Facilitate investment in new ageing accommodation product aligned to the needs of Central Coast.

No.	Action
1.1	Develop a Central Coast Accommodation Prospectus which identifies opportunities for investment in Central Coast.
1.2.	Promote the Central Coast Accommodation Prospectus through Council's media channels: LinkedIn, Council, website and other direct engagement.
1.3	Establish a contact list of existing and potential investors in accommodation development and owners of strategic sites suited to accommodation investment.
1.4	Undertake a forum which presents the Visitor Accommodation Futures Study and prospectus findings to existing and potential investors.
1.5	Use Economic Development CRM to distribute information to accommodation investors and promote opportunities for investment.
1.6	Develop a guide for reinvestment in motel accommodation stock including a financial model for reinvestment and case studies of effective examples.
1.7	Undertake a forum for motel owners across Central Coast with speakers from successful case study facilities who have made the transition.
1.8	Instigate potential for a small grant program for upgrades and refurbishments to existing accommodation stock particularly targeted around accessibility & inclusivity i.e. ramps, grab bars, door widening, sensory spaces etc.

2. Instigating a direct program of activity with established accommodation operators to guide reinvestment in current dated product.

This strategic direction identifies actions to strengthen the attractiveness of visitor accommodation investment in the Central Coast and, to strengthen current business conditions for accommodation businesses. Areas of focus include supporting visitor accommodation investment in appropriate rural locations, improving seasonality of visit through events and packaging of tourism products with accommodation operators.

The actions for the second Strategic Direction are assigned across:

- Strategic Planning – Actions 2.1 to 2.4 incorporating definitions, zoning, the inclusion of the Plan’s insights into the refresh of the Local Strategic Planning Statement and within the proposed Rural Lands Strategy’s development.
- Destination Marketing and Visitor Services – Actions 2.5 and 2.7 continuing to support the market and promote business events while working with the industry on packages that drive overnight stays.
- Events and Placemaking – Action 2.6 supporting the development and growth of events on the Central Coast.

1.6 Central Coast Visitor Accommodation Futures Study and Development Action Plan (cont'd)

The specific actions under this theme are tabled below.

Strategic Direction 2:

De-Risk accommodation investment in Central Coast

No.	Action
2.1	Undertake discussions with DPHI regarding the LEP practice note for tourism in relation to it being outdated and not reflecting current trends in product development and accommodation investment including terminology.
2.2	Consider the recommendations of the Visitor Accommodation Futures Study as part of any review of the Central Coast Local Strategic Planning Statement.
2.3	Ensure that visitor accommodation investment is considered within the Rural Lands Strategy proposed to be undertaken by Central Coast Council. This includes providing improved guidance around the location and appropriate investment in visitor accommodation.
2.4	Review LEP and DCP provisions to investigate opportunities for small scale tourist accommodation in rural and environmental zones. Develop planning guidelines to support assessment of Planning Proposals for larger scale tourist uses, such as experiential accommodation, ultra boutique offerings, caravan parks and other large scale tourism developments.
2.5	Continue to support business events, through maintaining the Central Coast meeting planners guide and continue relationship with Business Events NSW to promote Central Coast venues.
2.6	As per the Central Coast Destination Management Plan, undertake an internal review of events funding, resourcing and approach to events development for the tourism sector.
2.7	Support visitor accommodation and other tourism attraction, food and activity businesses to link and create packages to encourage overnight stays.

The directions from the Plan will also be used to inform the new Economic Development Strategy, the new Destination Management Plan and new Business Concierge Service.

Stakeholder Engagement

External Stakeholders

The Central Coast Regional Economy Taskforce have been provided regular updates on the development of this Plan and will be presented the final Plan and draft Investment Prospectus. This will specifically be usable investment collateral for both Business NSW and the Department of Primary Industries and Regional Development.

The study was informed by consultation with key tourism and accommodation industry stakeholders in the Central Coast as well as:

- Business NSW
- University of Newcastle & Hunter TAFE
- Developers
- Darkinjung Land Council.

1.6 Central Coast Visitor Accommodation Futures Study and Development Action Plan (cont'd)

The key barriers to investment identified through the stakeholder consultation process are:

- Long and complex planning processes.
- There are few incentives offered to operators to attract and retain investment.
- There is a perceived lack of transport and services infrastructure to sustain sufficient levels of visitation.
- Limited supply of serviced, unconstrained land is a key barrier to investment.
- Issues and barriers to entry that many investors face including cost and availability of land, cost of labour and permit processes.

Subject to Council's endorsement, the Plan will be presented to all agencies that sit on the Regional Economy Taskforce.

Internal Stakeholders

An Internal Working Group comprised of: Business Economic Development, Strategic Planning, Commercial Property, Destination Marketing and Visitor Services and Events and Placemaking. The final Plan will also be distributed across other specialist arms of Council for visibility and awareness.

Financial Considerations

Financial Year (FY) Implications.

The proposal does not have financial implications for the current year but impacts outer years in the LTFP. The LTFP includes an allowance for the ongoing impact.

Budget and Long-Term Financial Plan (LTFP) Impact.

The proposal does not have financial implications for the current year but impacts outer years in the LTFP. The LTFP includes an allowance for the ongoing impact.

The proposed actions have been identified in the Economic Development operational budget for the 2025-26 and 2026-27 financial years as noted in the action plan. Actions for Strategic Planning, Destination Marketing and Visitor Services and Events and Placemaking are within operational plan activities.

Link to Community Strategic Plan

Theme 2: Smart

Goal C: A growing and competitive region

S-C1: Target economic development in growth areas and major centres and provide incentives to attract businesses to the Central Coast.

1.6 Central Coast Visitor Accommodation Futures Study and Development Action Plan (cont'd)





Risk Management

There will be a market supply risk if new investment does not occur and the current dated product does not include some renovations and refurbishment for at least some of the properties.

Critical Dates or Timeframes

Investment marketing from the 2025-26 Financial Year.

Attachments

- | | | |
|---|---|-----------|
| 1  | EDC Central Coast VAF Study_Final Report 290425 | D16840539 |
|  | | |
| 2  | EDC Central Coast Accommodation Prospectus_FINAL DRAFT 300425 | D16840536 |
|  | | |



Central Coast Visitor Accommodation Futures Study and Development Action Plan

April 2025

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Custodians of the land on which we live, work and play.

We pay our respects to Darkinjung country, and Elders past and present. We recognise the continued connection to the lands and waterways and extend this acknowledgement to the homelands and stories of those who also call this place home. We recognise our future leaders and the shared responsibility to care for and protect our place and people.

The Central Coast Visitor Accommodation Futures Study & Development Action Plan was prepared by Urban Enterprise in collaboration with Central Coast Council.

Authors of this report are:

- Mike Ruzzene, Director
- Julia Cretan, Senior Consultant

DISCLAIMER

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EXECUTIVE SUMMARY

BACKGROUND AND MARKETS

Background and Context

Central Coast Council (Council) engaged Urban Enterprise to undertake a Visitor Accommodation Futures Study and Action Plan.

The core objective of the project is to identify need for visitor accommodation in Central Coast and to identify actions to support investment in visitor accommodation.

Central Coast has a population of over 350,000 people and is strategically located on the coastline of New South Wales, between Sydney and Newcastle, providing access to a market of almost 6 million people. The region contains a diverse range of unique environments including urban cities, ocean foreshore, coastal lakes and hinterland. These attributes make accommodation investment and development a prime opportunity for Central Coast.

There are a range of objectives that can be achieved through investment in visitor accommodation, which have been recognised and supported in state and local strategic documents and policy. Visitor accommodation is important for:

- Growing overnight visitation and visitor yield;
- Attracting major events;
- Enabling access and improve visitor dispersal across the coast;
- Supporting vibrant precincts; and
- Enabling affordability in the housing market.

Encouraging visitor accommodation investment requires consideration of the factors that make a destination attractive to investors. These include historical market performance and demand drivers, existing levels of competition, the supply of visitor amenity and attractions, skilled labour and land availability and governance.

The key barriers to accommodation investment in the region, as identified through consultation with key tourism and accommodation industry stakeholders, include long and complex planning processes, a lack of transport and services infrastructure, land supply constraints, seasonality and cost barriers to entry.

The NSW Government has implemented a range of planning scheme reforms aimed to promote agritourism and nighttime economic vibrancy in NSW, which will be considered in the identification of accommodation opportunities for Central Coast

A number of provisions conducive to accommodation investment are included in the Central Coast Local Environment Plan and should be promoted to investors. These include provisions relating to caravan parks and manufactured home estates, eco-tourist facilitation and additional permitted uses for purposes beyond those outlined in the specific zone.

Visitor Economy and Markets

Central Coast has a large and growing visitor economy and primarily attracts visitors for its water and nature-based assets and associated recreational activities and attractions. Emerging strengths include food and beverage, arts and culture, events and festivals.

Visitation is concentrated in the well-known centres of Gosford, Terrigal, The Entrance and the south coast of the municipality, which is most proximate to visitor markets in Sydney. The Hinterland region is lesser known as a visitor destination and lacks visitor ready accommodation, product, experience and infrastructure.

In 2023, approximately 690,000 overnight visitors stayed in paid accommodation across Central Coast. Benchmarking with comparable coastal visitor destinations indicates there is scope to Central Coast to significantly grow its share of overnight visitors.

The most common accommodation type stayed in was friends' relatives' properties, reflecting the high proportion of visiting friends and relatives travel to the region. Only 38% of overnight visitors stayed in paid accommodation, of which the most popular types are holiday houses or units and standard hotels or motels.

EXECUTIVE SUMMARY

SUPPLY AND DEMAND

Supply of Accommodation

An audit of Central Coast's accommodation supply identified 76 commercial accommodation establishments and a total supply of 2,696 rooms. This represents 21% of total room supply across all accommodation typologies (commercial and private). The majority of commercial accommodation supply are hotels and resorts, motels and serviced apartments.

Existing accommodation stock is concentrated in The Entrance and Northern Lakes and Headlands (incl. Terrigal) sub-regions, which both contain a diversity of accommodation typologies. The Hinterland represents only 2% of room supply, which is primarily comprised of motels.

Overall, commercial accommodation in Central Coast requires reinvestment to meet visitor expectations of quality and there are gaps in the supply of accessible rooms, luxury and boutique offerings, branded hotels and chains and experiential accommodation. These typologies have risen in popularity, with their availability becoming an expectation of visitors.

At the time of the audit – there were three accommodation developments under construction in Central Coast, which will enhance the vibrancy and diversity of the accommodation landscape in the region. These developments include:

- A 130-room hotel in Gosford;
- A 86-room hotel extension to the Mingara Recreation Club in Tumbi Umbi; and
- A 17-room boutique hotel in Mount White.

Additionally, four accommodation proposals were identified in the planning stage, including those identified as part of the Gosford Waterfront Development Plan and Gosford Bowling Club Development.

Demand for Accommodation

Market research undertaken in 2022 to understand accommodation preferences identified that the Australian visitor market highly values accommodation quality. The most preferred accommodation types identified are self-contained houses and units, resorts, luxury hotels and caravan/holiday parks. Expanding and diversifying the accommodation supply in Central Coast to meet these preferences is essential for growing the Central Coast visitor economy.

Visitation projections forecast a 1.65 million increase in overnight visitation in the 10 years to 2035, with visitation expected to reach approximately 3.35 million overnight visitors per year at the end of the period. Demand for overnight visitor accommodation will continue to grow alongside visitation.

Based on visitation projections, it is estimated that between 1,100 and 2,900 additional rooms will be required across the Coast by 2035. This should be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

Investment in accommodation needs to consider the following opportunities for Central Coast:

- Internationally Branded Luxury / Upscale Hotels
- Health and Wellness Spa or Retreats
- Eco-tourist Resorts
- Tourist Parks
- Self-contained Apartments
- Resort

EXECUTIVE SUMMARY

STRATEGIC DIRECTION

Overview

Two strategic directions have been identified to guide investment attraction and facilitation of visitor accommodation opportunities in Central Coast. These are shown adjacent.

Investment facilitation is a shared responsibility across economic development, strategic planning and statutory planning areas within Council.

Strategic Direction 1:

Facilitate investment in new ageing accommodation product aligned to the needs of Central Coast.

Rationale

Central Coast has not attracted the same level of investment in contemporary high-quality accommodation when compared to other regions such as Newcastle and Wollongong. The demand modelling for accommodation investment in Central Coast highlights a substantial need for new bed spaces to meet future demand.

Central Coast Council should focus on supporting investment in large scale accommodation which would add critical bed supply to the region as well as new and experiential accommodation which improves the brand reputation of Central Coast.

In addition to attracting new establishments there is opportunity to repurpose existing motel stock to meet market need and also refurbish existing hotel and resort accommodation.

Strategic Direction 2:

De-Risk investment in accommodation in Central Coast

Rationale

This strategic direction identifies actions to strengthen the attractiveness of visitor accommodation investment in Central Coast and to strengthen current business conditions for accommodation businesses. Areas of focus include supporting visitor accommodation investment in appropriate rural locations, improving seasonality of visit through events and packaging of tourism product with accommodation operators.

Section 1. Introduction

INTRODUCTION

PROJECT BACKGROUND

Central Coast Council (Council) engaged Urban Enterprise to undertake an Accommodation Futures Study and Development Action Plan.

The project responds to the directions of Council's *Economic Development Strategy 2040* and *Destination Management Plan 2022*, which identified the need for new visitor accommodation across the Central Coast as a strategic priority to support tourism growth.

This Plan will provide a detailed analysis of current and future visitor accommodation needs across the Central Coast, followed by a development plan to address barriers to development and encourage investment into new and existing accommodation supply.

Project Objectives

The project objectives are as follows:

- Define the unique selling point and overnight visitation drivers of the Central Coast that make it a strategic location for visitor accommodation investment.
- Understand the current and future visitor accommodation needs across Central Coast.
- Identify the gaps in visitor accommodation supply.
- Identify the key markets segments for visitor accommodation.
- Identify the barriers to visitor accommodation development within the Central Coast.
- Provide recommendations to resolve constraints to development.
- Encourage investment into new and existing visitor accommodation supply.
- Develop planning pathways to increased eco-accommodation development.

Project Approach & Stakeholder Engagement

The Study was informed by consultation with internal and external stakeholders.

Central Coast Council

- Strategic Planning, Economic Development, Tourism and Events, Infrastructure

Industry

- Business NSW
- Accommodation Providers
- Tourism Operators

External

- University of Newcastle & Hunter TAFE
- Developers: ALAND,
- Darkinjung Land Council

Section 2. Background & Context

BACKGROUND & CONTEXT

ABOUT THE CENTRAL COAST

The Central Coast region is located 83km north of Sydney CBD and is bounded by Lake Macquarie LGA to the north, and Northern Beaches and Hornsby LGAs to the south. It contains the two major centres of Gosford and Wyong.

The Central Coast's unique environment and proximity to the Hunter and Sydney attracts people to the region to live and work. As of 2023, the Central Coast is home to 348,379 residents.

The Central Coast includes unique natural environments such as ocean foreshore, coastal lakes, rivers, estuaries, lagoons, valleys and mountains. These features have created corridors that have shaped the region's development. National parks, State forests, bushland, beaches and waterways occupy over half the region.

The region supports a variety of industries, including health care, retail, hospitality, education and training, construction and tourism. The region's tourism sector is worth around \$880 million annually, which makes up around 9% of the total tourism expenditure in regional NSW. The Central Coast can leverage its natural assets and proximity to Sydney to generate more jobs and economic activity from tourism.

Location and Connectivity

Central Coast's large population base is dispersed across the region. Gosford is the main population and service centre, however a large proportion of the population is located in smaller towns and settlement throughout coastal and hinterland areas.

Road , Rail and Ferry Access

Central Coast is serviced by two major arterial roads: Pacific Motorway (M1), Central Coast Highway, Pacific Highway, Doyalson Link Rd.

The Central Coast and Newcastle Line that runs through Central Council provides rail connectivity to Sydney and Newcastle, with stations at Gosford, Wyong, Tuggerah and Way Woy.

Palm Beach Ferries operate daily services between Sydney (Palm Beach) and Ettalong Beach.

A network of buses connects towns within the Central Coast, however services are not accessible in some of the Coast's smaller towns.

Air Access

The nearest major airports from Central Coast include:

- Newcastle Airport – 1.5 hours drive from Gosford (106km); and
- Sydney Airport – 1.5 to 2 hours drive from Gosford (94km).

Figure 1 :
Central Coast Context Map



Source:
Adapt NSW, Climate Change in Central Coast
ABS Census of Population and Housing,
Community and Economic Profile of the Central Coast LGA, Profile Id, April 2024.
ABS Business Counts, June 2023

ERP 2023	FORECAST POPULATION 2041
351,934	404,265 (+0.8%)
LOCAL JOBS	BUSINESSES
133,045	24,481
TOP EMPLOYER	LABOUR FORCE
Health Care and Social Assistance	158,302
TIME TO AIRPORT (by Car)	UNEMPLOYMENT RATE
Sydney: 90 mins Newcastle: 45 mins	2.9% (March 2024)

BACKGROUND AND CONTEXT

CENTRAL COAST POPULATION AND LABOUR MARKET INDICATORS

Labour Force Overview

There were 170,300 people employed in Central Coast as of 2021. Due to the older age profile of residents, Central Coast has a relatively low labour force participation rate of 59.5%.

Central Coast has a very low unemployment rate of 2.9%, which is likely driven by this low level of labour force participation. Despite this, youth unemployment is high and growing at 6.2%. Younger cohorts are typically more likely to be employed in tourism and hospitality.

Employment Growth within the Accommodation and Food Services Industry

As of February 2024, there are approximately 7,600 jobs in the 'Accommodation and Food Services' sector within the Central Coast.

Employment in the sector has declined by 40% since 2019. The region has performed poorly compared to similar coastal destinations and Regional NSW more generally.

These trends indicate that the hospitality and accommodation sector has not recovered post covid compared to other destinations and there may be a requirement for Government to be proactive in economic and business development to support future growth.

Source:
Industry employment by sex: ABS,
2021 Census of Population and
Housing based on Place of Work.

Figure 2 :
Employed persons in 'Food and Accommodation Services Industry' (ANZSIC),
Central Coast (SA4) vs. Benchmarked Labour Market Regions, 2019 to 2024

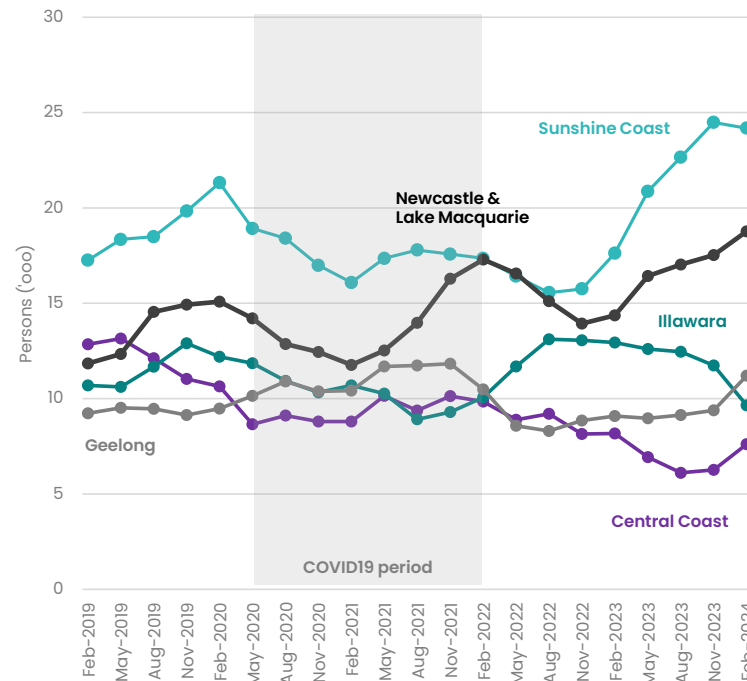


Figure 3:
Central Coast LGA Key Labour Force
Indicators 2023

POPULATION (15+)	EMPLOYMENT
294,400	170,300
UNEMPLOYMENT RATE	EMPLOYMENT TO POPULATION RATIO
2.9% (March 2024)	78.2%
PARTICIPATION RATE	YOUTH UNEMPLOYMENT RATE
59.5%	6.2% (+2.7%)

BACKGROUND AND CONTEXT

THE CENTRAL COAST TOURISM SUBREGIONS

Central Coast is one of the largest and most complex LGAs in Australia in terms of population, visitation and geographic dispersal of visitor nodes. Investment in visitor accommodation needs to respond to the unique attributes of sub regions within Central Coast.

The following subregions have been formulated for the purposes of the accommodation study. These areas have been informed by:

- Descriptions of the marketing strategy subregions;
- Existing visitor distribution (see figure attached);
- Landscape and townships characteristics;
- Access and transport routes; and
- Existing visitor markets and tourism offerings.

The subregions are mapped on the following page.

1 – Gosford and Surrounds

Key Townships: Gosford

This subregion includes the main centre of Gosford and the Somersby to Erina Corridor, making it the most populated area in the Central Coast.

The key drivers of visitation to the region include the Gosford Waterfront, Sporting Events at the Gosford Stadium, Gosford Hospital, Regional Galley, University and TAFE Campus

This sub-region is characterised medium to high density neighbourhoods, civic uses, education, health and high-order employment opportunities, speciality retail, art and culture and genuine housing choice.

2 – The Entrance and Northern Lakes

Key Townships: The Entrance, Toukley, Budgewoi

This sub-region includes the popular coastal towns of The Entrance, Toukley, and Budgewoi.

The Entrance is a popular destination for both day-trippers and holidaymakers, known for its pelican feeding, waterfront promenades, and vibrant seasonal festivals. Toukley and Budgewoi offer serene lakeside settings, ideal for water activities like fishing, boating, and kayaking.

3 – The Headlands (Terrigal and surrounds)

Key Townships: Terrigal, Avoca Beach, Forrester's Beach

Central Coast's main tourism town, Terrigal, as well as the surrounding Avoca Beach and Forrester's Beach.

The headland attracts visitors for its array of iconic beaches, watersports and activities, boutiques, cafés, markets, ice cream parlours, hotels, bars and dining.

The upscale restaurants and bars located in the sub-region contribute to the vibrant night time economy.

4 – The Peninsula

Key Townships: Woy Woy, Umina Beach, Ettalong Beach

Known for its laid-back coastal charm, this area offers a blend of natural beauty, local culture, and convenient access to Sydney. The region is appealing as a destination for weekend getaways and short breaks.

Woy Woy serves as a key gateway to the Central Coast, with its scenic waterfront, marina. Umina Beach and Ettalong Beach are favored for their pristine beaches, calm waters, and family-friendly atmosphere, ideal for swimming, picnicking, and beachfront dining.

The region also boasts a vibrant local food scene, with weekly markets, fresh seafood, and waterfront cafes.

The Bouddi National Park Coastal Walk is also a major driver of visitation.

5 – Wyong and Tuggerah

Key Townships: Wyong and Tuggerah

Significant employment land areas are located within the corridor surrounding the centre, including Tuggerah Business Park, Tuggerah Straight and North Wyong.

Wyong area is another major residential town in the Coast, home to adventure-based product and the Art House Performing Arts Centre.

Tuggerah attracts visitors for retail purposes, due to the Westfield Shopping Centre and Homemakers Centre located in the town.

6 – The Hinterland

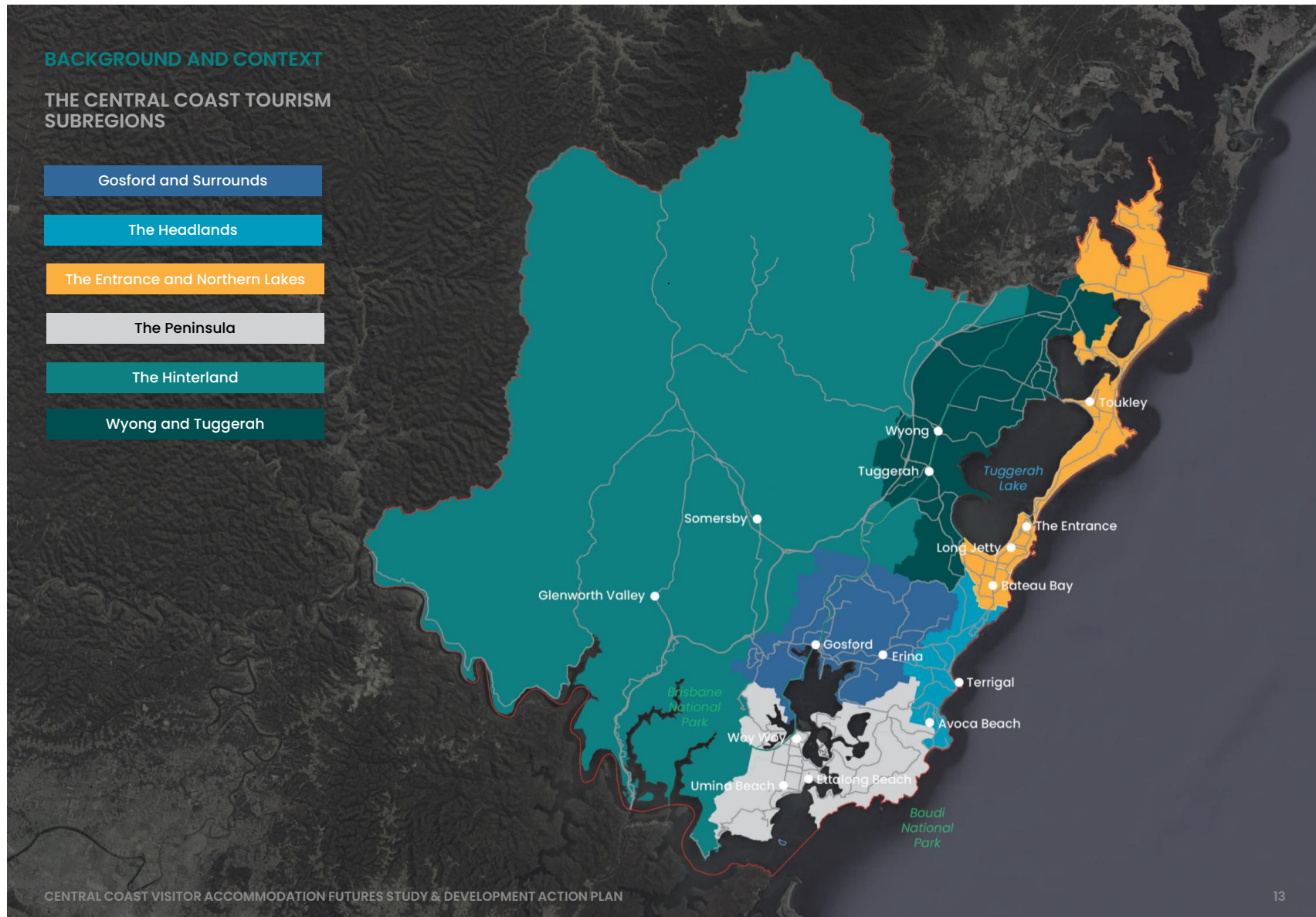
Key Townships: Mount White, Glenworth Valley, Peats Ridge, Wyong Creek,

The Central Coast Hinterland offers fresh produce, walking trails, farm gate experiences and national and state parks.

Major drawcards include the scenic and historic Tourist Drive 33 route, through the Central Coast's western bushland, and the Great North Walk.

The Hinterland's Pit-stop at hidden gems, artisan estates and embracing the lesser-known, lush hinterland and some the Coast's unique Australian animal attractions.

This region also hosts the harvest festival which is a major event in the region.



BACKGROUND & CONTEXT

THE IMPORTANCE OF VISITOR ACCOMMODATION

Essential infrastructure to grow overnight stay and visitor yield

Overnight visitors are a high yield tourism market segment. Accommodation enables longer stays and thus higher spend throughout all aspects of a trip (i.e., lodging, food and beverage, shopping, etc.) when compared to daytrip visitors.

The availability of quality, well-located, and affordable accommodation are all important deciding factors in whether a visitor chooses to stay overnight.

Accommodation is a critical asset in attracting major events

Accommodation capacity is an essential component in securing conferences and major events – as is evident by the many major venues who seek out exclusive partnerships with branded hotels.

The latest data shows a significant decline in business visitation to the Central Coast (see page 17), which can be partially attributed to current low levels of supply in the region.

Large scale accommodation in proximity to key venues, transport links and other night-time product are essential to giving the Central Coast a competitive advantage to grow business and MICE market segment.

Enabling access and improving visitor dispersal across the Central Coast

Diversified and well distributed accommodation stock helps to alleviate seasonality and disperse tourism flows throughout a destination. This is especially important in regional destinations, such as the Central Coast, which face limited public transport options.

Much of the region's untapped tourism potential is in the remote hinterland. Provision of immersive and experiential accommodation will be key into unlocking these areas.

Supporting vibrant night-time economy precincts

As people continue to live and work more flexibly, demand for a wide range of night-time recreation product is on the rise. Thus, development of the night-time economy is a strategic priority for the Greater Sydney Metropolitan Area.

The accommodation sector will play an important role in supporting this demand for nighttime product; assisting to drive overnight visitor spend directly to Central Coast's night-time precincts.

Supporting more than just tourists

The Visitor Economy expands beyond tourists travelling for a holiday and encompasses all those travelling for other reasons i.e. business, work, education and medical services.

The Central Coast, particularly Gosford, is well positioned for significant economic growth from several major developments which have or will be completed over the next few years. Some include the new University of Newcastle Campus, Gosford Hospital Expansion, Gosford Waterfront Development and many more.

There is opportunity to leverage these developments to diversify and grow overnight market segments in the Central Coast, building for a more resilient visitor economy.

Impacts on the supply and affordability of long-term rentals, key worker housing and temporary community accommodation

Airbnb and other platforms like it have increased the scale of short-term letting, placing strain on the existing housing supply. Many landlords have converted former residential tenancies into year-round short-term rental listings, making it harder for prospective renters to secure accommodation.

Current analysis of accommodation supply and market indicators strongly suggest that across the Central Coast, this issue has been exacerbated by the under supply of commercial accommodation. There are currently almost 3,600 private properties listed on Airbnb – with the ratio of private to commercial room stock sitting at 4:1 (see page 20).

Relieving the strain on commercial accommodation supply will assist in easing the demand and incentive for private rentals.

Visitor accommodation also often has an important function in providing temporary housing infrastructure for the community, especially vulnerable populations and during disaster events.

The Central Coast Housing Strategy notes a severe lack of temporary, key workers and lone house accommodation options in the Central Coast, and a progressive loss of lower cost caravan parks, motels and older boarding houses that have traditionally provided such accommodation.

BACKGROUND & CONTEXT

GOVERNMENT DIRECTIONS

NSW Visitor Economy Strategy 2030

The NSW Visitor Economy Strategy 2030 sets a target to triple 2009 overnight visitor expenditure in NSW by 2030, surpassing previous targets despite recent challenges.

Specific targets by 2030 include:

\$65 billion

Total visitor expenditure for NSW

From \$43 billion in 2019 (+51%)

\$55 billion

Overnight visitor expenditure

From \$35 billion in 2019 (+57%)

\$25 billion

Regional overnight visitor expenditure

From \$20.5 billion in 2019 (+22%)

Strategic directions to achieve these targets include increasing public and private investment in tourism infrastructure to increase visitor satisfaction with accommodation and other tourism experiences.

The Strategy's Visitor Infrastructure Framework ranks accommodation as a high priority for State investment.

Accessible and inclusive experiences and places, including accommodation, are also identified as an emerging strength and continued development focus area for the State.

Central Coast Economic Development Strategy (EDS) 2020

The Central Coast EDS 2040 sets the vision, objectives and targets, and the priority actions to build an agile, resilient and innovative economy.

Sectors identified with high growth potential for the Central Coast region, include:

- *Established Sectors:* Health Care and Wellbeing, Retail Trade, Accommodation and Food Services and Construction
- *Emerging Sectors:* Education Innovation and Research, Advanced Manufacturing, Sustainable and Green Industries, Visitor Economy, Entrepreneurship and Commercial Office growth in the CBD.

Future accommodation development will need to support these industries and capture new market segments.

Central Coast Night-Time Economy (NTE) Discussion Paper and Action Plan 2023

The Central Coast NTE action plan identifies over 40 interventions and project concepts to enhance and activate night-time economy precincts in the Central Coast.

These precincts include Terrigal, Gosford, Ettalong Beach, The Entrance, Woy Woy, Long Jetty, Erina.

Implementation of the action plan is expected to boost demand for night-time economy uses, and thus, drive more overnight stays.

Gosford and Terrigal are highlighted as priority precincts for NTE development due to their established business bases and opportunities to leverage major incoming investment.

Central Coast Destination Management Plan (DMP) 2021

The Central Coast DMP provides the blueprint for visitor economy development until 2025. The Plan found large-scale accommodation is required to support growth in the events sector and to increase yield from visitors.

At the time of publishing, analysis estimated demand for up to 3,854 additional commercial rooms across the Central Coast.

Accommodation of all types were required at all destinations to support growth and meet current capacity constraints. Priority destinations for accommodation development include **Gosford and the Hinterland**.

Central Coast Marketing Strategy

The Central Coast Marketing Strategy provides the tourism branding and marketing directions for Central Coast.

The Strategy establishes five tourism subregions, including (1) The Peninsula, (2) The Hinterland, (3) The Headlands, (4) The Lakes and (5) The Central Business Districts.

It will be important for future development to align with the destination branding, market positioning and accommodation preferences of the target markets segments set out in the Strategy for each of the subregions.

BACKGROUND & CONTEXT

MACROECONOMIC DRIVERS & INVESTMENT CLIMATE

Completion of State Government Infrastructure

A number of major State Government infrastructure projects will be completed the next 3 to 4 years, including the new Western Sydney Airport in 2026.

This will provide a major stimulus to grow overnight visitation to Central Coast, especially from international, interstate and business visitor market segments

Hotel projects delays by rising construction and financing costs

Rising construction and finance costs have delayed many hotel projects, resulting in a reduction in forecast supply over the next three years.

Recent Colliers data estimates that approximately 2,700 hotel room openings planned between 2023 and 2026 have been cut from the development pipeline across Australia[^].

Private sector activity is expected to slow until economic conditions improve (i.e. decrease in interest rates and construction cost, and older hotels exiting the market).

Tourism labour shortages

There are 16,963 tourism-related vacancies across Australia as of June 2023. This is 35% lower than the peak in June 2022, but still well above (176%) the pre-pandemic average level (9,646 tourism-related vacancies on average over 2018 and 2019).

Accommodation and hospitality managers was also a key visitor economy occupation noted to be having skill shortages on the Jobs and Skills Australia (JSA)'s Skills Priority List (SPL) 2023.

The outlook is positive, with vacancies expected to drop with return of international workers and successful state government initiatives.

Branded and chain accommodation operators

Branded and chain hotel operators continue to dominate the accommodation sector, leveraging economies of scale through extensive franchising networks. These typologies are driven by consistent quality standards among both leisure and business travellers.

This model allows large chains to benefit from centralised resources, such as marketing, procurement and technology, with reduced operational costs and brand consistency in the market.

A growing trend within this segment is the rise of soft branding, where independent hotels affiliate with larger hotel collections. An example of this is Ascent Hotel Collection by Choice Hotels. These soft branded properties retain their 'boutique' identity while gaining access to global distribution networks, loyalty programs and the operational support of larger chains.

Mixed use developments

Hotel accommodation delivered through mixed use development, often in combination with retail, office or residential space, has gained popularity around the world in the past decade.

Mixed-use projects can greatly improve the financial viability of a project. This can be through staging (i.e. using capital raised from sale of residences to construct the hotel) but also through design and leveraging the best of each asset class (i.e. retail activation on the lower floors and utilising higher levels for hotel rooms with premium views).

This approach can also enhance the visitor experience. The co-location of accommodation with offerings such as retail, conferencing and entertainment can attract a wider range of travellers. The convenience of proximity for visitors can boost financial returns for each component.

This approach has successfully been utilised to deliver new hotels including the QT Hotel in Newcastle. The VOCCO Hotel proposed in Gosford is also being constructed as part of a mixed-use precinct.

Sources:

[^]'Soaring construction costs put 1000 hotel rooms on ice' Larry Schlensinger, Financial Review, June 2023.

Tourism workforce report – A status update on the workforce in Australia's visitor economy, TRA, October 2023

BACKGROUND & CONTEXT

LOCAL INSIGHTS

Local Industry Insights

This study was informed by consultation with key tourism and accommodation industry stakeholders in Central Coast, including:

- Accommodation Operators
- Investors and developers
- Tourism Operators

The key barriers to investment identified through the stakeholder consultation process are:

- Long and complex planning processes.
- There are few incentives offered to operators to attract and retain investment.
- There is a perceived lack of transport and services infrastructure capacity to sustain sufficient levels of visitation.
- Limited supply of serviced, unconstrained land is a key barrier to investment.
- Issues and barriers to entry that many investors face including cost and availability of land, cost of labour and permit processes.

Barriers to Reinvestment

The main barriers to reinvestment in existing accommodation stock in Central Coast are financial constraints, regulatory challenges and market uncertainty. Many properties are ageing and would require substantial capital to refurbish. Lacking availability of suitable land and inconsistent occupancy rates and returns often disincentivise reinvestment. Consultation with operators indicated that because of this, an iterative approach to reinvestment is preferred, whereby minor improvements are made each year.

Construction cost is also considered a major barrier for investors and makes feasibility for larger scale projects difficult.

Despite these barriers, there are notable expansion opportunities for those willing to reinvest in existing accommodation stock.

Enhancing amenities, upgrading technology, and aligning with contemporary market trends such as eco-friendly or boutique offerings can attract a broader demographic, including the growing market of domestic tourists seeking unique experiences. Opportunities to leverage soft branding strategies or partnerships with established hotel chains can also make reinvestment more viable and appealing to both current operators and potential investors.

Employment Capacity

The accommodation industry's growth in the Central Coast is constrained by limited employment capacity.

To enhance the region's employment capacity, it's vital to create more opportunities for local residents within the accommodation sector and provide targeted efforts in training and upskilling the local labour force. Stronger partnerships between education institutions and the accommodation industry are essential to ensure a steady supply of skilled workers. Examples such as Torrens University's hotel school or Newcastle International Hotel School have been effective and could be emulated in the Coast.

Improving connectivity and collaboration between educational institutions and the hotel industry will be critical in building a sustainable workforce and will also help to improve the competitiveness of Central Coast's accommodation industry.

Feasibility and Business Planning

The key considerations for accommodation feasibility, as identified through consultation with industry and key stakeholders include:

- The existing visitor market, including seasonality, competition and demand drivers like tourism products and local events.
- Brand positioning to determine the target markets, which influences decisions relating to design, amenities and pricing.
- Upfront build costs, which include land acquisition, construction and compliance with local policies and regulations.
- Operational costs, including staffing, maintenance, utilities and marketing.
- The availability and capacity of tourism infrastructure to facilitate future expansion or future growth in the visitor market.
- Economic conditions that are likely to affect future occupancy and target markets.

Source:

National Visitor Survey – Stopover Accommodation by Region/SA2, TRA, 2019 to 2023.

^'Soaring construction costs put 1000 hotel rooms on ice' Larry Schlensinger, Financial Review, June 2023

BACKGROUND AND CONTEXT

WHAT MAKES A DESTINATION ATTRACTIVE TO INVESTORS?

How Do Investors Select Locations For New Tourist Accommodation Development?

Tourist accommodation investors and operators carefully choose development sites to ensure investments are profitable, competitive and remain viable in the long term.

The selection criteria presented adjacent were identified based on consultation with the tourism industry and existing operators and are displayed adjacent.

High Visitor Volumes and Strong Market Performance

Destinations with established visitor markets, high visitor volumes and a demonstrated history of robust market performance are highly attractive locations for accommodation investment.

These areas typically benefit from established tourism infrastructure and a diverse range of attractions that drive demand throughout the year.

Located in Proximity to Amenities and Attractions

Availability of services and points of interest are a key factor in where visitors choose to stay. It is also a crucial determinant of what types of markets a potential operator is likely to attract.

Sites located within a 5-minute walking distance to amenity, particularly food and beverage options, are highly advantageous in attracting visitors.

For this reason, established precincts that contain retail, dining options, nighttime economy product and key services like banks and medical services, are attractive for accommodation investment.

Located Adjacent to Key Drivers of Business Travel Demand

Attracting mid-week visitation is critical for sustaining year-round operations for accommodation providers. Off-peak visitation is primarily driven by the business market segment. Areas that exhibit the following characteristics are ripe for business travel:

- Office towers, business and industrial parks
- Sporting facilities & stadiums
- Diversified industry base
- Major infrastructure projects
- Conference and event spaces
- Shopping centres
- Universities or other tertiary education providers
- Hospital & medical precincts

Supported by a Large Population Base and Skilled Labour Force

Sites that are in proximity to a large permanent population are critical for supporting the accommodation sector, especially if the visitor economy and accommodation industry already exists there are a pool of existing skilled and experienced workers to draw on. In the case of Central Coast, its large population base provides an indication that it can support a large visitor economy workforce.

Located in Areas with Low Existing Competition

Locations that are under-supplied with quality new accommodation offerings present a prime opportunity for investors, as the lack of competition allows for a significant capture of the visitor market.

The profile of existing and proposed supply will inform whether there is opportunity to target specific markets, through positioning and establishing USP's.

This also includes consideration of local legislation and its impact on competition including AirBnb.

Land Availability and Governance

Land availability and governance are crucial factors in site selection, as they directly impact the feasibility and cost of accommodation developments.

Key considerations include:

- Planning restrictions (i.e. zoning).
- Landscape features and other natural characteristics.
- Availability of essential infrastructure i.e. water, electricity, gas, etc.
- Land cost and potential for long term value appreciation.

BACKGROUND AND CONTENT

STATE ENVIRONMENTAL PLANNING POLICY

Policy Impacting Visitor Accommodation Development

This section provides an overview and assessment of the local and state policies that relate to accommodation development.

The policies and reforms that have been reviewed as part of this process are listed below:

State Policies

- Vibrancy Reforms
 - Special Entertainment Precincts
 - 24 Hour Commissioner
- Agritourism Planning Changes
- Precincts – Regional SEPPs – Gosford
- Discussion paper on Short-and Long Term Rental Accommodation (STRA)
- Practice Note PN 09-006 “Providing for tourism in Standard Instrument Local Environment Plans”

Local Policies

- Central Coast LEP
- Zoned Land Supply

Vibrancy Reforms

The management of Sydney’s night-time economy has historically been criticised for being too heavily centred on the consumption of alcohol and associated violent incidents. The decision to roll back some of these laws in 2020 has provided the foundation to invigorate the night-time economy and achieve a better balance between safety and vibrancy.

In 2023, the NSW State Government implemented amendments to 24-hour economy legislation, with the aim to boost NSW’s night economy for the benefit of live music, dining and creative sectors and workers, to bring vibrancy back to NSW’s nighttime economy and community.

The reforms include the broad-based introduction of Special Entertainment Precincts to support live entertainment, via extended trading hours for live music venues and favourable noise controls that provide operational certainty for venues, neighbouring residents and businesses.

This framework will also be strengthened by these measures:

- From mid-2024, clearer sound governance: Liquor & Gaming NSW will manage entertainment sound complaints for licensed venues and impose a higher threshold for these complaints, and councils will be empowered to set sound standards and manage unlicensed venues
- Additional trading hour extensions for live music venues in Special Entertainment Precincts, including 2 hours on nights they offer live music, and 1 hour on other nights
- New powers for councils to automatically adjust trading hours on development consents to support diverse late-night offerings
- Strengthening governance to support safety and collaboration.
- A new support service for councils interested in establishing a Special Entertainment Precinct.

There will also be new planning rules introduced to empower Councils to protect their creative and cultural spaces and create new ones. Changes to planning policy are being developed to encourage commercial or residential developers to include performance or creative spaces. This will increase employment opportunities for creative workers and make these areas more vibrant.

NSW is the first jurisdiction in the world to appoint a 24-Hour Economy Commissioner. Under the 24-Hour Economy Commissioner Act 2023, the Commissioner’s role is a statutory appointment. This means the Commissioner’s remit has expanded from Greater Sydney to all of NSW.

Source:

National Visitor Survey – Stopover Accommodation by Region/SA2, TRA, 2019 to 2023.

*Average of Benchmarked Destinations includes the LGAs of: Byron, Newcastle, Sunshine Coast and Wollongong.

BACKGROUND AND CONTEXT

STATE ENVIRONMENTAL PLANNING POLICY

Agritourism Reforms

The NSW Government has implemented a range of planning scheme reforms aimed at making it easier for farmers to use their land for tourism activities, such as farm experiences, cellar doors and farm stays. These changes are outlined below.

Camping

You can host campers on your farm without planning or building approval if you meet certain requirements, including:

- tents are 6 m from any building, caravan, annex or campervan.
- you host no more than 20 people at any one time, on no more than 21 days for each visit.
- your farm is at least 15 ha.

Provide a rural experience

You can host events, such as tours, weddings, conferences and other functions. To do this, you must meet certain requirements, including:

- events (except tours, school visits and horse-riding tours) have a maximum of 50 people, and take place on no more than 52 days each year.
- events take place between the hours of 8 am and 6 pm Sundays to Thursdays and public holidays, and 8 am and midnight Fridays and Saturdays.
- neighbours are given at least one week's notice before the use starts.

Fast-track new buildings

You can build a new structure to sell produce from your farm through a fast-track approval if you meet certain requirements, including:

- the building is no larger than 200 m² and up to 7 m or 10 m in height, depending on your property size.
- the building is set back from certain neighbouring agricultural uses.
- there are no more than 100 visitors at any one time, excluding for fruit and produce picking.

Run a small farm-gate business

You can use an existing building on your farm to set up a business such as a store or café, or for tastings or workshops, to highlight your land's produce. To do this, you must meet certain requirements, including:

- use a maximum of 200 m² of the building.
- operate between the hours of 8 am and 5 pm Sundays to Fridays and public holidays, and 7 am and 5 pm on Saturdays.
- host a maximum of 100 visitors at a time, excluding for fruit and produce picking.
- provide parking on your property.

Precinct Regional SEPP – Gosford

State Environmental Planning Policy (SEPP) (Precincts – Regional) 2021, which establishes the statutory controls that recognise the state-significant importance of Gosford as a regional capital.

The SEPP provides the overall zoning and development controls within Gosford City Centre. The SEPP establishes where land-use zones apply, land uses that are permissible within each zone in the city centre and the primary controls for development.

Agritourism is now permitted with consent in all RU1 Primary Production, RU2 Rural Landscape and RU4 Primary Production Small Lots zones in local environmental plans and in other zones councils have nominated.

Source:

National Visitor Survey – Stopover Accommodation by Region/SA2, TRA, 2019 to 2023.

*Average of Benchmarked Destinations includes the LGAs of: Byron, Newcastle, Sunshine Coast and Wollongong.

The other State Environmental Planning Policies that apply to Central Coast and need to be considered for any future accommodation development are as follows:

- Housing SEPP
- Transport and infrastructure SEPP
- Primary production SEPP
- Biodiversity and conservation SEPP
- Resilience and hazards SEPP
- Industry and employment SEPP
- Resources and energy SEPP
- Planning systems
 - Planning systems SEPP
- Precincts SEPPs: Eastern Harbour City SEPP, Western Parkland City SEPP, Central River City SEPP and Regional SEPP
- Codes SEPP

BACKGROUND AND CONTEXT

CENTRAL COAST LEP

The Local Environmental Plan (LEP) is the primary legal planning document for guiding land use and planning decisions made by Council.

The following provides an overview of the key clauses of the LEP that relate to accommodation development.

Zoning

The following provides an overview of the existing planning zones that currently apply under the Central Coast Local Environment Plan:

- Residential Zones (R1, R2, R3): These zones comprise the majority of accommodation stock (41%), including Bed & Breakfasts, Caravan Parks, Motels, Resorts, and Serviced Apartments, tend to be low-scale.
- Employment & Special Purpose Zones (B3, E1, E2, E3, SP3, SP4): These zones mainly feature larger-scale accommodation types, such as Hotels & Resorts, characterised by higher density developments with more supporting amenities.
- Rural Zones (RU1, RU2, RU3): These zones tend to facilitate lower-scale accommodation types that are compatible with rural locations, such as eco-cabins, farm stays, and health and wellness retreats, typically on larger lot sizes.

Schedule 1 – Additional Permitted Uses

'Additional Permitted Use' (APU) allows a specific land to be used for a purpose beyond those already permitted under a given land use zone.

Schedule 1 – Additional Local Provisions

7.9 Caravan parks and manufactured home estates.

5.13. Eco-tourist facilitation

(i) The objectives of this clause are as follows—

- (a) to maintain the environmental and cultural values of land on which development for the purposes of eco-tourist facilities is carried out,
- (b) to provide for sensitively designed and managed eco-tourist facilities that have minimal impact on the environment both on and off-site.
- (2) This clause applies if development for the purposes of an eco-tourist facility is permitted with development consent under this Plan.
- (3) The consent authority must not grant consent under this Plan to carry out development for the purposes of an eco-tourist facility unless the consent authority is satisfied that—

(a) there is a demonstrated connection between the development and the ecological, environmental and cultural values of the site or area, and

(b) the development will be located, constructed, managed and maintained so as to minimise any impact on, and to conserve, the natural environment, and

(c) the development will enhance an appreciation of the environmental and cultural values of the site or area, and

(d) the development will promote positive environmental outcomes and any impact on watercourses, soil quality, heritage and native flora and fauna will be minimal, and

(e) the site will be maintained (or regenerated where necessary) to ensure the continued protection of natural resources and enhancement of the natural environment, and

(f) waste generation during construction and operation will be avoided and that any waste will be appropriately removed, and

(g) the development will be located to avoid visibility above ridgelines and against escarpments and from watercourses and that any visual intrusion will be.

A review of accommodation development across Central Coast was undertaken, for each of the planning zones in the LEP. Key findings are detailed below.

Prevalence of the accommodation in residential areas

An interesting finding from the exercise is that it shows residential zone (R1, R2, & R3) are doing much of the heavy lifting with providing accommodation – 41% of the accommodation businesses on the list are within one of those zones. These zones are intended to provide housing and other essential services to meet the needs of residents, so the prevalence of short-term accommodation in these locations is somewhat at odds with the primary purpose of the zones.

Floor Space Ratio (FSR) and Building Height

Higher FSR and building heights are associated with zones E1, E2, and B3, indicating higher density developments. For example, The Entrance has FSRs up to 3:1 and building heights up to 28m.

Heritage Assets

A few locations, such as the Bay View Hotel in Woy Woy and the Gosford Hotel in Gosford, are heritage-listed.

Additional Permitted Uses

The only example of an additional permitted use is at the Palms in Avoca (a Caravan, Camping Grounds & Holiday Park)

BACKGROUND AND CONTEXT

SHORT AND LONG TERM ACCOMMODATION

Discussion Paper on Short- and Long-term Rental Accommodation: Review of Regulations and Supply in New South Wales

The NSW Department of Planning, Housing and Infrastructure's Discussion Paper on short-term and long-term rental accommodation examined the growing impact of short-term rentals on housing affordability and availability. It found that the increase in short-term rentals, such as those listed on platforms like Airbnb, is reducing the supply of long-term rental properties, which drives up rental prices and affects housing affordability. The paper highlights the need for clearer regulations and enforcement to balance the benefits of short-term rentals with the need for affordable long-term housing.

Key findings include the recognition that short-term rentals can be more profitable for property owners than long-term leases, leading to fewer properties available for permanent rent. The paper proposes several policy options, such as capping the number of days for short-term rentals, introducing registration requirements, and enhancing transparency to manage these impacts effectively.

Practice Note PN 09-006 "Providing for tourism in Standard Instrument Local Environment Plans"

The practice note has been prepared to provide guidance to councils on providing tourism opportunities in their principal local environmental plans prepared under the Standard Instrument.

It includes an outline of the tourism industry context for NSW, approach to tourism strategy preparation and consideration of tourism related uses across various zones.

The practice note for tourism is almost 15 years old and doesn't align to current conditions in tourism and the economic climate. Data included in the practice note is heavily outdated as is reference to historic RTOs that are no longer in place.

BACKGROUND AND CONTEXT

CASE STUDY ACCOMMODATION INVESTMENT ATTRACTION: NEWCASTLE

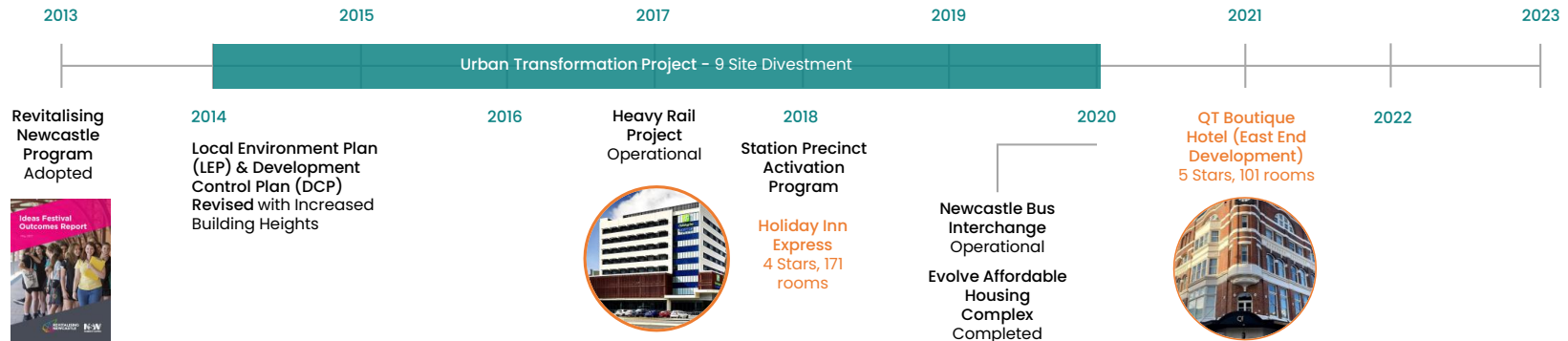
Source:
Newcastle Urban Transformation Transport Program Benefits Realisation Summary Report, EY, published Aug 2021.
"Average of Benchmarked Destinations includes the LGAs of: Byron, Newcastle, Sunshine Coast and Wollongong.

Key Strategies

- State Government lead urban renewal project including direct contribution of ~\$650M
- Holistic investment strategy including renewed:
 - Public Transport (Rail, Light Rail, Bus)
 - Affordable Housing
 - Public Spaces, and
 - Pedestrian/Cycling Linkages
- Strategic land acquisitions and sales over time
- Effective use of Public-Private-Partnerships to deliver commercial/residential
- Adaptive Use of Heritage Assets
- Reformed planning policies and processes to facilitate high density, mixed-use and multi-staged developments

Key Outcomes

- Three new 4+ star hotels developed
- As TRA data shows, commercial visitor nights has exceeded pre-pandemic levels by 11%.
- Employment growth has almost doubled initial state government projections.
- Increased investment activity in the city centre between 2014 and 2020, including:
 - 2,078 dwellings
 - 46,946 sqm of commercial GFA
 - 14,000 sqm of education GFA
- Light rail patronage and road through volumes higher than anticipated



BACKGROUND AND CONTEXT

COUNCIL'S ROLE IN FACILITATING INVESTMENT

The Role of Council in Facilitating Investment

Local councils play a crucial role in creating a supportive environment that attracts and retains investment.

Through strategic planning, policy, targeted incentives and relationship management, councils can streamline approval processes and reduce barriers to entry, making it easier for investors to commit to projects.

Additionally, councils can leverage their local knowledge, land assets, and partnerships with industry and government bodies to drive investment in key areas, ensuring that development aligns with community needs and contributes to long-term economic growth.

The various roles of Council in facilitating investment are described adjacent.

Table 1:
Council's Role in Facilitating Investment

Role	Description	Resource Level
Information Channel	The provision of information about a service, promotion of the Central Coast as a destination to invest, referrals to government agencies, local business or industry.	Low
Advocate	Stakeholders might choose to make representations to government agencies, businesses and or investors on matters that might be impacting on the Central Coast as a destination to invest. This may simply be writing a letter to a Minister or through a more organised campaign.	Low to Medium
Facilitator	This is a step further from advocacy where the stakeholder brings together interested parties to explore or progress an opportunity or resolve an issue affecting investment to the area.	Low to Medium
Part Funder	The organisation provides funding to another body to meet part of the cost of that body providing a function or service activity.	Medium
Asset Owner	As the owner or custodian of an asset there is a responsibility to maintain and determine future use of assets under ownership.	High
Regulator	Where there is a legislative requirement for the prescribed organisation to perform assessment, approval and compliance in accordance with legislative and regulatory structures.	High
Service Provider	The deliverer of services and projects for the benefit of the community	High

BACKGROUND & CONTEXT

KEY POINTS

- Central Coast has a population of over 350,000 people and is strategically located on the coastline of New South Wales, between Sydney and Newcastle, providing access to a market of almost 6 million people. The region contains a diverse range of unique environments including urban cities, ocean foreshore, coastal lakes and hinterland. These attributes make accommodation investment and development a prime opportunity for Central Coast.
- There are a range of objectives that can be achieved through investment in visitor accommodation, which have been recognised and supported in state and local strategic documents and policy. Visitor accommodation is important for:
 - Growing overnight stay and visitor yield;
 - Attracting major events;
 - Enabling access and improve visitor dispersal across the coast;
 - Supporting vibrant precincts; and
 - Enabling affordability in the housing market.
- Encouraging visitor accommodation development requires consideration of the factors that make a destination attractive to investors. These include historical market performance and demand drivers, existing levels of competition, the supply of visitor amenity and attractions, skilled labour; and land availability and governance.
- The key barriers to accommodation investment in the region, as identified through consultation with key tourism and accommodation industry stakeholders, include long and complex planning processes, a lack of transport and services infrastructure, land supply constraints and cost barriers to entry. The visitor accommodation development framework developed in subsequent sections of this report aims to address these barriers.
- The NSW Government has implemented a range of planning scheme reforms aimed to promote agritourism and nighttime economic vibrancy in NSW, which will be considered in the identification of accommodation opportunities for Central Coast
- A number of provisions conducive to accommodation investment are included in the Central Coast Local Environment Plan and should be promoted to investors. These include provisions relating to caravan parks and manufactured home estates, eco-tourist facilitation and additional permitted uses for purposes beyond those outlined in the specific zone. The LEP also makes provision for an SP3 Tourist zone.

Section 3. The Central Coast Visitor Economy & Markets

CENTRAL COAST VISITOR ECONOMY AND MARKETS

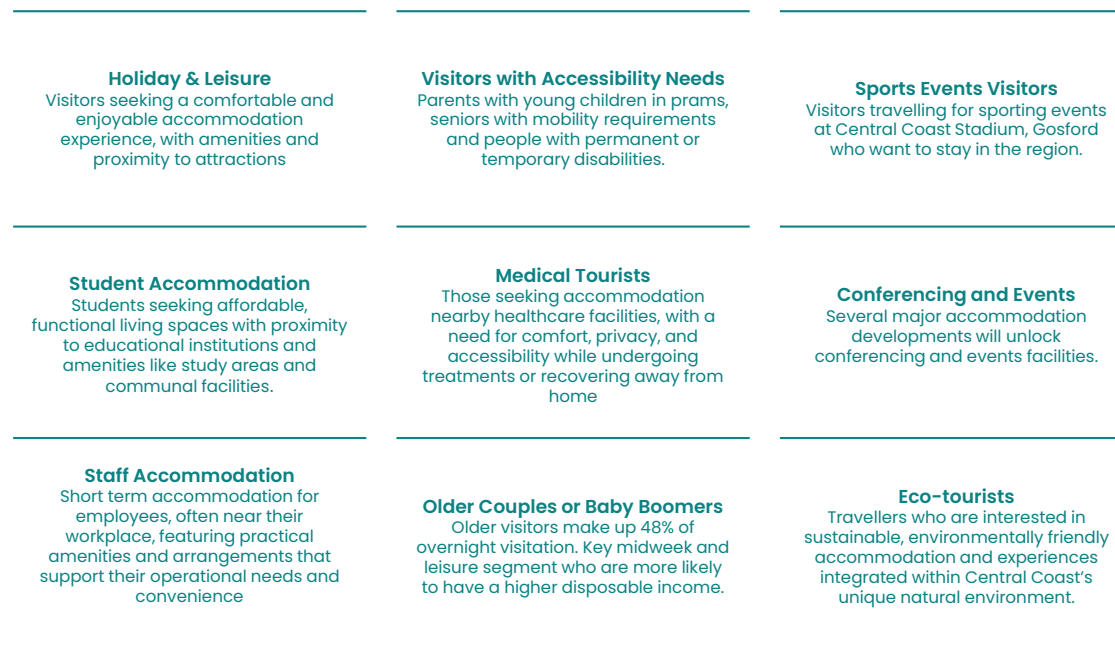
THE CENTRAL COAST TOURISM REGION & DRIVERS OF OVERNIGHT STAYS

The Central Coast has a large and growing visitor economy. The Coast's location at the doorstep of Sydney will ensure that the Central Coast continues to be choice location for the daytrip and overnight visitor markets.

The primary appeal of the Central Coast is the region's water and nature-based assets and associated recreation activities and attractions. The Central Coast includes unique natural environments such as ocean foreshore, coastal lakes, rivers, estuaries, lagoons, valleys and mountains. These features have created corridors that have shaped the region's development. National parks, State forests, bushland, beaches and waterways occupy over half the region.

Emerging strengths of the Central Coast include food and beverage and farmgate, arts, culture and heritage, events and festivals.

Figure 4:
Overview of Key Accommodation Market Segments



CENTRAL COAST VISITOR ECONOMY AND MARKETS

VISITATION

The Central Coast visitor economy is still recovering from the impacts of the COVID-19 pandemic. Overall visitation to Central Coast reached 93% of peak visitation levels in 2019.

In 2023, the Central Coast attracted 5.9 million visitors. This included 1.8 million overnight visitors (31% of total visitation) who stayed over 4.5M nights.

Visitors generated \$1.5 billion in expenditure across the region. Overnight trips accounted for 64% of this total spend.

Source:
Tourism Research Australia (TRA),
National Visitor Survey, 2010 to 2023 YE
DEC. Presented by Urban Enterprise.
*Destination NSW –Travel to Central
Coast Tourism Region Time Series, YE
June 2023

Figure 5 :
Central Coast LGA Visitor & Nights – 2015 to 2023

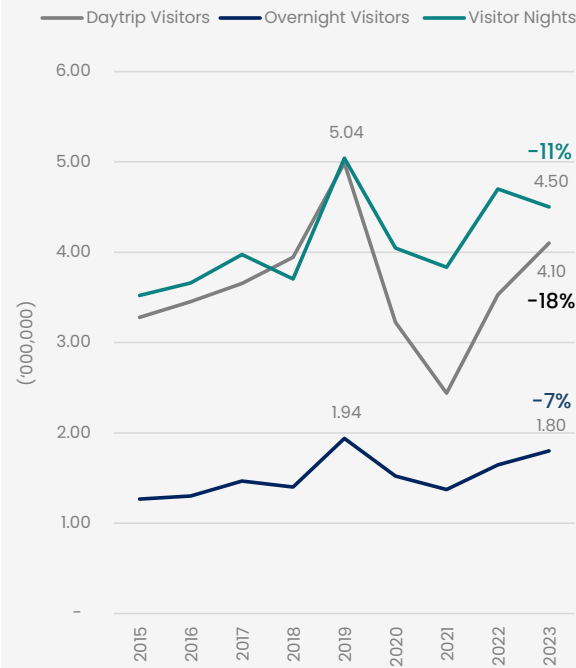


Table 2 :
Central Coast Expenditure Summary 2023

	Domestic Daytrip	Domestic Overnight
Visitors (M)	4.10	1.80
Nights (M)	-	4.50
Average Length of Stay (ALOS)	-	2.5
Expenditure (\$M)	\$529	\$950
Avg. Spend per Visitor*	\$129	\$527
Avg. Spend per Night*	-	\$211

CENTRAL COAST VISITOR ECONOMY AND MARKETS

SUBREGIONAL VISITATION

Figure 6 shows total visitation to each of the SA2s in the Central Coast.

Visitation is concentrated in the following SA2's:

- Gosford – Springfield: (16%)
- The Entrance (9%)
- Umina - Booker Bay – Patonga (7%)
- Terrigal - North Avoca (7%)
- Calga – Kulnura (6%)

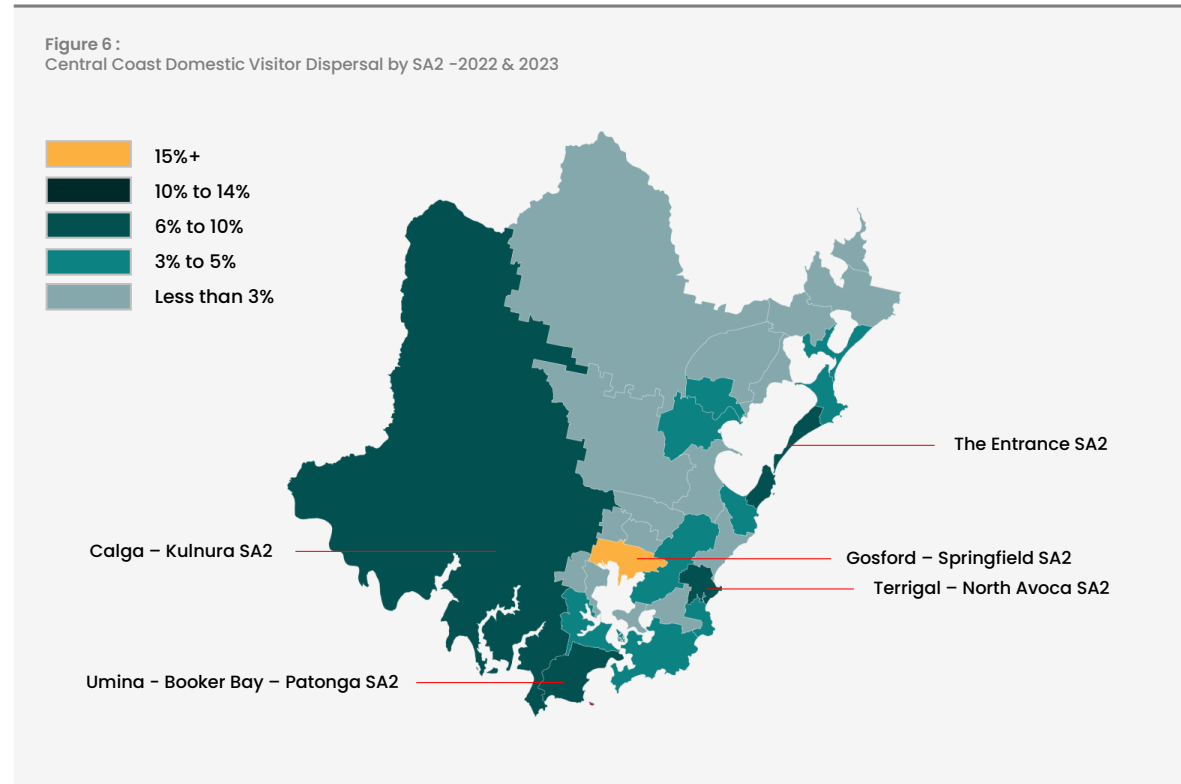
These trends demonstrate the importance of Gosford, as the key population centre, and the well-known coastal towns (Terrigal, The Entrance, Ettalong Bay), in driving visitation.

Overall, visitation is lower in the lesser-known Hinterland region, which lacks visitor-ready products, experiences, amenity and infrastructure. Closer to Sydney and other key towns in the Coast, the southern portion of the Hinterland attracts more visitors than the north.

Source:

Tourism Research Australia (TRA), National Visitor Survey, 2010 to 2023 YE DEC. Presented by Urban Enterprise.

*Destination NSW –Travel to Central Coast Tourism Region Time Series, YE June 2023



CENTRAL COAST VISITOR ECONOMY AND MARKETS

PAID ACCOMMODATION VISITORS

In 2023, approximately 690,000 overnight visitors stayed in paid or commercial accommodation across the Central Coast.

The number of visitors staying in commercial accommodation in the Central Coast has exceeded 2019 levels, growing by 35,000 (+5%) between 2019 and 2023.

However, benchmarking against comparable coastal destinations shows there is scope for the Central Coast to significantly grow its overnight visitation, and subsequently increase the region's tourism expenditure.

Source:
Tourism Research Australia (TRA),
National Visitor Survey, 2010 to 2023 YE
DEC. Presented by Urban Enterprise.
*Destination NSW –Travel to Central
Coast Tourism Region Time Series, YE
June 2023

Figure 7 :
Central Coast LGA Paid Accommodation Visitor & Nights – 2015 to 2023

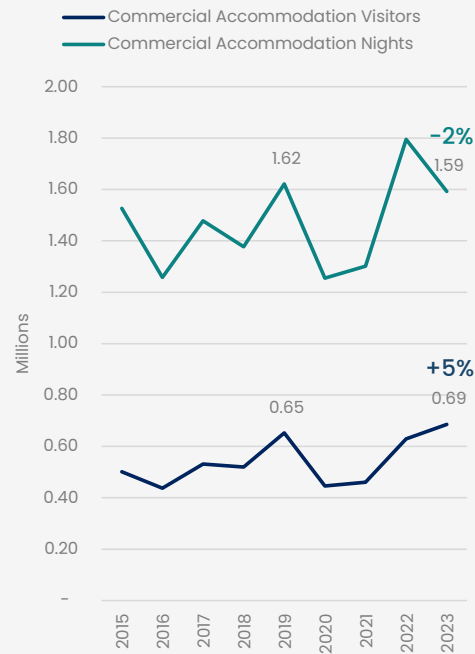
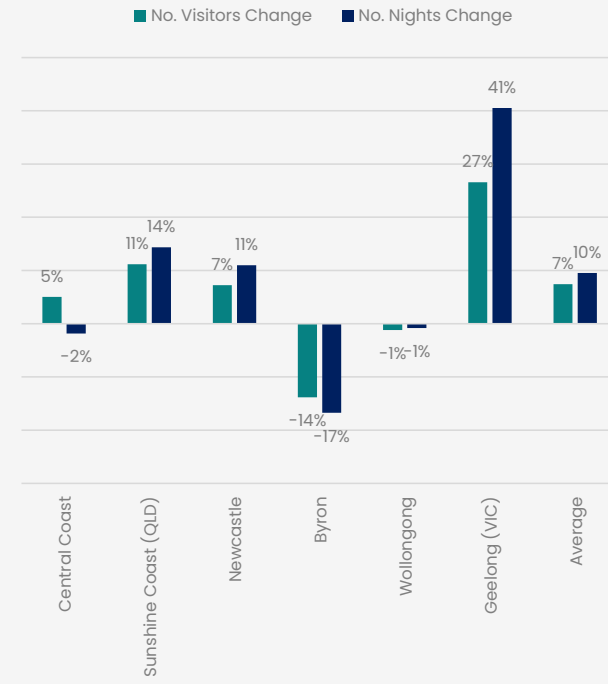


Figure 8:
Change in Paid Overnight Visitors & Nights from 2019 to 2023



CENTRAL COAST VISITOR ECONOMY AND MARKETS

DOMESTIC OVERNIGHT VISITOR PROFILE

Purpose of Visit

Leisure travel and the visiting friends and relatives' markets drive the bulk of overnight visitation to Central Coast – accounting for almost 90% of trips.

Business visitation has declined by 41% since 2019. The Central Coast has continuously attracted a low proportion of business travellers when benchmarked against comparable LGAs.

However, other niche markets have experienced strong growth. Visitors coming for medical reasons has increased by 40% since 2019. Events visitation has also strongly rebounded, showing there is still strong demand for commercial accommodation.

Seasonality

Typical of a coastal destination, peak visitation is during the summer holiday period in January (12%) and December (11%). This is likely due to the Central Coast's year-round mild climate. Visitation levels have also become much less variable post pandemic.

Figure 9 :
Purpose of Visit 2023

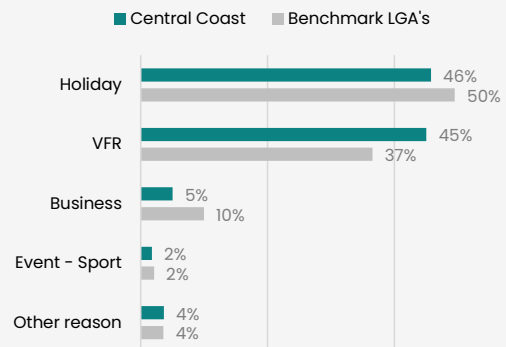
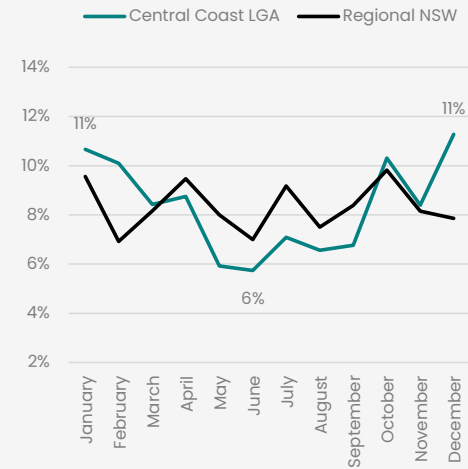


Figure 10:
Paid Overnight Visitation by Month and Day of Week



Source: Tourism Research Australia (TRA), National Visitor Survey, 2023 YE Dec. Presented by Urban Enterprise.

CENTRAL COAST VISITOR ECONOMY AND MARKETS

DOMESTIC OVERNIGHT VISITOR PROFILE

Visitor Origin

The Central Coast primarily attracts a domestic visitor market – with 87% intrastate visitation.

The top sources of interstate visitation include Victoria and ACT.

Travel Party Type and Age Profile

The Central Coast attracts a diverse demographic of overnight visitors as indicated by the mix of travel party types and reasons for travel.

The age profile of visitors skews older, with 48% of overnight visitors aged over 50 years.

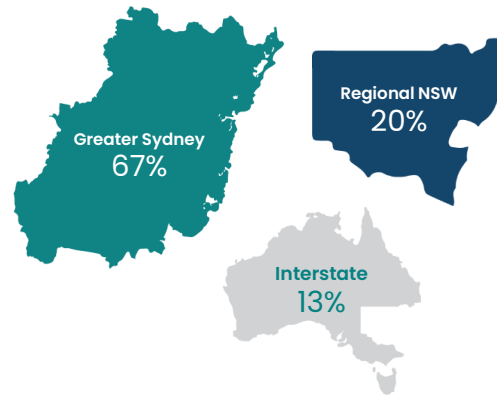
This may present opportunities to strengthen the midweek visitor market.

Visitor Activities

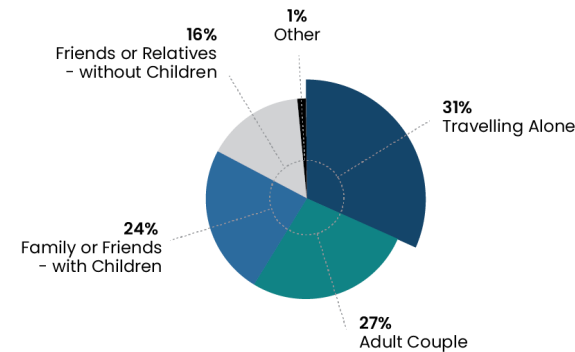
Analysis of visitor activities shows a substantial increase in overnight visitors undertaking shopping, fishing and hiking activities.

Figure 11 : Central Coast Domestic Overnight Visitor Profile 2023 Snapshot

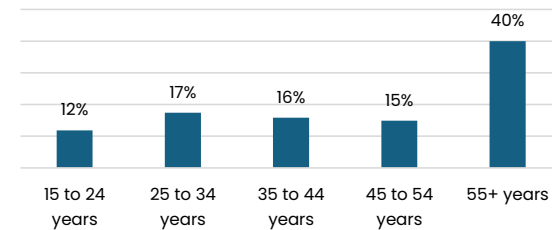
Visitor Origin



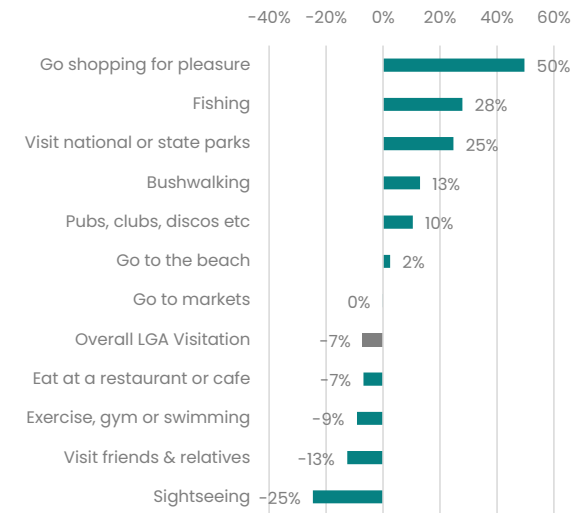
Travel Party Type



Age Profile



Change in Popular Visitor Activities



Source: Tourism Research Australia (TRA), National Visitor Survey, 2023 YE Dec. Presented by Urban Enterprise.

CENTRAL COAST VISITOR ECONOMY AND MARKETS

DOMESTIC OVERNIGHT VISITOR PROFILE

Accommodation Stayed In

In 2023, only 38% of overnight visitors to Central Coast stayed in paid accommodation. The most common accommodation type stayed in was friends or relatives' properties.

The most popular types of commercial visitor accommodation included holiday houses or units and standard hotels or motels (below 4 star).

Compared to the benchmark LGAs, there is a notably lower proportion of visitors staying in luxury hotel and resort, and serviced apartment accommodation in the Central Coast.

Source:

Tourism Research Australia (TRA), National Visitor Survey, 2010 to 2023 YE DEC. Presented by Urban Enterprise.

*Destination NSW – Travel to Central Coast Tourism Region Time Series, YE June 2023

Table 3:
Commercial Overnight Visitors & Nights LGA Benchmarking– Change from 2019 to 2023

	Central Coast LGA	Average of Benchmarked LGA's	Difference
Commercial Accommodation	38%	51%	-14%
Hotel/resort/motel or motor Inn	18%	31%	-14%
Luxury hotel or luxury resort (4 or 5 star)	6%	10%	-4%
Standard hotel/motor inn (below 4 star)	9%	3%	+6%
Serviced apartment	3%	19%	-16%
Rented house/apartment/flat or unit	13%	12%	+1%
Caravan park or camping ground	7%	8%	-1%
Other commercial accommodation	0.5%	1.4%	-0.9%
Private Accommodation	62%	49%	+13%
Own property	6%		
Friends or relatives property	51%		
Other private accommodation	5%		

CENTRAL COAST VISITOR ECONOMY & MARKET PROFILE

KEY POINTS

- Central Coast has a large and growing visitor economy and primarily attracts visitors for its water and nature-based assets and associated recreational activities and attractions. Emerging strengths include food and beverage, arts and culture, events and festivals.
- Overall visitation is concentrated in the well-known centres of Gosford, Terrigal, The Entrance and the south coast of the municipality, which is most proximate to visitor markets in Sydney. The Hinterland region is lesser known as a visitor destination and lacks visitor ready accommodation, product, experience and infrastructure.
- In 2023, approximately 690,000 overnight visitors stayed in paid accommodation across Central Coast. Benchmarking with comparable coastal visitor destinations indicates there is scope to Central Coast to significantly grow its share of overnight visitors.
- The most common accommodation type stayed in was friends of relatives' properties, reflecting the high proportion of visiting friends and relatives travel to the region. only 38% of overnight visitors stayed in paid accommodation, of which the most popular types are holiday houses or units and standard hotels or motels

Section 4. Supply Assessment

ACCOMMODATION SUPPLY

EXISTING SUPPLY

An audit of accommodation product identified a total of 76 commercial accommodation establishments and a total commercial room supply of 2,696 rooms.

Commercial Accommodation Supply

Commercial accommodation is paid accommodation that operates as part of the hospitality industry, provided with management and some level of standardised service provision.

The Central Coast has a low supply of commercial visitor accommodation, representing just 21% of total room supply.

The majority of commercial room stock is supplied by hotels and resorts, followed by motels and serviced apartments.

Hotels, resorts and serviced apartments are generally larger in scale, with a greater contribution to room supply per establishment.

Source:
Central Coast Accommodation Audit,
Urban Enterprise, 2024

Table 4 :
Central Coast Accommodation Supply 2024

	Establishments		Rooms		No. Rooms per Establishment	
	No.	%	No.	%	Avg.	Range
Commercial Accommodation		2%		21%		
Hotels & Resorts	22	28%	1,452	54%	66	
Motels & Motor Inns	25	32%	520	19%	21	
Serviced Apartments	9	12%	412	15%	46	
Caravan, Camping Grounds & Holiday Parks	9	12%	247	9%	27	
Remote Cabins, Cottages & Retreats	7	9%	50	2%	7	
Bed & Breakfasts	3	4%	11	0%	4	
Group Accommodation	1	1%	4	0%	4	
Subtotal	76	100%	2,696	100%		
Private Accommodation		98%		79%		
Rented Holiday House or Unit (i.e. Airbnb)						
House	2,700	77%	8,505	83%	3.2	
Apartment	684	20%	1,505	15%	2.2	
Unique	100	3%	222	2%	2.2	
B&B	10	<1%	12	<1%	1.2	
Subtotal	3,494	100%	10,244	100%	2.9	
Grand Total	3,570	100%	12,940	100%		

ACCOMMODATION SUPPLY

EXISTING SUPPLY

Spatial Distribution of Commercial Accommodation Supply

The Table adjacent provides the sub-regional supply of commercial establishment and rooms

The Entrance and North Lakes subregion currently holds the largest share of visitor accommodation in the LGA at almost 1,000 rooms (37%). Accommodation in this sub-region is dominated by hotels and resorts, however the overall accommodation supply is diverse, with a mix of motels, serviced apartments, and caravan and holiday parks. The Headlands sub-region also contributes significantly to commercial room supply (24%).

Only 2% of total room stock is located in the Hinterland, all of which is motel and motor inn typologies.

Source:
Central Coast Accommodation Audit,
Urban Enterprise, 2024

Table 5 :
Central Coast Accommodation Supply 2024

Sub-Region	Establishments		Total Rooms		Hotels & Resorts	Motels & Motor Inns	Serviced Apartments	Caravan, Camping & Holiday Parks (Cabins)
The Entrance and Northern Lakes	32	42%	985	37%	408	224	203	134
The Headlands (Terrigal and Surrounds)	14	18%	634	24%	385	-	206	39
Gosford and Surrounds	9	12%	367	14%	161	206	-	-
The Peninsula	8	11%	441	16%	341	26	-	74
Wyong and Tuggerah	7	9%	218	8%	157	61	-	-
The Hinterland	6	8%	42	2%	-	6	-	-
Total	76	100%	2,687	100%	1,452	523	409	247

ACCOMMODATION SUPPLY

QUALITY OF ACCOMMODATION OFFERINGS

The majority of commercial accommodation in the Central Coast requires reinvestment to meet visitor expectations.

As best practice, accommodation providers typically renovate or refurbish their room stock every 5 to 7 years. At the time of reporting, only 33% of all commercial room stock in the Central Coast had undergone refurbishment in this period, indicating the majority of accommodation in region is like tired and very outdated.

The majority of establishments are self-rated. Only 17 properties have an accredited star rating by the AAA (Star Ratings Australia). 53% of properties are advertised with a 4 to 5 star rating or luxury status.

This disparity causes establishments to fall short of visitor expectations. This is reflected in the TRA survey data, whereby only 16% of paid accommodation visitors reported staying in luxury accommodation. It can also be observed in poor reviews and user ratings on third party travel sites such as TripAdvisor and Booking.com.

Source:
Central Coast Accommodation Audit,
Urban Enterprise, 2024

Figure 12 :
No. Rooms by Establishment Type and Star Rating 2023

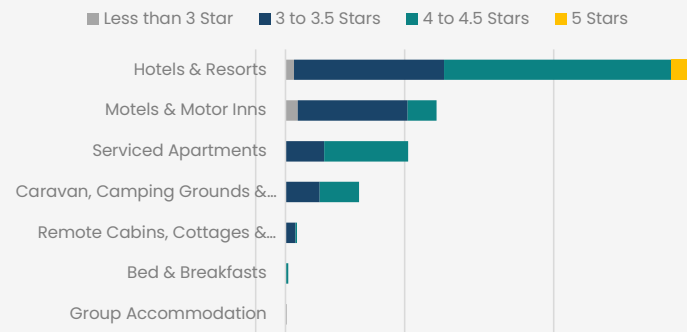
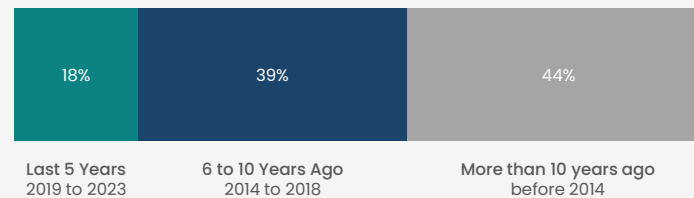


Figure 13 :
Central Coast Accommodation Room Stock - Most Recent Major Renovations or Refurbishment



ACCOMMODATION SUPPLY

EXISTING SUPPLY

Private Paid Accommodation Supply

Private paid accommodation is typically stand-alone accommodation offered by individuals.

In the Central Coast, almost 80% of room stock is supplied by private properties through sites such as Airbnb.

The accommodation audit showed that entire homes account for 77% of listed properties, whilst unique properties only make up 3% of Airbnb properties.

As well as being higher quality, self-contained accommodation is often larger in size compared to other commercial accommodation types and provides visitors with privacy and the ability to self-service during their trip. These characteristics are highly suited to families and large groups, who are often underprovided for by hotels, motels and resorts.

It is likely that these accommodation typologies fill the role of providing higher quality accommodation in locations where the only accommodation option available is midscale accommodation or motels and motor inns.

Gaps in Accommodation Supply

The visitation profile and accommodation audit indicate that Central Coast has a low supply of the following typologies:

- **Accessible rooms** – guest rooms that meet the needs of people with disabilities and older people. These rooms generally feature wider doorways, grab bars and lower fixtures.
- **Luxury and ultra-boutique offerings** – accommodation that attracts high-spend and leading lifestyle markets, that would help elevate the status of the Coast as a destination. There is a missed opportunity to highlight and leverage the Hinterland naturescape through this accommodation typology.
- **Branded hotel and motel chains** – reliable and recognisable accommodation offerings, which can enhance the tourism reputation of a destination and attract wholesale markets.
- **Experiential accommodation** – immersive accommodation embedded in the unique natural environment of the coast. Examples include eco-accommodation, glamping and off-grid accommodation

Source:

Central Coast Accommodation Audit,
Urban Enterprise, 2024

ACCOMMODATION SUPPLY

HISTORICAL GROWTH

The Central Coast has a very low supply of commercial visitor accommodation

When benchmarked against tourism regions with similar sized or smaller overnight markets, including the New England North West, Capital Country and The Murray, Central Coast has a lower inventory of commercial accommodation.

New accommodation supply has not kept pace with overnight visitor growth

Between 2017/18 and 2022/23, the Central Coast experienced a 23% increase in the number of overnight visitors. Over the same period, less than 100 new rooms have been constructed in the region (4.5% growth).

Private visitation accommodation growth has also stagnated. Airbnb listings have remained between the 2,700 over the past 3 years.

Sources:

Central Coast Accommodation Audit, Urban Enterprise, 2024
Tourism Research Australia (TRA), National Visitor Survey, 2023 YE Dec. Presented by Urban Enterprise

Table 6 :
Overnight Visitor & Accommodation Supply Change by NSW Tourism Region - 2017 to 2023

No.	New South Wales Tourism Region	Overnight Visitors	Rooms	Properties
1	Sydney	+737	+4,437	+53
2	North Coast NSW	+463	+945	+28
3	Hunter	+1,085	+761	+17
4	South Coast	+967	+693	+24
5	Central NSW	+369	+638	+19
6	The Murray	+237	+393	+9
7	Capital Country	+276	+310	+11
8	Blue Mountains	+161	+266	+14
9	New England North West	+196	+166	+8
10	Outback NSW	+85	+161	+7
11	Snowy Mountains	+29	+124	+4
12	Central Coast	+336	+94	+2
13	Riverina	+232	+79	+3
-	Total	+4,582	+9,067	199

ACCOMMODATION SUPPLY

ACCOMMODATION MARKET PERFORMANCE

The following provides analysis of accommodation performance data for Central Coast Tourism Region and New South Wales over the previous 6 years, sourced from STR Tourism Accommodation Monitor.

Historically, Central Coast has a strong Average Daily Rate (ADR) and Revenue per Available Room (RevPAR) performance. In 2023, Central Coast averaged 16% above the Regional NSW market which achieved average ADR outcomes of \$217 and performed at similar levels to the Sydney tourism region at \$263.

Occupancy levels have trended lower at 59.6%, which is attributable to several factors, including:

- The impact on higher room rates on perceived value for money.
- Smaller business market, which is typically the core driver of midweek visitation.
- Staffing or other operational issues incentivising accommodation providers to increase room rates rather than increasing occupancy.
- Demand being absorbed by private accommodation (Airbnb), which is excluded from STR datasets.

Source:
Australian Accommodation Monitor – Summary, Years from 2017/18 to 2022/23 YE June, STR
STR defines a property (hotel) on the basis of three exclusionary criteria: • 10 or more rooms • Open to the public • Generates nightly revenue
NSW Tourist Accommodation Snapshot, Destination NSW, December Qtr 2023. STR.

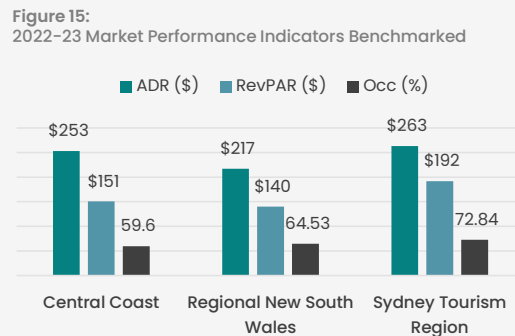
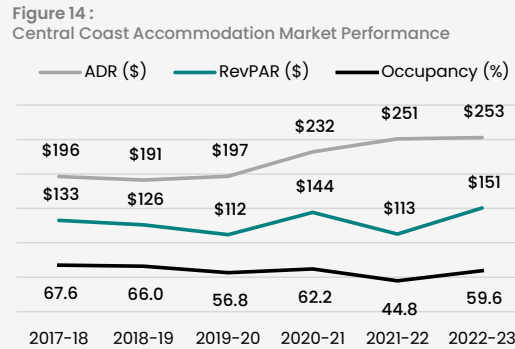


Table 7 :
NSW Tourism Regions ADR and RevPAR – December Quarter 2023

NSW Regional Tourism Region	Occupancy (%)	ADR (\$)	RevPAR (\$)
Central Coast	67.7% (4th)	\$264 (1st)	\$179 (1st)
Hunter	71.2%	\$241	\$172
Riverina	68.5%	\$167	\$114
Central NSW	68.0%	\$207	\$141
South Coast	67.0%	\$242	\$162
The Murray	67.0%	\$170	\$114
North Coast	65.6%	\$263	\$172
New England NW	61.1%	\$173	\$106
Capital Country	59.1%	\$182	\$108
Blue Mountains	54.9%	\$257	\$141
Snowy Mountains	47.8%	\$168	\$80

ACCOMMODATION SUPPLY

ACCOMMODATION MARKET PERFORMANCE

The following provides analysis of Airbnb accommodation performance data for the Central Coast Tourism Region over the previous 2 years,

Compared to benchmark tourism regions, the average room rates for Airbnbs in Central Coast are relatively high, at \$346 per day. This is likely attributable to a very low average annual occupancy rate, due to seasonality and a high number of listings.

Source:

Australian Accommodation Monitor – Summary, Years from 2017/18 to 2022/23
YE June, STR

STR defines a property (hotel) on the basis of three exclusionary criteria: • 10 or more rooms • Open to the public
Generates nightly revenue

NSW Tourist Accommodation Snapshot, Destination NSW, December Qtr 2023.
STR.

Table 8 :
Central Coast Airbnb Market Performance 2023/34 Benchmarked

NSW Regional Tourism Region	Occupancy (%)	ADR (\$)	RevPAR (%)	No. Listings
Central Coast	41%	\$345.8	\$148.0	2,700
Geelong (VIC)	45%	\$229.2	\$105.6	2,300
Wollongong	55%	\$228.6	\$129.2	810
Byron	56%	\$370.4	\$214.9	2,500
Newcastle	57%	\$204.8	\$120.2	770
Sunshine Coast	60%	\$280.0	\$173.7	7,700

ACCOMMODATION SUPPLY

DEVELOPMENT PIPELINE

Development Pipeline

Understanding the current development pipeline is crucial for assessing the future landscape of accommodation in Central Coast NSW.

The development pipeline demonstrates planned investment in a diverse range of accommodation typologies with a high level of accommodation investment planned for Gosford. The majority of future supply will be in the mid to large scale accommodation market.

Realising these opportunities is essential because it ensures that the region can effectively meet evolving demand, support economic vitality, and enhance the quality of life for residents and visitors alike. Successfully bringing these projects online will demonstrate the area's commitment to development and innovation.

Accommodation development planned and underway should be leveraged to help Central Coast attract additional funding and interest from stakeholders, fostering a positive investment climate that drives further growth and solidifies the region's position as a desirable destination.

Table 9 shows the accommodation development pipeline. At the time of the audit there were three new hotels under construction in the region, including:

- VOCO Hotel in Gosford: IHG Hotels & Resorts will soon begin construction on a new premium hotel as part of its \$375 million Archibald apartment development. The 130-room hotel will include a podium outdoor pool with swim-up bar and several food and bar outlets including a restaurant. Construction is scheduled for completion in early 2025.
- Mingara Recreation Club Hotel in Tumbi Umbi: The Mingara Leisure Group has obtained a permit to construct a 19M five-storey hotel that will be integrated with the existing Mingara Recreation Club.
- Saddles Lodge Boutique Hotel: A 17-room, high-end boutique development, an extension to the popular Saddles eatery in Mount White.

Additionally, there are several accommodation developments planned or proposed.

Source:

Central Coast Planning Portal and Development Approvals Team & consultation with accommodation industry

Information accurate as of Aug 2024.

Figure 16:
Planned Five Storey Hotel, Mingara Leisure Group (artist's impression)



Figure 17:
Planned VOCO Hotel, IHG Hotels and Resorts (artist's impression)



ACCOMMODATION SUPPLY

DEVELOPMENT PIPELINE

Gosford Waterfront Plan

The Gosford Waterfront Plan is a comprehensive urban redevelopment strategy aimed at transforming the waterfront area of Gosford, NSW, into a vibrant, mixed-use precinct. The plan focuses on enhancing public spaces, improving connectivity between the waterfront and the city centre, and developing a range of residential, commercial, and recreational facilities. Key elements include creating new parks and promenades, upgrading infrastructure, and fostering economic growth through investments in tourism, hospitality, and community amenities. The plan also includes a proposal for a new hotel, aimed at boosting local tourism and providing high-quality accommodation options to support the area's growth and appeal.

Figure 18:
Gosford Waterfront Plan



ACCOMMODATION SUPPLY

Source:
Central Coast Planning Portal and
Development Approvals Team.
Information accurate as of Apr 2024.

DEVELOPMENT PIPELINE

Table 9:
Active Visitor Accommodation Development Proposals in Central Coast

Name and Type	Suburb and Subregion	Rooms	Other Onsite Facilities & Project Outcomes	Developer & Brand	Status
Under Construction					
VOCO Gosford Hotel	Gosford	+ 130	<ul style="list-style-type: none"> Podium outdoor pool with swim-up bar Restaurant, Food Outlets and Bar 	IHG Hotels & Resorts ALAND	Under Construction. Completed by 2025.
Mingara Hotel Hotel	Tumbi Umbi South Coast	+ 86	<ul style="list-style-type: none"> Will be integrated with existing Mingara Recreation Club which has events and conferencing facilities for up to 400, restaurants, bars, bottle shop, heath and wellness, retailers and an aquatic centre. 5 accessible rooms Up to 10 staff plus 1 manager 	Mingara Leisure Group	Completed
Saddles Lodge Boutique Hotel	Mount White Hinterland	+ 17	<ul style="list-style-type: none"> Day spa Landscaped gardens including live equine sculptures. Located across from the Saddles Restaurant and Nursery 	Singleton Group	Under Construction Completed by 2024
Planning & Design					
Elanora Hotel Motel	East Gosford Gosford	+ 60	<ul style="list-style-type: none"> Additional dining and service areas New children's play area. Adjacent to a refurbished and extended pub and bottle shop 	Bonython Elanora Pty Ltd	Planning Stage Application Lodged Late 2023
The Doylo Resort Hotel & Villas	Doyalson South Coast	+200	<ul style="list-style-type: none"> Stage 1: Hotel with 102 rooms Stage 2: 98 Villa Style Pods 	Doylo Lifestyle Group	Planning Stage
Proposed					
Gosford Waterfront Hotel	Gosford	+80	<ul style="list-style-type: none"> Tavern Retail amenity including supermarket, cinema and restaurants 	TBC	DA Approved
Gosford Waterfront Boutique Hotel	Gosford	TBC	<ul style="list-style-type: none"> Conference Centre 	TBC	Council Endorsed (Gosford Waterfront Masterplan) Hunter and Central Coast Development Corporation preparing Business Case
Lapsed					
216-220 Memorial Ave, Ettalong Beach	Ettalong Beach South Coast	+ 83	<ul style="list-style-type: none"> Restaurant and bar Function facilities Rooftop bar and pool. 	Mars Property Group	Lapsed.
Mercure Kooinah Waters Serviced Apartments	Wyong Northern Lakes	+ 97	<ul style="list-style-type: none"> 24-storey tower comprising 97 serviced apartments and 98 residential units. Restaurant and bar Conference centre 	Mercure	Lapsed? Late 2022
Total		+753			

SUPPLY ASSESSMENT

KEY POINTS

- An audit of Central Coast's accommodation supply identified 76 commercial accommodation establishments and a total supply of 2,696 rooms. This represents 21% of total room supply across all accommodation typologies (commercial and private). The majority of commercial accommodation supply are hotels and resorts, motels and serviced apartments.
- Existing accommodation stock is concentrated in The Entrance and Northern Lakes and Headlands (incl. Terrigal) sub-regions, which both contain a diversity of accommodation typologies. The Hinterland represents only 2% of room supply, which is primarily comprised of motels.
- Overall, commercial accommodation in Central Coast requires reinvestment to meet visitor expectations of quality and there are gaps in the supply of accessible rooms, luxury and boutique offerings, branded hotels and chains and experiential accommodation. These typologies have risen in popularity, with their availability becoming an expectation of visitors.
- At the time of the audit there were three accommodation developments currently under construction in Central Coast, which will enhance the vibrancy and diversity of the accommodation landscape in the region. These developments include:
 - A 130-room hotel in Gosford
 - A 86-room hotel extension to the Mingara Recreation Club in Tumbi Umbi.
 - A 17-room boutique hotel in Mount White.
- Additionally, four accommodation proposals were identified in the planning stage, including those identified as part of the Gosford Waterfront Development Plan and Gosford Bowling Club Development.

Section 5. Understanding Demand for Visitor Accommodation

ACCOMMODATION DEMAND

ACCOMMODATION MARKET PREFERENCES

The following section is informed by a market audience survey undertaken by Urban Enterprise in 2023. The research was undertaken to understand the accommodation preferences of the Australian visitor market and involved a statistically representative random sample of 2,000 Australian residents.

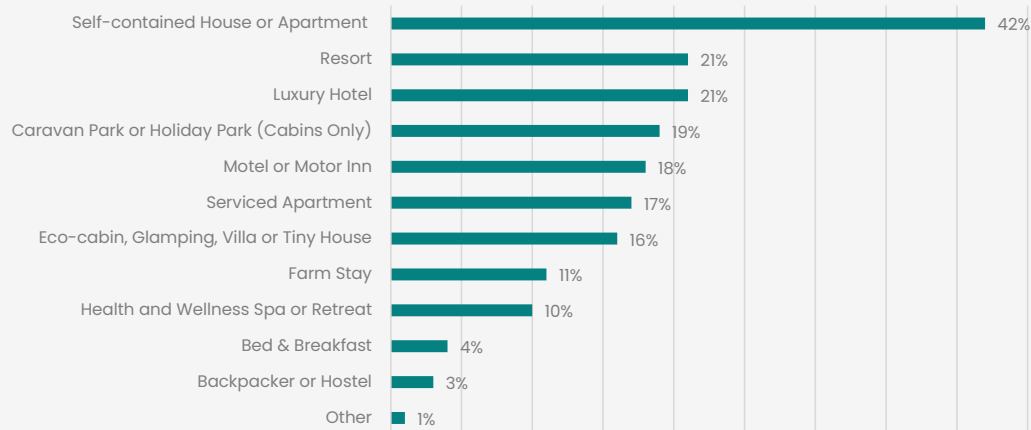
The survey results indicated that the wider Australian visitor market highly values accommodation quality, with over half of all survey respondents indicating their preferred holiday experience involves relaxing in beautiful accommodation.

The most preferred accommodation types reported by survey respondents are self-contained house/unit (42%), resort (21%), luxury hotel (21%) and caravan park/holiday park (19%).

Currently, the Central Coast region's accommodation supply is dominated by caravan and camping, motel and self-contained accommodation types. As a defining factor of the visitor experience, expanding and diversifying the accommodation offer is essential for growing the Central Coast visitor economy.

Source:
Australian Market Research and Audience Survey, Urban Enterprise, 2022.

Figure 19 :
No. Rooms by Establishment Type and Star Rating 2023



ACCOMMODATION DEMAND

TARGET MARKETS

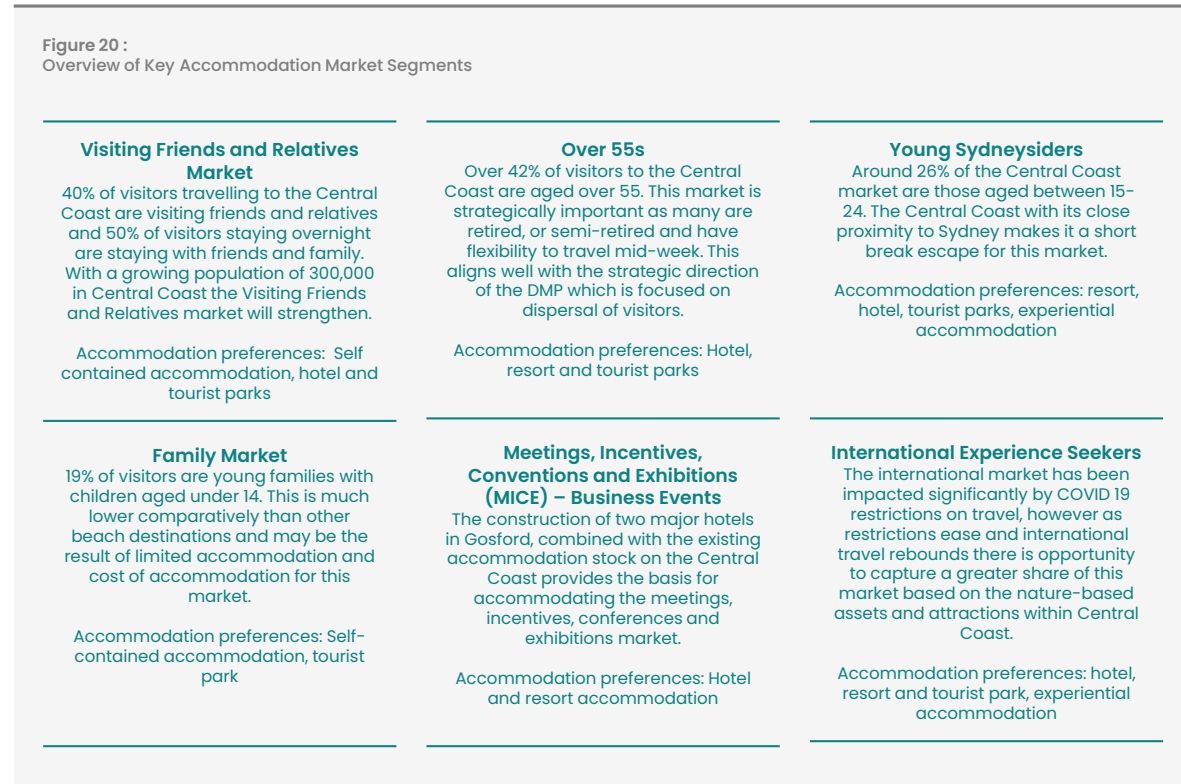
Understanding target market segments is needed for Central Coast to capitalise on comparative advantages and deliver product and experiences aligned to contemporary visitor expectations.

The Central Coast attract a diverse range of visitors, with different needs and preferences.

The target markets identified in the Central Coast Destination Management Plan are shown adjacent. Some of these are existing markets, others were identified in terms of their potential to drive visitation and yield.

Source:
Tourism Research Australia (TRA),
National Visitor Survey, 2023

Figure 20 :
Overview of Key Accommodation Market Segments



ACCOMMODATION DEMAND

TRENDS IMPACTING VISITOR PREFERENCES

Experiential and Unique Accommodation

Travelers are increasingly seeking distinctive, personalised stays that offer unique experiences beyond traditional lodging.

Experiential and unique accommodation includes unconventional properties like tiny houses, yurts, glamping tents, treehouses, and container-style vacation homes.

Data published by AirDNA shows unique or experiential stays are a rapidly growing category.

Experiential or unique properties account for a very small proportion of visitor accommodation supply in Central Coast.

Branded Hotel Accommodation

Established hotel chains pose significant competition in the accommodation sector, creating a substantial barrier to entry for emerging players.

Perceptions of branded accommodation are of consistency in service quality and guest experience, which builds trust and reliability among consumers. Many travellers prefer branded hotels for the assurance of standardized amenities and exceptional service, fostering a sense of familiarity and comfort.

Partnering with a well-established brand can provide new developments with access to an existing loyal customer base, enhancing market entry and customer acquisition. According to recent research by YouGov Surveys, nearly one-third (31%) of Australian consumers are members of at least one hotel loyalty program. This trend underscores the significance of brand affiliation in attracting and retaining guests, as loyalty programs contribute to increased bookings and repeat visits.

COVID-19, Remote Working and Technological Advancements

The rise in remote working in a post-COVID environment provides visitors with more flexibility to travel for more nights and not be constrained by annual leave or public holidays.

The ability of destinations to capture this market will depend on the availability of dedicated workspaces and high-speed internet.

Additionally, advances in technology, such as mobile check-ins, smart room controls, and high-speed internet, are influencing accommodation choices.

Self-contained Accommodation

There is growing demand for self-contained accommodation, driven by travellers seeking privacy, flexibility, and home-like amenities during their stays. Options such as serviced apartments, holiday homes, and fully-equipped cottages appeal particularly to families, groups, and long-stay visitors who appreciate the ability to cook and enjoy more space.

This trend was amplified by the COVID-19 pandemic, with travellers prioritizing safety and minimal contact with others. As a result, properties offering self-contained units are seeing increased bookings.

ACCOMMODATION DEMAND

PROJECTED VISITATION

Demand for overnight visitor accommodation will continue to grow

Visitation projections forecast a **1.65 million increase in overnight visitation** in the 10 years to 2035, with visitation expected to reach approximately **3.35 million overnight visitors** per year at the end of the period.

Data for the 2019 calendar year has been used as the 2023 business as usual scenario due to the lingering impacts of the COVID-19 pandemic. Visitation is expected to resume to 2019 levels in 2025.

The forecast visitation scenarios presented apply the following average annual growth rates:

- Historical visitation to the Central Coast, 2010 to 2019 (6.0%);
- COVID19 Recovery Rate, 2020 to 2023 (5.8%); and
- Tourism Research Australia (TRA) NSW visitation projections, 2023 to 2028 (2.9%).

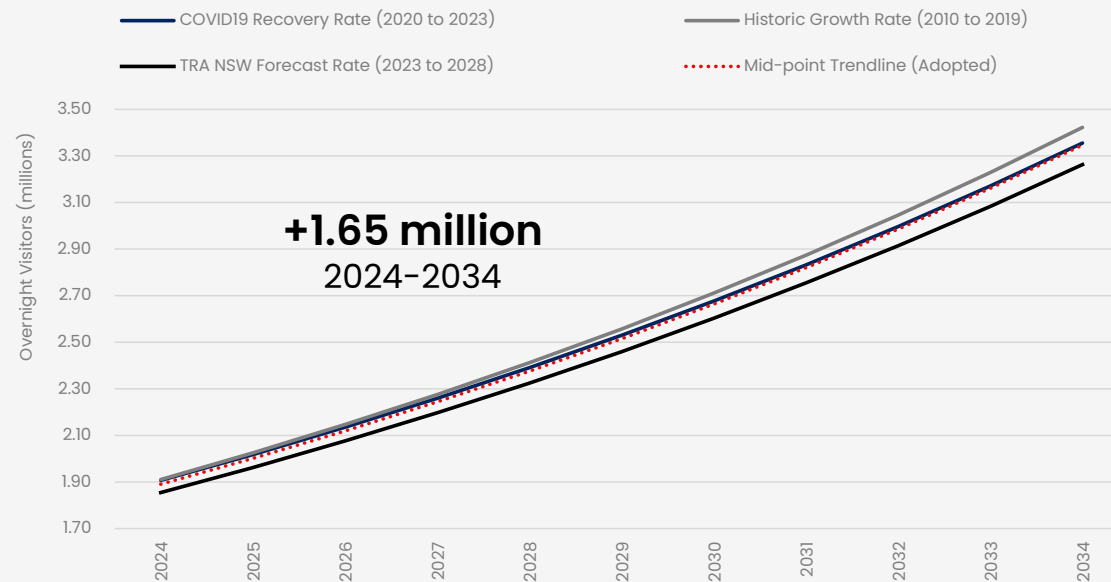
These growth rates provide insight into how visitation growth for the Central Coast might advance in future. The midpoint of these growth rates has been adopted as the projected rate of visitation growth for the Central Coast.

Source:

National Visitor Survey – Stopover Accommodation by Region/SA2, TRA, 2019 to 2023.

*Average of Benchmarked Destinations includes the LGAs of Byron, Newcastle, Sunshine Coast and Wollongong.

Figure 21:
Forecast Overnight Visitation



ACCOMMODATION DEMAND

PROJECTED ROOM NEEDS

Based on the projected growth of visitors staying in paid accommodation in the Central Coast, Table 10 provides a forecast for accommodation needs.

The analysis utilises the following assumptions, based on TRA National Visitor Survey data and primary research. The assumptions have been prepared at a granular level for each subregion to reflect the unique local conditions and demand across the region.

- Average length of stay per visitor for the sub-region
- Average number of visitors per room for the sub-region
- Average room occupancy of 60% across the year region-wide.

Based on the analysis, future additional accommodation needs for the Central Coast by 2035 is between an additional 1,100 and 2,900 rooms.

It is assumed that the midpoint scenario of 2,000 rooms provides the most accurate reflection of accommodation need for Central Coast.

The table on the following page provides an overview of specific accommodation typologies that may be supported in the region between 2025-2035. This is based on a gap analysis of existing accommodation supply in each subregion, and the preferred accommodation types of Australians, as identified in market research.

This should be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region. The number of establishments identified corresponds to the midpoint scenario room/site limit identified above.

Table 10:
Commercial Accommodation Room Demand Growth to 2035

Indicator	Scenario 1: Low Growth	Scenario 2: Mid Growth	Scenario 3: High Growth
Uplift in % of Current Commercial Accommodation Stays	10%	15%	20%
Shortfall in Current Room Supply	180,229	270,343	360,458
Demand from Organic Visitor Growth to 2035	260,708	514,479	768,250
Total Additional Visitors Staying in Paid Commercial Accommodation	440,936	784,822	1,128,708
Additional Visitor Nights	1,379,050	2,454,570	3,530,089
Additional Room Nights	689,525	1,227,285	1,765,045
Rooms per annum	1,889	3,362	4,836
Supportable Rooms (at 60% Occupancy)	1,133	2,017	2,901

Source:
Australian Market Research and Audience Survey, Urban Enterprise, 2022.

ACCOMMODATION DEMAND

Source:
Urban Enterprise, 2024

ACCOMMODATION TARGETS BY TYPE AND SUB-REGION

The table below provides an overview of demand for guest rooms in Central Coast, aligned to sub regions where the accommodation typology is suited. The green ticks identify sub regions aligned to the accommodation offering.

Table 11 :
Modelled Room Demand By Type of Accommodation & Subregion

Accommodation Type	Central Coast LGA Demand			Accommodation Product Fit					
	Total Room Demand	Supply Pipeline	Net Room Demand	Gosford and Surrounds	The Entrance and Northern Lakes	The Peninsula	The Headlands	Wyong and Tuggerah	The Hinterland
Luxury / Upscale Hotel	192	+130	62	✓			✓	✓	
Caravan Park or Holiday Park (Cabins Only)	172		172		✓	✓		✓	✓
Eco cabins/ nature-based resort	143		143		✓	✓			✓
Serviced Apartment	136		136	✓				✓	
Resort	110		110		✓	✓	✓		
Farm Stay	96	-	96						✓
Health and Wellness Spa or Retreat	85	+17	68			✓			✓
Backpacker or Hostel	25	-	25	✓					
Motel or Motor Inn	-105	+146	-251						

KEY ACCOMMODATION INVESTMENT OPPORTUNITIES



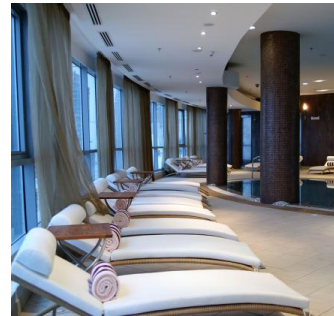
Internationally Branded Luxury / Upscale Hotel

Description

A luxury upscale hotel offers a premium experience characterised by its sophisticated design and high-end amenities. The property typically features elegantly appointed rooms and suites, with ocean views. Key offerings include 24-hour concierge service, personalised spa treatments, and gourmet dining curated by renowned chefs. Additionally, the hotel provides state-of-the-art fitness facilities, a luxurious pool area, and meticulously maintained gardens. Every aspect, from the quality of linens to the selection of artwork, is tailored to deliver an exceptional and seamless guest experience.

Brands

The Langham, Crown Hotels, Park Hyatt, Shangri La, For Seasons, InterContinental, W Hotels, Hilton



Health and Wellness Spa or Retreat

Description

A health and wellness spa retreat accommodation designed to offer a holistic and rejuvenating experience. It features serene and elegantly appointed rooms or suites, set in tranquil, natural surroundings to enhance relaxation. The retreat provides a range of wellness services, including personalized spa treatments, fitness programs, and nutrition consultations. Guests have access to state-of-the-art wellness facilities, such as yoga studios, meditation spaces, and hydrotherapy pools. Emphasis is placed on creating a harmonious environment with high-quality amenities and carefully curated elements to promote overall well-being and a seamless, restorative experience.

Brands

Spices



Eco-tourism Resort

Description

An eco-tourism resort will offer an immersive and serene experience within natural surroundings. Suites typically feature rustic yet elegant rooms, or lodges that blend seamlessly with the environment, providing stunning views of the landscape. The resort emphasises outdoor activities and nature exploration, offering guided hikes, wildlife tours, and eco-friendly adventures. Facilities often include nature-inspired wellness areas, such as outdoor spas, natural swimming ponds, and meditation spaces. Every aspect of the resort is curated to harmonize with the natural setting, focusing on sustainability and providing a tranquil, rejuvenating retreat.

Brands

Spices, Ballie Lodges, Six Senses



Tourist Park

Description

A quality tourist park is designed to offer a diverse and engaging experience for visitors in a well-maintained natural setting. It features a range of accommodation types, such as cabins, tents, or RV sites, often set amid landscaped grounds with easy access to outdoor activities. The park provides various recreational facilities, picnic areas, and playgrounds. Additionally, amenities such as communal gathering spaces, barbecue areas, and convenience stores enhance the visitor experience. The focus is on creating a family-friendly environment that blends comfort with nature, offering opportunities for relaxation and adventure in a welcoming, accessible setting.

Brands

Big 4, NRMA, Discovery Parks



Item No: 1.7
Title: Central Coast Food Manufacturing Innovation Hub
- Occupation and Development of Ourimbah Site
Department: Environment and Planning

3 June 2025 Economic Development Committee

Reference: F2023/01035 - D16838954
Author: Chris Barrett, Commercial Property Manager.
Manager: Bill Ignatiadis, Unit Manager Commercial Property and Business Enterprise
Executive: Shannon Turkington, Director Environment and Planning (Acting)

Recommendation

That the Committee:

- 1 Notes the information provided in this update.**
- 2 Commends Central Coast Industry Connect on progress made on the design, approval, construction, and operation of an industry-leading best-practice food manufacturing innovation hub on the NSW Central Coast.**
- 3 Invites representatives of Central Coast Industry Connect to make a presentation on the scope of the proposed operations of the hub to a future meeting of the Economic Development Committee.**

Report purpose

To inform the members of the Economic Development Committee on progress made on the set-up and operation of a best-practice food manufacturing innovation hub at a Council-owned site at Ourimbah.

Executive Summary

Central Coast Industry Connect (CCIC) is a not-for-profit body for the manufacturing sector on the Central Coast. It has received government commitments of over \$17million to establish the Central Coast Food Manufacturing Innovation Hub. The facility will operate as a co-operative hub for food manufacturing research, innovation, promotion and education.

CCIC approached Central Coast Council for assistance in 2023 to identify a suitable site, preferably close to both the Central Coast campus of the University of Newcastle (a research and training partner of the Hub) and to major food manufacturing businesses, which are concentrated in the Ourimbah-Berkeley Vale area.

1.7 Central Coast Food Manufacturing Innovation Hub - Occupation and Development of Ourimbah Site (cont'd)

Council identified a site at Ourimbah that is suitable for the Hub's development and operations and in accordance with the decision of Council at its June 2023 meeting a preliminary site investigation lease was entered into between CCIC and Council.

Over the past 2 years, site investigations have been completed, development approval has been obtained and a construction certificate for the proposed development has been issued. Negotiation of the terms of a long-term lease for the site are now being finalised.

Background

Central Coast Industry Connect (CCIC) is a not-for-profit manufacturing sector body which maintains, grows and promotes value-adding industries on the Central Coast.

Food manufacturing is a key sector on the Central Coast and is identified as an important sector for future economic growth. CCIC received a federal government commitment of \$17.4 million to establish, develop and promote a state-of-the-art food manufacturing innovation centre (the Innovation Hub) in our area.

The Innovation Hub will be a purpose-built facility that fosters local business and promotes the Central Coast as a nationally significant player in the food processing sector. Its design incorporates a fully functioning and equipped pilot facility and skills development centre that drives industry collaboration and innovation and develops the skills of business owners, managers, employees and contractors.

The Innovation Hub is being developed in three (3) stages:

- The first stage is to establish a skills centre and associated programs.
- The second stage is to construct and fit out a suitable building and install a range of pilot facilities.
- The third stage is to activate the pilot facilities for product development and contract manufacturing and extend its use to the skills centre.

The economic impact of the project is significant with over 200 direct jobs (and potentially 400 indirect jobs) being generated over time as a result of the Hub being in place. The multiplier effect of businesses being nurtured and accelerated through the Hub are not quantified as yet, however, as manufacturing is one of the largest employment sectors on the Central Coast, the economic flow-on benefits will be significant.

During the previous (2022) federal election, it was announced that that if elected a Labor Government would contribute \$17.4 million towards the project to cover construction and fit out of the building and installation of equipment and contribute to initial operational costs.

1.7 Central Coast Food Manufacturing Innovation Hub - Occupation and Development of Ourimbah Site (cont'd)

As well, in-kind contributions were pledged by key industry partners including the University of Newcastle and Regional Development Central Coast and CCIC itself. These contributions are valued at \$1.2 million. The NSW Government also contributed \$380,000 to the project to drive innovation.

Ourimbah was identified as a preferred location for the Innovation Hub because it is close to established food and beverage manufacturers, and it is also close to the Central Coast campus of University of Newcastle (Figure 1).

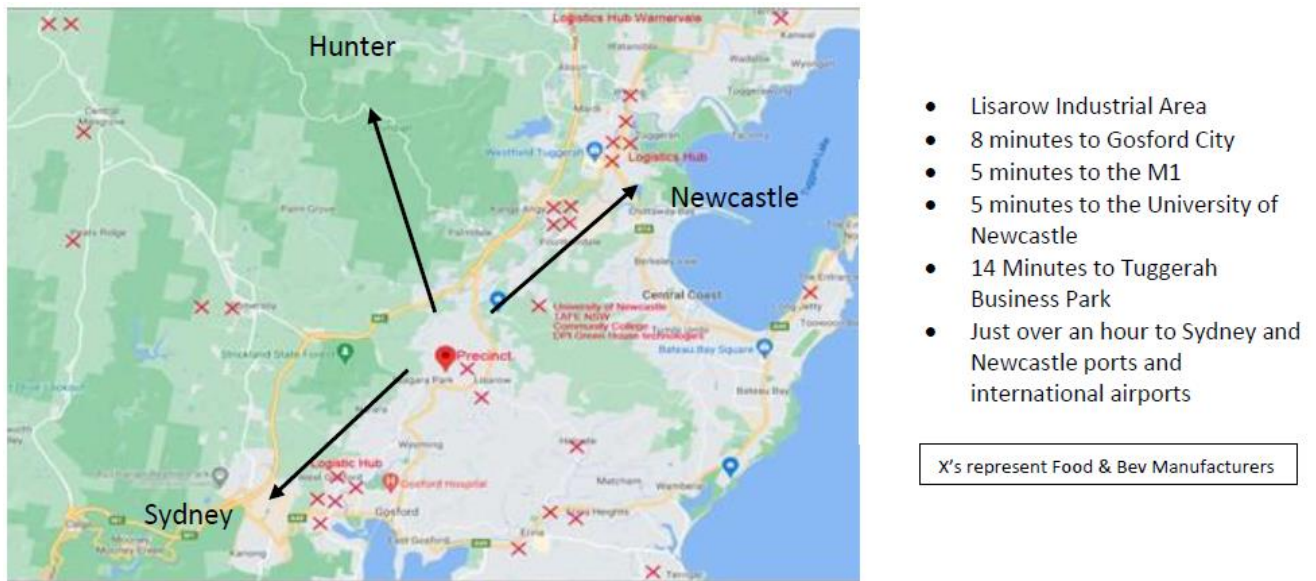


Figure 1 – Overview of the location of the Hub

After an extensive search, a suitable Council-owned site was identified in Ourimbah. The site is at 2 to 4 Brownlee Street, Ourimbah and comprises lot 3 DP 612071 plus part of Lot 42 DP 1237817. It is close to the Pacific Highway, to the M1 Motorway interchange and to Ourimbah Train Station. The site comprises all of Lot 3 and part of Lot 42.

Lot 3 (2 Brownlee Street) is the site of a former sawmill and comprises a mix of E4 industrial land and C2 environmental conservation land. This lot is just over 10,000m² in size, with up to 6,000 m² potentially suitable for general industrial development.

Lot 42 (4 Brownlee Street) is a mix of E4 General Industrial and C2 Environmental Conservation. This site is just under 8000m² in size. There is a Council sub depot on part of the lot which functions as a holding site for road building and maintenance materials.

A creek runs diagonally across this lot and separates the industrial land from the environmental land. Up to 2000 m² is suitable for general industrial development, based on continued occupation of the site by the Council depot. A mains for water supply that traverses both lots is to be re-routed as part of the project.



Figure 2 – proposed Hub site at 2 and 4 Brownlee Street, Ourimbah

At its meeting of 27 June 2023, Council considered a report on the proposed establishment of the innovation hub on the site at 2 to 4 Brownlee Street and resolved as follows:

106/23 Resolved

- 1 That Council authorise the Chief Executive Officer to negotiate, finalise and execute a business development lease with Central Coast Industry Connect for the establishment, development and operation of the Central Coast Food Manufacturing Innovation Hub over operational land at 2 and 4 Brownlee Street, Ourimbah (all of Lot 3 DP 612071 and part of lot 42 DP 1237817).
- 2 That the maximum term of the business development lease be 30 years inclusive of options.
- 3 That the basis for setting site rent take into account innovation and industry development aspects of the Hub and the commitment by Central Coast Industry Connect to employ a food manufacturing innovation and development officer to facilitate research and innovation in food manufacturing on the Central

1.7 Central Coast Food Manufacturing Innovation Hub - Occupation and Development of Ourimbah Site (cont'd)

Coast. Accordingly, that the period allowed to transition to full market rent be 20 years.

- 4 *That, during the course of the business development lease, Central Coast Industry Connect be responsible for site outgoings on a pro-rata basis including but not limited to applicable waste, water and sewerage charges, rates and land tax (if applicable).*

Report

In order for CCIC to undertake the required due diligence investigations, Council and CCIC entered into a short-term site investigation lease. During the short-term lease CCIC also had the opportunity to undertake basic remedial work to the presentation of the site, including de-weeding and waste removal.

In terms of moving development forward over the past 24 months, CCIC has:

- undertaken site testing including to test for any significant site contamination
- undertaken pre-lodgement discussions with Council's development assessment team
- prepared, finalised and submitted a development application (April 2024)
- liaised with Council and the Local Planning Panel during and following the development assessment process
- received development consent subject to a range of conditions including to undertake environmental management works outside the lease area (December 2024)
- been issued with a construction certificate to undertake the works (April 2025).

Now that the construction certificate has been issued, a long-term ground lease over the Hub site is being put in place. The lease runs for a total period of up to 30 years inclusive of two (2) option periods:

- Initial 10-year term comprising construction and initial operation – Nominal base rent; outgoings met by CCIC.
- Intermediate 10-year term - Consolidation - Transition to full market rent over 10 years; outgoings met by CCIC.
- Final 10-year term – Mature operation - Full market rent; outgoings met by CCIC.

1.7 Central Coast Food Manufacturing Innovation Hub - Occupation and Development of Ourimbah Site (cont'd)

As discussed in the report to Council in June 2023, the determination of market rental (which becomes relevant a decade from now) will take account of the willingness of CCIC to act as custodian over the environmental land that forms part of the site and also to undertake community outreach activities.

The in-kind contribution by Council to the project, taking account of rental concessions in the first two lease terms is estimated at over \$1 million in constant 2023 \$ terms.

Partially offsetting the in-kind support from Council is the obligation in the lease for CCIC to fund a dedicated Business Development Manager for the food manufacturing industry.

At the point that the long-term lease becomes effective, the pre-existing short-term site investigations lease will terminate.

Stakeholder Engagement

Extensive consultation occurred between CCIC and Council staff to determine the most suitable site for the project. CCIC consulted with the federal funding body and with the Member for Dobell about the proposed site at Ourimbah and both were supportive. External consultation was also undertaken with the food manufacturing sector and the University of Newcastle. All parties were supportive of the offer of a long-term lease.

Internal consultation was also undertaken with Council's Road Construction and Maintenance Unit, which makes use of part of the site for handling and short-term storage of materials used for road and open space works. It is noted that there is a shortage of other conveniently located sites for such purposes. Accordingly, it is not intended that the offer of the lease in any way impede the continuation of these operations for as long as may be required. Council's Water and Sewer Directorate was also consulted in relation to the water line traversing the site and has confirmed that it is feasible to relocate along the site boundary.

Further consultation also took place under environmental planning and assessment guidelines with nearby landholders and other parties as the development was designed.

Financial Considerations

Financial Year (FY) Implications.

This proposal has cost and revenue financial implications for the current FY and outer years in the LTFP

Budget and Long-Term Financial Plan (LTFP) Impact.

The FY adopted budget includes funding for this proposal.

1.7 Central Coast Food Manufacturing Innovation Hub - Occupation and Development of Ourimbah Site (cont'd)

Link to Community Strategic Plan

Theme 2: Smart

Goal C: A growing and competitive region

S-C1: Target economic development in growth areas and major centres and provide incentives to attract businesses to the Central Coast.

Risk Management

Three risks identified in relation to the offer of the lease to CCIC for the establishment and development of the food manufacturing innovation Hub have all been addressed:

One - A site is not identified on a timely basis at which the Hub will be based.

This risk was addressed via the offer of the Council site at 2 to 4 Brownlee Street, Ourimbah.

Two - The Council site at 2 to 4 Brownlee Street is considered unsuitable.

This risk has been removed. Development approval has been obtained.

Three – The Hub is established but fails to be delivered as agreed or fails commercially.

Suitable safeguards are built into the lease to ensure that the Council or a suitable third party can step in if necessary. Also, both Council and a range of other supporting institutions will have a continuing presence in the management of the site and CCIC generally.

Critical Dates or Timeframes

Finalisation of the terms and execution of the lease is expected to occur prior to the end of July 2025.

Attachments

Nil.

Item No: 1.8
Title: Industry into Schools Pilot Project
Department: Community and Recreation Services



3 June 2025 Economic Development Committee

Reference: F2020/01596 - D16807137
Author: Andrew Powrie, Business Economic Development Manager
Manager: Sue Ledingham, Unit Manager Customer Marketing and Economic Development
Executive: Melanie Smith, Director Community and Recreation Services

Recommendation

That the Committee notes the Industry into Schools Pilot Project report.

Report purpose

To inform the committee on an Industry into Schools Pilot Project (businesses into school lessons) that is occurring in the Central Coast and, advise on foundation secondary schools and businesses partaking in the Pilot Project and the lessons being developed.

Executive Summary

The Industry into Schools Pilot Project (Project) is an economic development strategic initiative from the Central Coast Council's Economic Development Strategy 2040 (the Strategy). The project has been designed to establish a structured, collaborative, and repeatable process for integrating local industry insights into classroom lessons, specifically putting businesses into subject lessons in secondary schools on the Central Coast. The benefit being teachers and students alike having a contemporary understanding of industry in the region, the types of businesses on the Central Coast and what job roles they have along with the skills required to be employed within those industries.

This report will provide information on the Projects development and progress to date.

Background

Central Coast Council's Economic Development Strategy 2040 identified two (2) actions on connecting industry with the schools on the Coast:

1. Start an education and accelerator program for schools on the Central Coast.
2. Prepare a youth engagement action plan for enrolment and education to enhance employment opportunities and participation.

These actions resulted from community feedback in the development of the Strategy that highlighted the need to connect schools with industry in order to:

“Build the future of tomorrow by mobilising the students of today to be ready for tomorrow through working with established industries and capitalising on the emerging high growth industries. It is essential that we provide exciting opportunities and activities locally that attract and retain the younger generation after leaving school.”

The two actions were integrated together into the Project, which has the goal of creating a real-time connection between local businesses and secondary schools (involving students and teachers) in the lesson’s plan.

The Project has been titled “Central Coast Education Networks”, which was chosen to reflect the collaboration between school educators and industry partners, enabled by Council, to benefit students in the region. The project was included in the Operational Plan 2024-25.

This report provides details on the lead secondary schools and businesses participating in the initiative along with lessons developed.

Report

The Project concept was presented to the Regional Economy Taskforce in 2024 to consider how this project would be delivered through a partnership approach.

The Project identified an opportunity to create a lessons-based industry ready education curriculum and, education-ready local businesses that brings all stakeholders together; local industry, the teachers and, importantly, the students and parents.

The opportunity to pilot this Project is a way to test and implement the project model and methodology. This is simplified as businesses into subject lessons and businesses co-designing lessons with the schools, resulting in a connection between local businesses and secondary schools into the lesson plans. The key benefit is that local commerce (industry and businesses) can then be part of class subject lessons at secondary schools on the Central Coast.

1.8 Industry into Schools Pilot Project (cont'd)

The Project methodology was subsequently endorsed by the Regional Economy Taskforce and an independent reference group was established to select a short list of local businesses for the Project. The reference group consisted of stakeholders representing:

- Business NSW.
- Department of Primary Industries and Regional Development.
- Premiers Department.
- Central Coast Industry Connect.
- Department of Education -Training Services.
- Department of Education – STEM.
- Workforce Australia.
- Newcastle University – Ourimbah.

The Foundation Businesses

The goal was to select noticeably different (industry type and products and services) businesses on the Central Coast for the Project. Four (4) businesses were selected by the independent reference group:

1. Talk Agency - full service digital marketing agency.
2. Bioaction - environmental manufacturing and technology company producing modular filtration systems.
3. Rarekind – recruitment and HR agency.
4. 4id Solutions - specialising in asset tracking and tagging technologies.

Council is also participating as a fifth business in the Project with lessons aligned to economic challenges and opportunities shaping the Central Coast's future. This was added after the Project's background was explained during engagement with the participating schools, with a number indicating lessons showing the role Council played in regional economic development and the data and insights used to inform activity was an important one for both the teachers and students.

The Foundation Schools

Secondary schools were selected by direct approach and recommendations from the Department of Education's local leadership group, who also assisted providing some contacts for Public Schools. The key goal was to secure a selection across public, private and independent schools. The foundation schools participating in the pilot are:

Independents

- Saint Philips Christian College.
- Central Coast Grammar School

Public

- Wyong High School – Principal commitment.
- Rumbalara Environmental Education Centre.

Catholic Schools

- Broken Bay Diocese.
- Saint Peters Catholic College.
- Saint Josephs Catholic College.

Noting conversations are in progress with a selection of other secondary schools that may participate and use lessons developed later as their lessons programming schedule allows.

The Lessons

The pilot lessons have been designed under broad themes relevant to the Central Coast to create a sustainable and scalable framework for future learning experiences. These themes offer multiple pathways for exploration, allowing industry partners, teachers, and students to develop and extend lessons further as the program evolves.

Lesson Structures / Pedagogical Approach

The Consultancy delivering the pilot set the lesson structure approach. This setup and activation of the Pilot Learning Experiences, has adopted an Inquiry-Based Learning (IBL) approach. This method encourages student-driven investigation, problem-solving, and critical thinking, ensuring that learning is engaging, relevant, and aligned with real-world applications.

Inquiry-Based Learning (IBL) is an educational approach that emphasises investigation, exploration, and problem-solving. This method allows students to actively engage with real-world challenges, making it easier for industry partners to contribute meaningfully.

The IBL learning sequence follows a structured framework:

1. Context – Introduces the topic, establishing why it matters in a real-world setting.
2. Challenge – Presents a problem or scenario that requires exploration and solution development.
3. Investigation – Students use industry and curriculum-aligned resources to analyse, research, and gather insights.
4. Generalisation – Findings are synthesised and shared through multiple formats (e.g., reports, presentations, or creative outputs).
5. Reflection – Students connect their learning to broader concepts, personal insights, and career pathways.

Why use Inquiry-Based Learning for the Pilot:

- Easier for industry to understand and engage with – The structured investigation-driven model allows industry partners to contribute authentic challenges, feedback, and insights without needing curriculum expertise.
- Accelerates the development of classroom resources – IBL provides a clear framework for lesson design, making it easier to create scalable and adaptable activities.
- Simplifies classroom delivery for teachers – The structured sequence makes lesson planning and facilitation more intuitive, allowing teachers to focus on guiding student exploration rather than direct content delivery.
- Enhances student engagement with locally aligned experiences – Students actively apply their learning to real-world business, economic, and environmental challenges within their local community.
- Strengthens credentialing and digital badging alignment – The IBL approach supports structured assessment and recognition, ensuring clear pathways for students, teachers, and industry partners to engage with a credentialing framework (badges for completing lessons sequences).

By embedding Inquiry-Based Learnings it ensures that lessons are engaging, scalable, and directly relevant to both students and industry needs.

The lessons developments are being co-designed between the business and the school facilitated by the consultant to ensure alignment to the curriculum the schools have in place. The lessons sequence are co-designed to sit within that syllabus, sitting within the curriculum the school is delivering. The businesses are not paid and volunteer their time.

Businesses participating in the pilot program profile their business type, i.e. digital marketing or recruitment/human resource management and support lesson context. Students then choose a type of business to apply their learning to a chosen output e.g. digital marketing plan for a hair salon.

The Lesson Areas for the pilot program are:

Lesson Area 1: Our Coast - Central Coast Council Economic Development

Through the lens of economic development on the Central Coast, students will explore the economic challenges and opportunities shaping the Central Coast's future. They will choose an area of specific interest, analyse key data (Council's publicly available data sets), and develop their own conclusions or project ideas to address challenges or activate opportunities within the local economy.

Curriculum Alignment:

- Business/Commerce.
- Human Society and Its Environment (HSIE).
- English.
- Mathematics.

Lesson Area 2: Digital Presence – Partner – Talk Agency

Digital marketing is a rapidly growing industry, in this lesson students will explore the importance of digital activation, including branding, websites, social media, e-commerce, and online customer engagement. Through real-world case studies and local business insights, students will analyse how businesses on the Central Coast leverage digital tools to reach customers, grow, and remain competitive. Students will assess and critique existing digital strategies, then develop their own digital activation campaign for a local business, personal brand, or startup concept.

Curriculum Alignment:

- Business/Commerce.
- HSIE.
- Technology.
- English.

Lesson Area 3: Sustainability for Business Growth - Partner: Bioaction

Sustainability is no longer just a compliance requirement, it is a key driver of business growth and long-term success. In this lesson sequence, students will explore how businesses can embed sustainable practices to reduce costs, drive innovation, and enhance their market position. By examining real-world business strategies, students will gain insights into how environmental, social, and governance (ESG) principles influence profitability, reputation, and resilience. Students will conduct sustainability assessments of local businesses, identifying strengths, areas for improvement, and opportunities to integrate sustainability into business operations. They will then develop strategic recommendations based on their findings.

Lesson Area 4: Preparing for a Career on the Coast - Partner: Rarekind

Understanding the nature of the Central Coast economy (industry types) and preparing to be part of its businesses community is essential for students aiming to build a career in this local environment. In this lesson sequence, students will delve into the industry landscape of the Central Coast and learn what businesses and local industries will look for in potential employees. This aims to equip students with the knowledge and skills needed in preparing them for successful local careers. Students will develop and present a 'students' sales pitch for a business or industry type on the Coast, outlining the type of business and work opportunities, the skills, and experiences these businesses and industries will look for.

Curriculum Alignment:

- Personal Development, Health and Physical Education.
- Business/Commerce.
- HSIE.

Lesson Area 5: Innovation - Partner: 4id Solutions

Innovation is the key to business survival and long-term success. In this lesson, students will explore how businesses develop new products, services, and processes to stay competitive and adapt to changing markets and emerging technologies. Through real-world case studies, students will examine how businesses on the Central Coast are driving innovation, from startups disrupting industries to established businesses adopting new technologies. They will also analyse barriers to innovation and propose strategies to foster creativity, problem solving, and business growth. Students will be challenged to think and apply innovatively to a real-world problem or opportunity for a Central Coast Business.

Curriculum Alignment:

- Business/Commerce – Entrepreneurship, business growth strategies, competitive advantage.
- HSIE (Economics & Society & Culture) – The role of innovation in economic development.
- STEM – Technology-driven business solutions and product development.
- English – Business storytelling, pitching, and persuasive communication.

Post the Project

At the end of the Project (30 June 2025) an evaluation report will be prepared on the outcomes against the goals, methodology, results, and any lessons learned. The report will consider next steps and future proposals for the project. This report is proposed to be provided to the Committee in August 2025.

Presentation will be provided at the Committee meeting for further discussion.

Stakeholder Engagement

Internal – Youth and Senior Services and People and Culture were engaged to provide advice in the initial stage of the project due to their ongoing engagement with local schools through programs. This provided visibility to those areas of Council in the event the project was raised with the local school contacts.

External - Regional Economy Taskforce.

Financial Considerations

Financial Year (FY) Implications.

The proposal has cost financial implications for the current FY only.

Budget and Long-Term Financial Plan (LTFP) Impact.

The FY adopted budget includes the impact for this proposal.

Operational budget was allocated for this project in 2024-25 FY at \$100,000 for the engagement of the consultant to execute the pilot program.

Link to Community Strategic Plan

Theme 2: Smart

Goal C: A growing and competitive region

S-C3: Facilitate economic development to increase local employment opportunities and provide a range of jobs for all residents.

Risk Management

Nil

Critical Dates or Timeframes

Pilot Project completion and evaluation report – 20 June 2025.

Attachments

Nil.



Item No: 1.9
Title: Night-Time Economy Action Plan 2025-2027
Department: Community and Recreation Services

3 June 2025 Economic Development Committee

Reference: F2025/00095 - D16813831
Author: Sam Hardie, Economic Development Specialist
Manager: Sue Ledingham, Unit Manager Customer Marketing and Economic Development
Executive: Melanie Smith, Director Community and Recreation Services

Recommendation

That the Committee:

- 1 Supports the draft Central Coast Night-Time Economy Action Plan 2025-2027 as set out in Attachment 1 to this report.***
- 2 Recommends to Council that Council adopts the draft Central Coast Night-Time Economy Action Plan 2025-2027.***
- 3 Notes that annual updates of the implementation status of the Action Plan will be reported to the Economic Development Committee.***

Report purpose

This report provides an update on the actions identified in the Central Coast Night-Time Economy Discussion Paper 2024 and the proposed Central Coast Night-Time Economy Action Plan 2025-2027.

Executive Summary

The Central Coast Night-Time Economy Discussion Paper (Discussion Paper) was adopted in April 2024, which recommended 44 actions for Council to consider. Of these actions, several have been completed or commenced, with others planned for later years. This report provides a summary of the status of the identified actions and the planned implementation for the remaining actions, which has been considered in a proposed Central Coast Night-Time Economy Action Plan 2025-2027 (Action Plan).

Background

On Tuesday 23 April 2024, Council resolved the following:

- 106/24 *Notes that public exhibition has occurred for the draft Central Coast Night-Time Economy Discussion Paper.*
- 107/24 *Adopts the attached Central Coast Night-Time Economy Discussion Paper amended as follows:*
- a) *Included Central Coast Local Health District (CCLHD) and Business NSW as example stakeholders for the action – “Establish Night-Time Economy Working Group”.*
 - b) *Added “Use Night-Time Activities Mapping Project in conjunction with the Central Coast Local Health District and the NSW Police to help inform the extended business hours trial action for Special Entertainment Precincts”.*
 - c) *Amended “Undertake a Tourism Branding and Marketing Strategy for Central Coast, with a focus on Gosford as a priority” to “Implement new 3- Year Destination Central Coast Marketing Strategy, with a focus on Gosford and sub regional proposition priorities”.*
 - d) *Added “Direct local businesses to Destination NSW’s NSW First Program in order to establish bookable night-time products and experiences”.*
 - e) *Added “Work with industry and the Office of the 24-hour Commissioner to enroll businesses in the Uptown Accelerator Program and subsequent Uptown Grant Programs”.*
- 108/24 *Supports the identified potential projects within the discussion paper for staff to continue to pursue and implement as existing resources and grant funding opportunities allow.*

Report

The adopted Discussion Paper identified 44 actions for Council to consider, in supporting the night-time economy on the Central Coast. The actions were broken up into short, medium, and long-term across four different themes:

1. Policy and Leadership.
2. Activation.
3. Visual Amenity.
4. Enabling Infrastructure.

Since the adoption of the Discussion Paper progress has been made on a number of actions.

- 5 actions have been completed.
- 6 actions are ongoing programs.
- 4 actions have commenced.
- 12 are scheduled.
- 17 have not commenced.

One of the key projects that covered several actions in the Discussion Paper is the Safer Cities: Her Way program. This program saw the implementation of streetscape upgrades, public art installation, lighting upgrades, and street activations in Gosford CBD to improve pedestrian feelings of safety, with a particular focus on women's safety.

Other ongoing work includes supporting the two Uptown Accelerator Groups, Gosford and Terrigal. This work includes marketing their respective centres and night-time economy business collectives; and extending that support to any other business groups seeking to participate in future rounds of the Uptown District Accelerator Programs being run by the NSW Office of the 24-Hour Economy.

Further detail on the status of the identified actions have been included in the Central Coast Night-Time Economy Action Plan 2025-2027.

Proposed Central Coast Night-Time Economy Action Plan 2025-2027

The Discussion Paper identified short, medium, and long-term actions with suggested priority timelines and responsible business areas that would support its implementation.

The proposed Action Plan sets out the timeline for activities, as well as those already commenced, for the period of 2025-2027. It is proposed this Action Plan will be incorporated in the new Economic Development Strategy which is to be developed in 2025. For future years, a review will be required for deliverables for the medium to long term. Timelines have been aligned with Council's identified regional enabling projects and Council's four-year delivery plan.

Key projects for 2025-2027:

- The implementation of an internal Night-Time Economy working group, and the creation of an external Night-Time Economy Working Group to support partnerships and implementation.
- The investigation and implementation of a new Business Concierge service.
- The development of the Gosford Wayfinding Concept and Design plan.
- The development of a Special Entertainment Precinct for Gosford.

The Night-Time Economy Action Plan 2025-2027 is included as (Attachment 1) to this report.

Gosford Special Entertainment Precinct (SEP)

This project covers a number of actions within the Plan and is anticipated to be a four-year project, covering the project inception, development of the required documentation, trial of the Special Entertainment Precinct and ongoing review of the precinct.

The breakdown of actions identified from the Night-Time Economy Discussion Paper are:

- Establish 'Special Entertainment Precincts' in the LEP in key locations in the Central Coast to manage amplified music.
- Trial an extended business hour policy for Special Entertainment Precincts.
- Trial automatic outdoor dining permit approvals for Special Entertainment Precincts.
- Utilise Section 10.7 planning certificates (formerly s149) to manage community expectations around noise in key night-time economy precincts (Case Study: City of Newcastle).
- Use Night-Time Activities Mapping Project in conjunction with the CCLHD & the Police to help inform the extended business hours trial action for Special Entertainment Precincts.
- In support of the Safer Cities: Her Way pilot program, investigate opportunities for Vacant Property Activation. Proactively engage the Gosford Business Chamber, landowners and creative businesses and encourage them to activate Gosford's empty shopfronts.

The indicative timings for the development of a Gosford SEP, with consideration for the process as outlined NSW SEP Guidelines, are included in Table 1.

Table 1 Gosford Special Entertainment Precinct Indicative Project Timing

Project Phase	Indicative Timing
Early planning and stakeholder engagement	Jun 2025 – Oct 2025
Initial report to Council	Nov 2025
SEP background document development	Dec 2025 – Jan 2027
Council report for endorsement of SEP trial	Feb 2027
NSW Planning review of proposed SEP trial	Mar 2027 – Jun 2027
Undertake trial of SEP	Jun 2027 – Dec 2028
Review of SEP trial	Jun 2028 – Dec 2028
Council decision on SEP continuation	Feb 2029

Stakeholder Engagement

Internal Consultation

Internal staff consultation has occurred with relevant staff from the Strategic Planning, Development Assessment, Destination Marketing and Visitor Services, Events and Placemaking, Community and Culture, Environmental Compliance Services, Roads and Technical Services and Strategic Communications.

External Consultation

Since the adoption of the Night-Time Economy Discussion Paper in 2024, further consultation has occurred with external parties:

- Business NSW Central Coast – expressed their interest in supporting the development of the night-time economy on the Central Coast, particularly noting their support for the development of a Special Entertainment Precinct for Gosford.
- Office of the 24-Hour Economy - in relation to the development of a Special Entertainment Precinct for Gosford and other night-time economy actions that are underway. These discussions will continue, with staff to provide updates to the Office of the 24-Hour Economy regarding the progress of the implementation of the Night-Time Economy Action Plan.

Council staff will undertake further consultation with internal stakeholders, Councillors, the community, other government agencies, and industry stakeholders in the delivery of the Night-Time Economy Action Plan.

It is proposed that the future updates on the delivery of the Night-Time Economy Action Plan 2025-2027 be shared on an annual basis to the Economic Development Committee.

Financial Considerations

Financial Year (FY) Implications.

The proposal has cost financial implications for the current FY and outer years in the LTFP.

Budget and Long-Term Financial Plan (LTFP) Impact.

The FY adopted budget includes funding for this proposal but the LTFP does not include funding for the ongoing impact and will need to be updated in the next review.

The implementation of the Actions identified in the Action Plan will have a financial impact. The actions that are to be commenced or completed in the 2025-26 Financial Year have been budgeted for. The implementation of actions in subsequent financial years will be subject to budget adoption.

Link to Community Strategic Plan

Theme 5: Liveable

Goal B: Creativity, connection and local identity

B-B3: Foster creative and performing arts through theatres, galleries and creative spaces, by intergrating art and performance into public life.

Goal B: Creativity, connection and local identity

B-B4: Activate spaces and places to complement activity around town centres, foreshores, lakes and green spaces for families, community and visitors.

Goal C: A growing and competitive region

S-C2: Revitalise Gosford City Centre, Gosford Waterfront and town centres as key destinations and attractors for business, local residents, visitors and tourists.

Goal C: A growing and competitive region

S-C3: Facilitate economic development to increase local employment opportunities and provide a range of jobs for all residents.

Risk Management

There are a variety of unique risks to night-time economy projects, such as safety, budgetary, resource and reputational risks.

To ensure these risks are addressed appropriately, each project will have a project specific risk assessment and management plan.

Critical Dates or Timeframes

Nil.

Attachments

Night-Time Economy Action Plan 2025-2027 D16768485



Item No: 1.10
Title: Progressing the Warnervale Business Precinct - Standing Item
Department: Environment and Planning

3 June 2025 Economic Development Committee

Reference: F2025/00095 - D16823704
Author: Breelle Varman, Senior Property Development Manager
Manager: Bill Ignatiadis, Unit Manager Commercial Property and Business Enterprise
Executive: Shannon Turkington, Unit Manager Strategic Planning

Recommendation

That the Committee:

1 *Receives and notes the contents of this report.*

Report purpose

This report is provide and update to the Economic Development Committee Meeting on Site 11 – Warnervale Business Precinct. The site is identified as a strategic employment location in the draft Central Coast Employment Lands Strategy but has not seen formal progression through Council processes since 2020. This report outlines the site's historical context, current planning status, and a proposed pathway for renewed master planning.

Executive Summary

The Warnervale Business Precinct (Site 11) has been subject to a range of planning exercises since the 1990s. Although numerous uses have been considered and master planning processes undertaken, formal advancement has been limited due to various changes since 2020. Council's Property Development Team has undertaken several preliminary due diligence tasks to enable a revised master planning process. It is anticipated that a contemporary precinct planning process informed by up-to-date environmental, economic, and infrastructure considerations, will be initiated in the 2025–26 financial year, with an implementation staged approach in the following financial years and in accordance with the Council's exhibited Operational Plan.

Background

The site was initially acquired during the 1970s–1980s as part of the broader Airport Lands acquisition works. At the time, it was purchased as part of a large parcel of land that runway was built over. By 1995, the then Council had progressed a Development Application (DA) for the establishment of a regional airport and concurrently sought to utilise the remaining land for a higher education facility. This vision included integrated residential and commercial uses, along with a botanic garden. Around this period, an external foundation approached Council expressing interest in developing a University Precinct on the site.

Historically, the site was also recognised as the Warnervale Federation Music Park from the 1970s through to the early 2000s. In the early 2000s, there was a growing aspiration for the area to host large-scale events, prompting a request for the provision of essential infrastructure such as water and electricity. In 2000, a formal geographic renaming of the site occurred, changing its designation from 'Warnervale' to 'Warnervale Federation Park.' It appears that the Country Music Association, which had a presence on the site, was disbanded at some point in 2003.

In 2013, further planning work was undertaken as part of Council's Warnervale Precinct 7A Structure Plan. Council resolved to endorse a Planning Proposal to rezone the land from 5(a) *Special Uses Zone* and 7 (a) *Conservation Zone* to an employment use zone formerly known as *Business Park - B7* and *SP2 – Infrastructure* for education purposes, which was supported by an economic study prepared by SGS Consultants. Council also engaged JBA and Cox Richardson to prepare an updated and integrated Education and Business Precinct Master Plan, which was presented to Council in 2014. The following resolutions were adopted:

- 961/14 *That Council place on public exhibition the draft Wyong Education and Business Precinct Masterplan for a period of 28 days once a "gateway determination" has been received.*

- 962/14 *That Council direct the General Manager to submit a further report to Council on the outcomes of the above process.*

- 963/14 *That Council authorise the General Manager to make representations to, and seek interest from, a wide variety of education providers to be part of Councils Education and Business Precinct.*

In line with these resolutions, a site-specific Planning Proposal was submitted to the Department of Planning in 2014, seeking to amend the Warnervale Education and Business Precinct zoning to increase Floor Space Ratio (FSR), building height, and permissible uses to enable greater development intensity. Notably, a 2011 study by the Allen Consulting Group, commissioned by the Central Coast Regional Development Corporation, advised that demand for a viable higher education facility was better suited to a location in the Gosford CBD rather than Warnervale. This position was echoed in the SGS economic report, which noted that a new university campus at Warnervale could fragment the market share of the

1.10 Progressing the Warnervale Business Precinct - Standing Item (cont'd)

University of Newcastle. Consequently, the planning proposal was not pursued, and Council formally discontinued the proposal in 2017 due to strategic inconsistencies.

In 2019, as part of Council's work to establish a conservation agreement over the Porters Creek Wetland (Resolution 1217/19), a subdivision of the Airport and the Warnervale Education and Business Precinct lands was proposed to facilitate the conservation arrangement. At the Council Meeting on 27 April 2020, the following resolution was adopted:

345/20 B *Progress the development of cleared land currently available and zoned Industrial or Business in the Warnervale area as an employment precinct focused around the following sectors: health, manufacturing, food production, renewable energy and/or waste.*

c *Engage the following:*

a *A Project Manager with a proven track record, for an initial period of 18 months, to oversee the development of the employment lands*

In response to the resolution, a report was presented to the Ordinary Council Meeting on 9 June 2020 outlining a series of recommendations to progress the Warnervale Education and Business Precinct Master Plan. It was resolved that the matter be deferred to the newly established Warnervale Working Group for further consideration:

475/20 *That in recognition of the establishment of the Warnervale Working Group as resolved by Council that this matter be deferred to allow consultation with the Working Group prior to a further report being provided to Council.*

A refined report was subsequently prepared outlining the next steps for the Warnervale Precinct Master Plan, including:

- A feasibility study to determine the site's highest and best use.
- Completion of relevant planning studies.
- Stakeholder engagement.
- Subdivision of the site in accordance with statutory requirements.
- EOs and MOUs with education and business to become anchor tenants.
- Engagement of a project manager to oversee the initiative.

1.10 Progressing the Warnervale Business Precinct - Standing Item (cont'd)

This report was presented to the 28 September 2020 Council Meeting, resulting in the following resolutions:

- 999/20 *That Council endorse the proposed concept plan for Warnervale Education and Business Precinct noting that this is not to be interpreted as an endorsement of, or acceptance of any of the content of Planning Proposal PP_2014_Wyong_012_00 and that this Concept Plan will be further developed independently of that proposal.*
- 1000/20 *That Council approve the industry and community exhibition and consultation of the concept plan for 28 days.*
- 1001/20 *That Council approve the call for expressions of interest from business, industry and education providers to partner with the Warnervale Education and Business Precinct.*
- 1002/20 *That a further report to brought back to Council detailing the outcome of the expressions of interest*

Upon the conclusion of the Warnervale Working Group's term, a report was presented to the 13 April 2021 Council Meeting, which included the following directive regarding the Master Plan:

- 2 *Progress the development of Industrial or Business in the Warnervale area as an employment precinct and engage a project manager to oversee the development of employment lands.*

These works have been discontinued as Council's current financial situation has removed the necessary budget for these works. Council is in discussions with various government agencies to consider partnership arrangements to achieve the aspiration for these sites from other funding models.

With the additional action adopted:

- 99/21 *That Council wind up the Warnervale Working Group noting it has now completed its term as resolved by Council.*

Accordingly, the responsibility for progressing the Master Plan has been transferred to the Property Development team, formerly within the Innovation and Futures Unit, now known as Commercial Property and Business Enterprise.

Report

In summary, at the 28 September 2020 Council Meeting a series of resolutions were adopted to progress the Warnervale Business Precinct Master Plan. However, these efforts were subsequently stalled as Council entered a period of financial crisis.

While the concept plan had been introduced it did not progress in design development through the Working Group. Instead, project tasks and actions were slightly refined. At the time, the Working Group's primary focus had shifted to the Porters Creek Wetland Conservation Agreement. Although the appointment of a Project Manager was planned, no finalised scope, deliverables, or budget allocation was secured.

Despite several internal and external studies, the 2020 work continued to emphasise educational outcomes—outcomes that are now better suited to major urban centres such as Gosford. The drivers and nature of employment have shifted significantly since the project's inception and continue to evolve. Planning for a site of this scale must be underpinned by evidence-based analysis and a deep spatial understanding of its constraints and opportunities.

Although Expressions of Interest (EOIs) and Memoranda of Understanding (MOUs) can help gauge market demand, such processes are more appropriately undertaken at later stages, following a comprehensive market sounding or demand study. These foundational studies should inform the concept plan and be responsive to current market conditions. A robust Master Plan which must be informed by rigorous due diligence including assessments of ecology, topography, zoning, land constraints, and economic feasibility.

The concept plan also failed to incorporate strategic community infrastructure identified in Council's contributions plan, including an indoor recreation centre with aquatic facilities, indoor sports courts, and a community library hub. Additionally, a newly constructed water trunk line now traverses the development area, introducing zone-of-influence implications that affect land use and staging—none of which were addressed in prior planning.

Finalising the Master Plan

During the COVID-19 pandemic and the financial crisis period, the Property Development team was redirected to other priority projects, including the Gosford Waterfront Master Plan, Airport Master Plan, asset disposal program, and paid parking business case.

Work completed by the Property Development Team (2021 – 2025)

The following due diligence and planning activities have been completed:

- Land Use Assessment Study (2021): Undertaken by external consultants MacroPlan, this study explored the feasibility of various uses including large format retail, medical and health services, residential, seniors housing, a business park, a supermarket, and general retail.

1.10 Progressing the Warnervale Business Precinct - Standing Item (cont'd)

- Biodiversity and Ecological Studies (2021-2025): Conducted as part of the Airport Master Plan, this included a Biodiversity Conservation Assessment Report (BCAR) covering the Warnervale site to map ecological values.
- Site Survey (2025): A full site survey was completed by a contracted surveying firm.
- Aboriginal Heritage Assessment (2025): Engagement of a heritage consultant to assess the impact of known and potential Aboriginal heritage values (via AHIMS) on site development feasibility.
- Rezoning Initiative (2025): As part of the Airport Master Plan implementation, the land was included in a proposed rezoning to downzone the SP2 (Infrastructure) land due to ecological constraints.

Current Direction and Next steps

The Property Development team, now part of the Commercial Property and Business Enterprise unit and responsible for delivering the Airport Master Plan, is now leading the development of the Warnervale Business Precinct Master Plan as their main priority. Planning will be integrated with broader regional considerations, including:

- The Greater Warnervale Structure Plan
- Warnervale Link Road project timeline
- Community infrastructure needs
- Social and economic demographic trends
- Financial feasibility and staging

The 2021 Employment Zones Reform undertaken by the Department of Planning, Housing and Infrastructure changed the zoning of the site to *SP4 – Enterprise Zone*, a mixed-use zoning designation that supports business, employment, and limited residential uses. The zone objectives are:

- *To support enterprise and productivity.*
- *To provide for a range of office and light industrial uses.*
- *To promote employment opportunities.*
- *To enable land uses that provide services to workers.*
- *To permit limited residential accommodation that supports employment-generating uses.*

1.10 Progressing the Warnervale Business Precinct - Standing Item (cont'd)

Recognising the need for an iterative and evidence-based approach to ensure robustness so that the true value of the site can be ascertained, the team proposes to shift the Master Plan's focus to:

Investigating the potential of the Warnervale Precinct to deliver a vibrant and diverse community by expanding housing and employment capacity, supporting mixed-use development that promotes enterprise, productivity, and liveability.

The aim is to leverage the flexibility of the zone by unlocking the land for development to alleviate housing shortages and create job opportunities. This may include a combination of residential, commercial, and light industrial development, integrated with public spaces and infrastructure to enhance pedestrian activity and support the local economy. With the following studies needed to be completed prior to the issue of a draft Master Plan guiding the best approach to site (not an exhaustive list):

- Finalisation of the Aboriginal Heritage Assessment (18-week statutory process)
- Community needs assessment and demographic analysis
- Case studies of comparable precinct developments
- Refined strategy and vision statement
- Opportunities and Constraints Plan
- Bushfire Impact Assessment
- Transport Intent Plan
- Subdivision Intent Plan
- Infrastructure Servicing Study
- Staging Plan
- Bulk Earthworks Plan
- Internal and external stakeholder consultation

Local Infrastructure Contributions

To ensure adequate provision for the precinct's infrastructure, a review of the Warnervale District Development Contributions Plan 2020 will be undertaken. The Contribution Plan identifies the precinct as the Warnervale Education Site/Porters Enterprise Park and allocates development contributions of approximately \$3.3 million for initial road works and drainage works.

In association with the proposed infrastructure servicing study, new infrastructure requirements and costings will be identified and a revised schedule of works for the precinct will be incorporated into the Warnervale District Development Contributions Plan.

Timeline

As per the current exhibited Operational Plan, the timeline for the Warnervale Master Plan spans across years 2025 to 2029. The current operational objective for 2025–2026 Financial year is the initiation and preparation of the Master Plan, including the commissioning of due diligence studies and engagement of relevant consultants.

The timeframe for the review of the Warnervale District Contribution will span across 2025-26 and 2026-27

Stakeholder Engagement

Nil

Financial Considerations

Financial Year (FY) Implications.

The proposal has cost financial implications for the current FY and outer years in the LTFP.

Budget and Long-Term Financial Plan (LTFP) Impact.

The FY adopted budget includes the impact for this proposal.

The Property Development team has significantly evolved, with strengthened internal capability and the appropriate expertise now in place to undertake the due diligence investigations and prepare a robust Master Plan primarily in-house.

A dedicated budget allocation for this project has now been included in Council's Operational Plan, with Future LTFP to be assessed once the Master Plan is finalised.

Link to Community Strategic Plan

Theme 2: Smart

Goal C: A growing and competitive region

S-C3: Facilitate economic development to increase local employment opportunities and provide a range of jobs for all residents.

Risk Management

The development of a Master Plan carries a range of strategic, financial, and reputational risks. These include misalignment with community expectations, planning objectives, unaddressed site constraints, and potential delays. To manage these risks, a structured project governance framework will be implemented, supported by comprehensive due diligence studies, early stakeholder consultation, and clear scope definition. Ongoing updates presented to the Economic Development Committee will ensure the project remains aligned with strategic priorities and is adaptable to emerging challenges.

Critical Dates or Timeframes

Preparation of the revised Master Plan will commence in the 2025–2026 financial year. Completion is targeted for 2029, in line with the exhibited Operational Plan.

Attachments

Nil.

Item No: 1.11
Title: Central Coast Air Show
Department: Environment and Planning



3 June 2025 Economic Development Committee

Reference: F2024/00983 - D16750851
Author: Chris Barrett, Commercial Property Manager.Commercial Property
Manager: Bill Ignatiadis, Unit Manager Commercial Property and Business Enterprise
Executive: Shannon Turkington, Acting Director Environment and Planning

Recommendation

That the Committee:

- 1** *Notes the extensive insight into staging of future events at Central Coast (Warnervale) Airport gained through the after-event review of the 2024 Central Coast Air Show.*
- 2** *Acknowledge the resources and time needed to secure a suitable air show operator, gain the necessary approvals and undertake all necessary engagement with external stakeholders such as transport and emergency service agencies prior to staging future air shows on the Central Coast.*
- 3** *Endorses in principle the holding of future air shows at Central Coast (Warnervale) Airport.*
- 4** *Recommends to Council that Council endorses the Chief Executive Officer to commence the process to select a suitable air show operator commence as soon as possible, with a view to holding an air show at a suitable time in the 2026-27 financial year.*
- 5** *Resolves, in accordance with provisions of Section 11(3)) of the Local Government Act 1993, that Attachment 1 remain confidential in accordance with Section 10A(2)(d) of the Local Government Act 1993 as it contains commercial information of a confidential nature that would if disclosed prejudice the commercial position of the person who supplied it or confer a commercial advantage on a competitor of Council.*

Report purpose

The purpose of this report is to inform the Economic Development Committee of the requirements for the holding of a major air show (taking into account learnings gained from an after-event review of the 2024 Central Coast Air Show) and to seek confirmation that there is in-principle support for the holding of an air show at Central Coast

(Warnervale) Airport at some time between July 2026 and June 2027, with the actual date to be dependent on commercial and procedural considerations such as securing a suitable operator and obtaining all necessary event approvals.

Executive Summary

The holding of the most recent Central Coast Air Show at Warnervale on the weekend of 25 and 26 May 2024 drew large crowds and was generally regarded as a highlight of the Central Coast event calendar for 2024.

However, staging the event did require a substantial level of Council oversight and approval facilitation and the devotion of substantial third-party resources (for example, to assess traffic management assessments) both in the lead up to the event and on the days of the event.

In particular, intensive and protracted negotiations were required with the air show operator and extensive engagement took place with key state government agencies (especially transport and emergency services).

This report informs the Committee as to the extensive requirements involved in staging a major air show and itemises the resources involved. It also seeks to establish the level of support for the holding of a further air show based on best practice for such events.

Attachment 1 has been deemed to be confidential on the basis that it contains commercial information of a confidential nature that would if disclosed prejudice the commercial position of the person who supplied it or confer a commercial advantage on a competitor of Council.

Background

Several independently organised and operated air shows have been held at Central Coast Airport since Council took back responsibility for management of the airport a decade ago.

The on-day delivery of the 2024 Central Coast Air Show was generally regarded as being a successful event, and the level of attendee satisfaction and the attendee behaviour was clearly very positive.

However, extensive and protracted negotiation was required with the air show operator regarding essential event conduct conditions, and intensive negotiation was required with several state agencies to secure necessary approvals for the event to take place.

The venue for Central Coast Air Show is an attractive venue for the conduct of an air show, being close to major metropolitan centres, being uncontrolled airspace, experiencing generally favourable weather conditions and involving minimal impacts on adjoining landowners.

Nonetheless, there are substantial logistical challenges at this particular venue in conducting an air show or indeed any other high-patronage event on account of lack of on-site parking and lack of regular public transport as well as the absence of direct pedestrian access.

Added to this, there is an inherent level of risk in the conduct of any air show, on account of the dangers involved in close formation aerobatics manoeuvres and in proper containment management of fuel and other display materials, in addition to the management of large crowds in close proximity to on-ground aircraft operations.

From an economic development perspective, the air show provides two classes of benefits.

First, there are direct benefits to the local economy attributable to increase visitation and to spending in the local area. Although significant, these are not as substantial as for some other events.

A large proportion of attendees come from out-of-area on a one-day basis and do not spend elsewhere in the local area during their visit. Also, most service providers and stallholders came from outside the area. Normal flying operations at the airport are suspended during the air show (in effect, a week of trade is lost to the aero club and to council). As well, substantial council and state resources are devoted to obtaining approvals and setting up management protocols and providing a presence in the set-up and take down as well as on event days.

Second, there are indirect benefits from increased awareness of the presence and operations of the airport in the wider community. In essence, the air show promotes public awareness of the significant and growing presence of the Central Coast in the aviation sector as part of the overall Australian economy. While this should not be exaggerated, it is particularly important at a time when other niche aviation sites in the Sydney Basin are being displaced by urban growth and Western Sydney International Airport.

An after-event review was conducted by Council staff following the 2024 Central Coast Air Show that obtained substantial and specific feedback from a range of both internal and external stakeholders. The review was considered by senior Council management and has been taken into account in the preparation of this report.

On account of the candid and potentially sensitive nature of feedback received, the review is circulated on a separate and confidential basis to committee members.

Report

The prospect of development to occur on land which is integral to the conduct of the air show (both for actual air show operations and for spectator access and viewing and for associated stalls) it is unlikely that many future air shows are practicable. However, as noted previously, the Airport is a particular attractive venue for the conduct of an air show provided that sufficient time can be allowed to enter into a suitable agreement, obtain all necessary approvals and address key logistical issue, in particular arrangements for transport of air show patrons to and from the venue. Also, some operator interest has already been indicated to conduct further Air Shows at Central Coast Airport.

In anticipation of support in principle to hold future events, the body of this report covers two main items:

- It provides a brief summary of air shows and air show operators in Australia.
- It provides an outline of planning needed to secure a further air show.

Overview of air shows and air show operators

In terms of air shows conducted in Australia, the two most notable events are Avalon (March) and Gold Coast (August).

There is no single source of reference as to future events, however, multiple trawls of internet event calendars have identified the following events on the annual air show calendar that may be relevant to the Central Coast event. Timing is approximate based on recent history.

JANUARY TO MARCH

Hunter Valley Air Show (Cessnock)
Illawarra Air Show (Shellharbour - Wings Downunder)
Tyabb Air Show (Victoria)

APRIL TO JUNE

Aldinga Air Show (South Australia)
Barossa Air Show (South Australia)
Central Coast Air Show (Warnervale)
Corowa Fly-In

JULY TO SEPTEMBER

Gold Coast Air Show
Mildura Air Show

OCTOBER TO DECEMBER

Warbirds Downunder (Temora)
Barrington Coast Air Show (Taree)
Newcastle Air Show

Only a small number of events are multi-day and the majority of identified events are run on an essentially voluntary basis by enthusiasts typically with a level of sponsorship by local or regional host council.

Some of these essentially voluntary events are run on an ad hoc basis only and not repeated, however, others have a track record with an ongoing local or regional following. Of the enduring events, some are run at certified aerodromes (e.g. Gold Coast, Avalon, Illawarra) and other events are run at a diverse range of aircraft landing areas, typically airfields that are operated by local aero clubs.

There is a very small number of independent air show operators in Australia (independent means independent of the venue at which the event is operated).

Equally, very few commercial airports are willing to manage air shows in their own right, owing to the inherent commercial, logistical and insurance implications as well as the commercial losses due to interruptions to trading .

The main air show operator is the operator of the Australian International Air Show at Avalon airport, which is the Australian-based AMDA Foundation Limited.

Other air shows operated by AMDA include Temora (Warbirds Downunder) in NSW and Air Shows Downunder (formerly Wings over Illawara).

AMDA Foundation Limited delivers some of Australia's largest and most prominent defence and aerospace industry expositions, programs and air shows. AMDA is a not-for-profit foundation, registered under the Australian Charities and Not-for-profits Commission Act, with no shareholders, no investors and no intent to pursue profit for its own sake. The Foundation's mission is to promote the development of Australian industrial and technological resources, in the national interest.

A key stakeholder in many air shows is the Royal Australian Air Force (RAAF): The RAAF is a major stakeholder in the Avalon Air Show, and they participate in the flying program with various aircraft displays and demonstrations.

Other well-established third-party operators include Paul Bennet Airshows (the operator of previous air shows at Warnervale) which is also a prominent contributor to air show flying displays, including at the Avalon Air Show.

The Gold Coast Air Show is operated by a U.S. based operator, Pacific Airshow, which began operations at Huntington Beach in California which has become the most attended air show in the United States. Pacific Airshow Gold Coast is a three-day weekend event featuring heart-pumping aerobatic demonstrations by the world's finest aviators, VIP meet and greet events, social parties, family fun, licensed ticket precinct and more! Featuring some of the

best civilian performers and military aviators from around the globe, Pacific Airshow claims to be the largest airshow to ever take place in Australia with more than 250,000 attendees.

Securing an event operator and obtaining event approvals

A starting point for the conduct of a successful air show is the event operator licence.

The event operator licence grants control of the airport site to the air show operator for the duration of the air show. As part of the operator licence, the air show operator is appointed as principal contractor for WHS purposes. This is a critical factor in managing Council's underlying risk exposure.

A period of 4 months is considered reasonable for the conduct of negotiations to select an event operator and to enter a finalised licence with the selected operator.

Once the licence is in place, an event-specific development application can be submitted, approval for which can be granted with appropriate conditions by Council as consent authority on a one-off basis.

Obtaining the concurrence of key state agencies such as TfNSW is an essential requirement and as noted in the after-event review is likely to be subject to close scrutiny.

Based on recent experience, a period of at least 9 months from the grant of the event operator licence to the provision of development consent is involved, taking account of the various required state government agency concurrences.

Substantial operator effort is also required, particularly to procure remote locations for park & ride sites (where patrons leave their vehicles and transfer to buses).

A further buffer period of 3 months to gain other consent-driven approvals must be allowed.

In all, a period of at least 16 months is required to secure an operator, gain approvals and set up the event.

Based on support for an air show being confirmed by Council at its meeting in late May 2025, the earliest suitable date for the conduct of a future air show would appear to be the month of October 2026.

This would not appear to be in conflict with the dates of other national air shows such as Avalon and Gold Coast or regional shows at Cessnock (Hunter Valley) and Newcastle.

1.11 Central Coast Air Show (cont'd)

As there is a very limited number of established independent air show operators in Australia, the conduct of a formal expression of interest process may not be sufficient in itself to achieve the best outcome in terms of a future air show event on the Central Coast.

Accordingly, while also seeking expressions of interest, it is proposed to reach out directly to major air show operators to canvass their interest in operating an event at Warnervale.

Offers will be sought on the basis that:

- The operator is agreeable to enter into a licence agreement on terms comparable to the 2024 Air Show Operator Licence
- The proposed event date is agreeable to both the operator and to Council
- The operator is responsible for obtaining all necessary development consents and event operational approvals (e.g. food stall approvals, emergency service participation agreements, NSWTF traffic-generating event approvals)
- All necessary insurances are obtained
- Exemption from payment of airport closure charges is provided
- No contribution towards direct event running costs is made by council
- DA assessment will occur on a no-submission-charge basis
- Concurrence of the Central Coast Aero Club to the proposed operating arrangements is obtained (note – access to and use of the privately-owned CCAC facility is essential for the conduct of the event)

Stakeholder Engagement

Internal and external stakeholder engagement is discussed elsewhere in this report and also in the attached confidential attachment.

Financial Considerations

Financial Year (FY) Implications.

The proposal has cost financial implications for the current FY and outer years in the LTFP.

Budget and Long-Term Financial Plan (LTFP) Impact.

The FY adopted budget includes funding for this proposal.

The direct costs experienced by Council in facilitating third-party operation of previous Air Shows at Central Coast Airport (based on the costs experienced for the 2024 Air Show) are relatively modest, taking into account the scale and complexity of the event.

About 2 per cent (one week out of 52) of direct airport operating revenue is lost on account of the temporary closure of the airport (equivalent to \$2,000 all up).

In addition, assessment of the event proposal and the negotiation of a suitable event operator licence requires a level of professional and management time, indicatively 2 to 2.5 months at senior professional rate spread between several sections & units of Council.

As well, on-site and near-site presence of monitoring and support staff is estimated at not more than three weeks at senior team member level.

Link to Community Strategic Plan

Theme 2: Smart

Goal C: A growing and competitive region

S-C3: Facilitate economic development to increase local employment opportunities and provide a range of jobs for all residents.

Risk Management

From the point of view of Council as venue owner, there is a spread of risks involved in holding an air show.

These are initially managed via the preparation of a suitable event operator licence and the selection and the coming to agreement with a suitably experienced air show operator.

Thereafter, the risks are managed by the event operator obtaining and conforming with the multiple approvals required.

From the point of view of the event operator, there are major commercial and logistical risks, including event commerciality, availability of service providers, weather/climate, and conditions of event approval.

The allocation of risks must be strategically balanced to ensure both the eventual success of the event (measured most directly through patronage) and by ensuring compliance with major event best practice.

Critical Dates or Timeframes

The date on which a determination is made as to whether to seek a suitably experienced operator to conduct a further Air Show is made will determine the earliest available date on which the Air Show can be conducted.

A period of at least 16 months is required to negotiate a suitable operator licence and thereafter start obtaining event approvals and procuring event service providers etc.

Accordingly, if a determination is made to move forward at the Council meeting in late May 2025, the first available date for an event to be held will be early October 2026.

Attachments

1	CONFIDENTIAL AAR Warnervale Airshow 2024 -	Provided Under Separate Cover	D16288544
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