



NEW SOUTH WALES

DESTINATION MANAGEMENT PLAN

2018 - 2022

Full Plan



Love the Lake

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Lake Macquarie City Council acknowledges the traditional custodians of the land, the Awabakal People. We pay respect to knowledge holders and community members of the land and acknowledge and pay respect to Elders past, present and future.

1. Words from our Mayor

Lake Macquarie is spoilt for natural assets. Australia's largest permanent coastal saltwater lake, 32 kilometres of pristine coastline and the vast green expanse of the Watagan Mountains are among the natural features of our City, loved and lauded by locals and visitors alike.

As a tourism destination we are attractive, welcoming, affordable and easily accessible to those living within Australia's largest population catchment. The same qualities that lure people here to live are those that attract visitors: the opportunity to escape the rat race; relax and unwind in glorious outdoor settings; or spend quality time with family and friends in the easy, hospitable environment of our town centres and villages.

These attributes bring more than one million tourists to Lake Macquarie each year. Most of them are domestic tourists, but the City's delights are gaining growing recognition within the international market as well, driven by favourable word-of-mouth reviews and exposure gained from the hosting of large-scale events, such as the International Children's Games.

Tourism is an important part of our economy and will play an increasing role as Lake Macquarie continues to diversify and capitalise on the opportunities presented by our superb natural environment, growing number of cultural, sporting and adventure tourism attractions, and our proximity to the international gateway of Sydney.

This Destination Management Plan will help us identify and grasp those opportunities, to package the unique qualities of Lake Macquarie and market them nationally and internationally.

It will provide a blueprint to grow existing markets and further expand our visitor economy, using innovative marketing methods and harnessing the persuasive power of social media to tell our story to the world.

There are exciting times ahead. As our brand mantra suggests, there are endless reasons for tourists to Love the Lake.

Councillor Kay Fraser, Mayor of Lake Macquarie



2. Executive Summary

This Destination Management Plan (DMP) is designed to build on the existing Lake Macquarie DMP and set out the destination management context and road map for Council over the next five years (2018–2022). It reviews and refreshes the ideas and actions of the original document to facilitate relevant planning opportunities for Council.

The Lake Macquarie DMP provides the framework to better understand the visitor economy, including its primary assets and features; challenges to growth; differentiation features; and future opportunities. In doing so, the DMP sets the pathway to achieve the goals of the NSW Government to double visitor expenditure by 2020.

This DMP outlines how the City of Lake Macquarie could partner with the regional visitor economy sector to drive regional performance.

The aims of the DMP are to:

- Improve the understanding of the Lake Macquarie visitor economy.
- Establish a strategic long-term destination vision and tactical plan to grow tourism.
- Define the differentiated destination experience or proposition to appeal to target markets.
- To identify game-changing product development and infrastructure ideas to meet the long-term vision.
- Identify the key strategic priorities and define in broad terms the role of Local Government.
- Articulate practical recommendations to support partnership opportunities.
- Provide high-level recommendations/actions in regards to the positioning of Lake Macquarie Tourism and opportunities for growth.

1. Destination Analysis

2.1.1. Overview

Lake Macquarie, covering 757 square kilometres, is a pristine coastal destination featuring magnificent natural assets including the Lake, beaches and mountains. Its main natural features include:

- the largest permanent coastal saltwater lake in the Southern Hemisphere, with a circumference of 174 km;
- 32 km of coastline to the east, including four seasonally patrolled beaches; and
- the Watagans National Park to the west.

It is a diverse coastal destination abundant with natural assets that provide a distinct sense of place and uniqueness.

The population of Lake Macquarie is dispersed across 95 communities, including nine town centres. The communities vary in size and scale, ranging from quaint and historic to large and commercial.

2.1.2. Key strengths and opportunities

The key strengths of the Lake Macquarie visitor economy, which provide opportunities for further growth, include the following features, products and natural assets:

- **Proximity** – Lake Macquarie is uniquely located close to several metropolitan centres and tourism hubs across NSW, including Sydney, Newcastle, the Central Coast and the Hunter Valley. All of these destinations are within a two-hour drive of the City.
- **Accessibility** – Lake Macquarie is easily accessible for road travellers via the M1 Pacific Motorway and by train on the Sydney Trains Central Coast & Newcastle line.
- **Affordability** – There are a number of free and low-cost activities in the area, coupled with budget-style accommodation facilities, making Lake Macquarie a relatively affordable holiday compared to nearby visitor destinations.
- **Unique and diverse natural assets** – Lake Macquarie has a diverse range of unique natural assets, including the Lake, coastline and National Parks, all which provide a distinct sense of place.
- **The Lake** – The largest permanent coastal saltwater lake in the Southern Hemisphere is an attraction in its own right.
- **Concentration of holiday parks** – Lake Macquarie has a high concentration of holiday parks, compared to other areas in the Hunter Region, which maintains its status as an affordable visitor destination.
- **Sport and recreation** – Positioned as the ‘sport and leisure’ capital of the wider region, the area hosts numerous sporting events that attract both individual and team participants.

- **Shopping and retail precincts** – Multiple retail and shopping precincts are located throughout the town centres, including Charlestown Square and Stockland Glendale, providing additional recreational and entertainment activities for visitors.
- **Health facilities** – Lake Macquarie includes numerous health centres, including day surgery facilities and provision of specialist advice, which allows it to attract regional visitors for specific health reasons.

2.1.1. Visitor market and key source markets

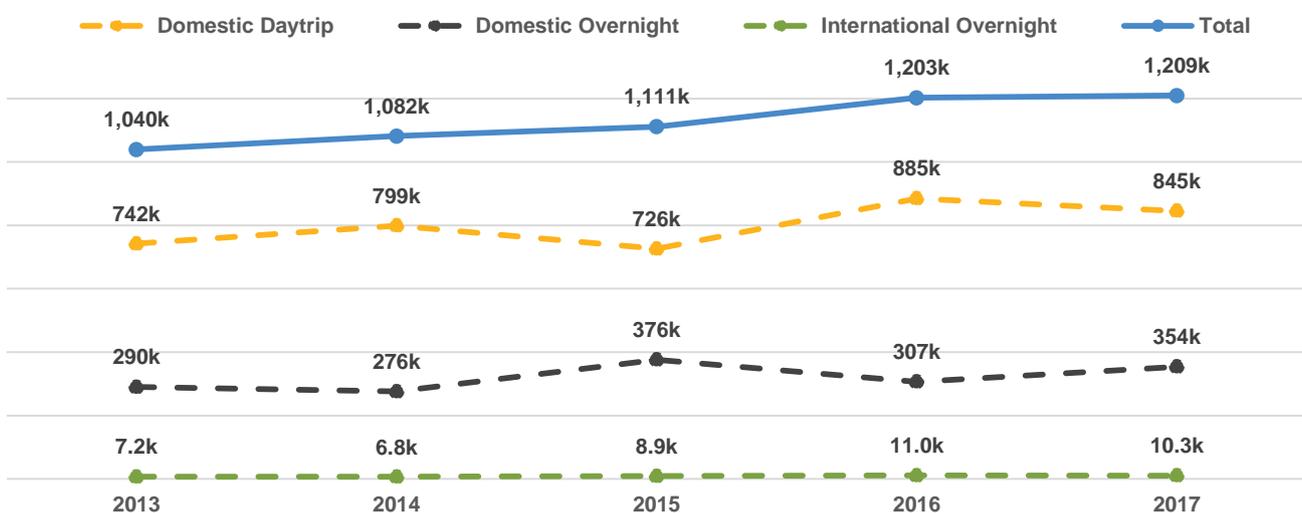
Understanding Lake Macquarie’s visitor economy provides useful context behind visitor trends, motivations, market positioning and target markets. Unless otherwise indicated, visitation data reflects annual figures from the past five years – June 2013 to June 2017 – taken from the *International Visitor Survey* and *National Visitor Survey*, provided by Tourism Research Australia.¹

2.1.1.1. Visitor market

As outlined in Figure 1, Lake Macquarie has received, on average, around 1.1 million visitors per annum (from 2013-2017). In 2017, total visitation was approx. 1.2 million, driven by:

- 70% domestic day trippers;
- 29% domestic overnight visits; and
- 1% international visits².

Figure 1: Visitation to Lake Macquarie (2013-17)³



Lake Macquarie is predominantly a domestic visitor destination and is a particularly popular destination for day trippers, which typically includes visitors from within a two-hour drive of the area. An in-depth examination of the visitor market identified some additional key findings⁴:

¹ Lake Macquarie LGA visitor data was calculated by amalgamating ‘Statistical Area 2’ level data (i.e. areas within the LGA), as defined by the ABS.

² International Visitor Survey and National Visitor Survey, Tourism Research Australia, 2017

³ International Visitor Survey and National Visitor Survey, Tourism Research Australia, 2017

- The visitor market has experienced growth over the past five years, increasing from around 1 million visits in 2013 to 1.2 million visits in 2017 (an increase of 16%). As visitation levels are dominated by the domestic market, Lake Macquarie is currently positioned as a domestic visitor destination.
- Majority of visitation (around 71%) is undertaken by 'low yielding' domestic day trippers, so the opportunity exists to attract more overnight visits, which tend to generate greater levels of visitor spend.
- Visitation is evenly driven by 'holiday' purposes as well as VFR. Although the opportunity exists to convert the VFR market into repeat holiday/leisure visits, which are typically higher yielding and provides greater value to the visitor economy.

2.1.1.2. Source markets

- All domestic day trippers originate from within NSW, with the largest proportion visiting from the Hunter Region (52%), followed by Sydney (31%) and the Central Coast (12%).
- Around 88% of domestic overnight visits also originate from NSW, with the majority visiting from Sydney (56%), followed by the Hunter Region (17%) and Regional NSW (16%), while the remaining 12% originate from interstate.
- Almost 30% of international visitors come from the UK, followed by NZ (19%), mainland Europe (18%) and Asia (16%, including China). However, it is worth reiterating that these visitors only make up a small proportion – 1% – of total visitation to the area.

Clearly, when focusing on the domestic market, the majority of visitors originate from intrastate, particularly from within a 2-hour drive of Lake Macquarie. These visitors are typically drawn to the area by a combination of *proximity* to Lake Macquarie; *affordability*; as well as *unique/diverse* features and natural assets.

⁴ Ibid

2.1.2. Market positioning

Lake Macquarie is in the unique position to be able to market itself to a number of target markets, drawing on its natural assets and features to appeal to visitors. Table 1 summarises the key target markets for Lake Macquarie and the rationale for capturing these segments (note: additional niche segments, representing growth/underrepresented visitor markets, are detailed in Section 3).

Table 1: Lake Macquarie visitor target markets⁵

Visitor market	Why target?
Visiting friends & relatives (VFR) 	<ul style="list-style-type: none"> • Already one of the primary purposes of visits to Lake Macquarie and a key driver of visitation (for both domestic and international markets) • Potential to target both visitors and their hosts (friends or relatives) • Potential to transform into repeat visitation for holiday/leisure purposes
Family market 	<ul style="list-style-type: none"> • Lake Macquarie appeals to the family market as a low-cost holiday destination, that is easily accessible from several metropolitan centres • Attracted to the Lake and coastline, uncrowded beaches and diverse range of activities
Short breaks 	<ul style="list-style-type: none"> • The proximity to Sydney, Central Coast and Newcastle (all easily accessible via the motorway) makes the short break market an ideal target
Nature tourism 	<ul style="list-style-type: none"> • A natural fit with the area, in terms of the unique and diverse natural assets (the Lake, coastline and national parks) • Includes visitors participating adventure-based outdoor activities relating to nature (e.g. 4WD touring, abseiling/rock climbing, bushwalking, extreme water sports, fishing, kayaking, mountain biking, scuba diving, surfing) • Focus on domestic market but potential to leverage off international visitors travelling along the M1 Pacific Motorway from Sydney
Over 55s (incl. grey nomads) 	<ul style="list-style-type: none"> • A growing market that is less constrained by seasonality • Attracted to Lake Macquarie's accessibility and proximity to major metropolitan centres • Attracted to the beach lifestyle, nature-based outdoor activities and low-cost accommodation facilities
Caravan & camping 	<ul style="list-style-type: none"> • Attracted to the high proportion of holiday parks in the area • Appeals to their love of nature and outdoor activities

⁵ These visitor segments align with Destination New South Wales' market segmentation, each of which are based on areas of interest, demographics and purpose of trip.

2.1.3. Opportunities and gaps in supply

A number of opportunities to strengthen Lake Macquarie’s visitor economy have been identified. These opportunities, based on gaps in supply and preferences of the target markets, are summarised in Table 2.

Table 2: Summary of opportunities and products to enable growth in the visitor economy

Category	Opportunity
Nature-based product	<ul style="list-style-type: none"> • Activating the Lake (e.g. ferry services, water sports, dining options) • Activating the patrolled beaches/coastline • Promoting Watagan National Park • Utilising natural ‘hidden treasures’
Cultural and heritage product	<ul style="list-style-type: none"> • Museums/interpretation centres • A major performing arts centre/cultural complex • Free and charged art galleries • Street beautification and public art • Create opportunities for engagement in historical, cultural and heritage awareness, both Aboriginal and European
Major events/festivals	<ul style="list-style-type: none"> • Major flagship event centred around the Lake • Culturally-focused festivals • Nature-based festivals (sailing festival, boating festival) • Sporting events of national, regional and local significance
Supporting facilities	<ul style="list-style-type: none"> • Improving and increasing accommodation facilities • Development of a central tourism hub • Encouraging establishment, conversion development to provide additional accommodation facilities
Governance	<ul style="list-style-type: none"> • Developing a robust governance process for key Council and industry bodies to work together to grow the visitor economy
Marketing and promotion	<ul style="list-style-type: none"> • Promoting key strengths of the City • Improving signage and wayfinding • Developing a stronger sense of identity • Identifying partnership opportunities with surrounding regions (e.g. Newcastle, Hunter Valley) • Decrease market confusion and increase differentiation from other destinations, including Port Macquarie and the Great Lakes

2. Destination Direction

The destination direction sets out the overarching strategic objectives and priorities for the DMP, setting out the pathway that Council needs to follow and providing 'direction' for what it needs to ultimately achieve in order to grow its visitor economy.

2.2.1. Vision

The vision for Lake Macquarie Tourism is to:

Transform Lake Macquarie into a recognised visitor destination both nationally and internationally.

2.2.2. Mission

The mission for Lake Macquarie Tourism is to:

Highlight the differentiating features of Lake Macquarie and provide the necessary product and infrastructure to support the visitor economy.

2.2.3. Key Strategic Priorities

The following strategies are designed to support growth in the Lake Macquarie visitor economy and facilitate the achievement of the DMP's vision and mission.

- 1. Deliver unique visitor experiences to enable growth in tourism.** To achieve this strategy, the focus will be on the key areas that best identify with the Lake Macquarie brand and provide a strong sense of place.
- 2. Develop innovative techniques to increase Lake Macquarie's exposure.** The focus here is to promote Lake Macquarie both domestically and internationally using digital and social media forums and remaining open to new channels.
- 3. Consolidate existing visitor segments and broaden the visitor market base.** This strategy focuses Lake Macquarie's branding and marketing strategies, while also introducing a more comprehensive events calendar focused on developing key sites such as the Lake.

2.2.4. Action Plan

Table 3 details the new actions arising out of the 2018 DMP, aligning with the new strategies outlined above and categorised each project according to marketing & promotion, product-based initiatives and infrastructure-based initiatives

Table 3: New actions to support strategies in 2018 DMP

Number	Action	Strategy	Time-frame	Resourcing	Responsibility	Aim
1. Marketing and Promotion						
1.1	<p>Develop a 5 year Events Strategy that uses the Lake as a focal point to maximise its appeal and provides a distinct sense of place. This could include:</p> <ul style="list-style-type: none"> Major events focused on the Lake (building on existing events and developing new ones) Smaller cultural and heritage-based events/festivals located around the City, but utilising other natural assets such as the coastal areas and Watagans; and Other large events, such as sporting and music events, utilising existing infrastructure (e.g. Speers Point) 	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Sponsorship Council Event support	Council Chambers Hunter Tourism network Community Promoters DNSW	<p>Establish measures and define impact of Events for the city's visitor economy</p> <p>Increase number of events and improve the profile of the City as a destination.</p>
1.2	Council to investigate the feasibility of developing a Tourism Ambassador Program or Tourism Volunteer Program to support the delivery of Tourism Information for residents and visitors	Consolidate existing visitor segments and broaden the visitor market base	2018/2019	Council Operations	Council	Recruit and engage at least 50 Tourism Ambassadors within the first 18 months of the program
1.3	Consolidate and extend the Lake Macquarie visitor destination brand (Love the Lake)	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2021	Grants Council Operations Partnerships	LMT DNSW	<p>Increase visitation by 15% in 2022</p> <p>Destination campaign development targeting key markets.</p>

1.4	Utilise digital media to promote the Lake Macquarie visitor destination brand (Love the Lake)	Develop innovative techniques to increase Lake Macquarie's exposure	2018 - 2021	Council Operations	LMT Council	Quarterly online campaign and website development
1.5	Review and update the visitor website (visitlakemac.com.au)	Develop innovative techniques to increase Lake Macquarie's exposure	2018/2019	Council Operations	LMT Council	Increase traffic to website by 10%
1.6	Explore the feasibility of partnership opportunities with regional tourism teams (Newcastle, Central Coast), including, but not limited to: joint cultural and sporting events; and packaging tourism options	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2021	Grants Council Operations Partnerships	Regional Tourism/ events Council LMT TCC Industry	Develop regional tourism partnerships with events and tourism product packages
1.7	Consolidate a unified governance framework that promotes tourism investment, product development and growth in visitation	Consolidate existing visitor segments and broaden the visitor market base	2018/2019	Council Operations	TCC Industry Council Dantia	Develop a professional tourism and visitor economy focused advisory group by 2020.
1.8	Establish a clear and layered marketing strategy to further consolidate and attract the key markets of Family, VFR, Short Breaks, Nature Tourism, Over 55s and Caravan and Camping	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2020	Council Operations	LMT Council	Increase visitation by 15% by 2022.
1.9	Increase marketing spend to improve reach and profile of Lake Macquarie (potentially funded from other sources)	Consolidate existing visitor segments and broaden the visitor market base	2019 - 2022	Grants Council Operations Partnerships	LMT Council State Gov	Increase visitation by 15% by 2022.
1.10	Continue to improve official visitor publications for an improved visitor experience	Develop innovative techniques to increase Lake Macquarie's exposure	2022	Grants Council Operations Partnerships	LMT Council	Increase visitation by 15% by 2022.
1.11	Position Lake Macquarie as a nationally recognised sporting hub	Consolidate existing visitor segments and broaden the	2022	Grants Council Operations Partnerships	LMT Council Industry Sporting clubs	Improve the number of sporting visitors to the city by 15% at 2020.

		visitor market base				
1.12	Council to continue to improve Visitor Information Services and aim for increasing resourcing linked with major campaigns and partnerships and additionally, investigate 'pop-up' visitor information booths at key locations around the City	Consolidate existing visitor segments and broaden the visitor market base	2022	Grants Council Operations Partnerships	Council	Increase usage of the VIC by 15% in 2020. Initiate at least 3 per year "pop-up" booths
2. Tourism Product-based initiatives						
2.1	Research and develop a long-term Lake Mac Tourism Product Development plan for the city that identifies gaps and opportunities for the expansion of a tourism industry.	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Council Operations Partnerships	Council Industry Dantia	Strategy linked with other key City and regional plans for the promotion of Tourism Product Development
2.2	On-Water Task force and Action Plan for additional specific product development within water-based activities and coastal infrastructure as a priority to enable the re-ignition of a ferry service, tours on the Lake, over-Lake dining options and more water-based activities.	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Council Operations Partnerships	Council State Gov Dantia Industry Private operator	By 2020, there are at least 5 on-lake Tourism activities on Lake Macquarie.
2.3	Work with the Aboriginal community and stakeholders to develop product to increase market awareness of Aboriginal culture	Deliver unique visitor experiences to enable growth in tourism	2018 - 2021	Grants Council Operations Partnerships	Council Aboriginal Community	Enable at least 2 Aboriginal cultural tourism activities by 2020.
2.4	Encourage a major tourism operator to establish in the area	Consolidate existing visitor segments and broaden the visitor market base	2020 - 2022	Grants Council Operations Partnerships	Council Industry TCC Dantia Private operator	Enable at least one major Tourism operator to establish by 2021
2.5	Determine the feasibility of activating commercial tourism options around the Lake, particularly how to overcome rules and regulations governing the Lake	Deliver unique visitor experiences to enable growth in tourism	2022	Grants Council Operations Partnerships	Council State Gov Dantia Industry Private operator	Enable at least one major Tourism operator to establish by 2021
2.6	Improve the flexibility of land use to proactively encourage more tourism development	Deliver unique visitor experiences to enable growth in tourism	2023	Council operations	Council State Gov	Enable at least one major Tourism operator to establish by 2021

Infrastructure-based requirements						
3.1	Investigate the enhancement of existing passive and adventure experiences (walking, kayaking, 4WD, BMX and bridle) by introducing facilities such as pop-up cafes and other supporting commercial facilities.	Consolidate existing visitor segments and broaden the visitor market base	2020 - 2022 and beyond	Grants Council Operations Partnerships	Council Private operator Industry	Promote a package of Adventure Tourism related products by 2020
3.2	Explore feasibility of providing supporting visitor infrastructure/services within Watagan National Park in collaboration with NPSW and within Belmont Wetlands State Park in collaboration with BWSPT	Deliver unique visitor experiences to enable growth in tourism	2020 - 2022	Grants Council Operations Partnerships	Council State Gov Chambers	Promote a package of Adventure Tourism related products by 2020
3.3	Invest in street beautification public art and signage	Deliver unique visitor experiences to enable growth in tourism	2020 - 2022 and beyond	Grants Council Operations Partnerships	Council State Gov Private philanthropy/coll ectors	Commission at least 4 urban and public art commissions per year
3.4	Continue to encourage and enable interest to attract larger, branded accommodation facilities	Consolidate existing visitor segments and broaden the visitor market base	2022 - 2030	Grants Council Operations Partnerships	Council Dantia State Gov Private operator	Enable at least one major Tourism operator to establish by 2021
3.5	Continue to encourage open access for watercraft through the Swansea Channel	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2022	Grants Council Operations Partnerships	Council Dantia State Gov Private operator	Provide a sustained minimum draft of 1.5m
3.6	Continue to improve access to jetties and moorings for local and visitor use and to improve access to the Lake	Deliver unique visitor experiences to enable growth in tourism	2022 - 2030	Grants Council Operations Partnerships	Council State Gov	Implement \$4million in jetty and pier infrastructure from 2018 - 2020 Increase the availability of 60 tonne or more moorings within the lake by 2020.
3.7	Explore feasibility of providing commercial waterfront facilities, such as retail, dining (e.g. fine dining, wine bars) and hire facilities	Deliver unique visitor experiences to enable growth in tourism	2022 - 2030	Grants Council Operations Partnerships	Council State Gov Private operator	At least 4 on-Lake/beach restaurants/cafes by 2021

3.8	Explore feasibility of identifying and creating a dedicated tourism hub that offers accommodation, event venues, visitor attractions and experiences and a town centre	Consolidate existing visitor segments and broaden the visitor market base	2022 - 2030	Grants Council Operations Partnerships	Council Private operator Chambers	Increase visitation by 15% by 2022
3.9	Investigate a quality cultural infrastructure facility that meets community and economic aspirations	Deliver unique visitor experiences to enable growth in tourism	2019/2021	Grants Council Operations Partnerships	Council State Gov	Increase visitation by 15% by 2022
3.10	Develop a feasibility study for a large entertainment conference facility	Deliver unique visitor experiences to enable growth in tourism	2019/2021	Grants Council Operations Partnerships	Council State Gov	Increase visitation by 15% by 2022

The following lists define the priorities and acronyms for responsible stakeholders:

Strategies

Refer to Key Strategies on Page 10.

Timeframe:

Short-term: 2018 - 2019

Medium-term: 2019 - 2021

Long-term: 2021 - 2025 and beyond

Acronyms for responsible stakeholders:

LMT – Lake Macquarie Tourism

Council – Lake Macquarie City Council

TCC – Tourism Consultative Committee

Industry – Includes LMBVE and local tourism operators

Dantia – the economic development company for Lake Macquarie

DNSW – Destination NSW

Private operator – privately owned tourism business

Chambers – Includes Lake Macquarie Business and other Lake Macquarie Chambers of Commerce (e.g. Toronto)

Please note all information in the Action Plan is indicative only and may be subject to further research analysis to determine its feasibility

3. Destination Analysis

1. Key destination footprint

3.1.1. Overview

Lake Macquarie, covering 757 square kilometres, is a pristine coastal destination featuring magnificent natural assets including the Lake, beaches and mountains. Its main natural features include:

- the largest permanent coastal saltwater lake in the southern hemisphere, with a circumference of 174 km;
- 32 km of coastline to the east, including four seasonally patrolled beaches; and
- the Watagans National Park to the west.

Located in the Hunter Region, between Wyong and Newcastle, Lake Macquarie is conveniently situated on the M1 Pacific Motorway, 90 minutes north of Sydney, 10 minutes from Newcastle and 40 minutes from the Hunter Valley and Central Coast. It is two hours by car from Sydney's international airport, 25 minutes from Newcastle Airport, and 10 minutes from the Port of Newcastle.

In terms of transport infrastructure, regular Sydney Trains Intercity rail services are available, linking Lake Macquarie to the Central Coast and Newcastle, while there are also well-established road networks that provide access to the Central West, Northern Tablelands, the Mid-North Coast and the North Coast regions of NSW.

Lake Macquarie currently has a small to medium tourism industry comprised primarily of self-contained properties, holiday parks, motels/hotels and boutique bed and breakfasts. It is a diverse coastal destination abundant with natural assets such as the Lake, beaches and mountains, which provides a distinct sense of place and uniqueness.

3.1.2. Population

The population of Lake Macquarie is dispersed across 95 communities, including nine town centres. The communities vary according to size and scale, ranging from quaint and historic to large and commercial.

There are approximately 203,000 residents living in Lake Macquarie, making it the seventh largest regional city in New South Wales (and the largest within the Hunter Region). Since 2006, the population has grown by around 14,000 (or 8%), comparable to a total of 16% population growth across the whole of NSW for the same period.

However, over the next 20 years to 2036, the population is expected to grow by 24,450 people (or 12%), creating demand for 13,700 new dwellings and 11,741 new jobs. As such, new tourism products and infrastructure requirements that meet the needs of the visitor economy should also take into consideration the needs of local residents as well as the growing population.

2. Key assets

Lake Macquarie is a unique destination within NSW. It is an area of natural beauty and diverse landscapes offering a combination of beach, Lake and mountain environments within easy access of a capital city.

Table 4 outlines the top visitor economy assets for Lake Macquarie, which were identified following a product audit, combined with feedback from stakeholder consultation.

Nine of the 12 key assets are nature-based, while the remaining three are built attractions/experiences. This reflects the core strengths of Lake Macquarie as a visitor destination (see Section 3.4), which offers a variety of unique and diverse natural assets.

Table 4: Lake Macquarie tourism assets

Key asset	Description	Consumer appeal
1. Lake Macquarie 	Lake Macquarie is the largest permanent coastal saltwater lake in the Southern Hemisphere. The Lake supports a wide range of recreational activities that draw visitors to the area, from adventure sports on the water to more passive activities such as walking on the foreshore.	The appeal of Lake Macquarie and the activities it supports is dependent on the consumer. Activities to suit all visitor types are possible, from family-orientated foreshore picnics, to jet boat thrill rides or sailing on the water.
2. Lake Macquarie beaches 	Lake Macquarie's coastline spans over 30 kilometres including patrolled and non-patrolled beaches and rock platform sections. There are four patrolled beaches (Blacksmiths, Caves Beach, Catherine Hill Bay and Redhead) with the lifeguard service running from the September/October school holidays through until April.	Similar to the Lake, the appeal of Lake Macquarie's beaches depends on the consumer. Beach experiences are available to suit all visitor types; families are attracted to the patrolled beaches, while the special interest surfing market can enjoy several high-quality, uncrowded surf breaks
3. Lake Macquarie mountains 	The Watagan Mountains borders Lake Macquarie to the west, comprising of Olney State Forest, Watagan State Forest, Heaton State Forest and Watagan National Park. The State Forests and National Park support a range of recreational experiences including bushwalking, picnicking, camping, scenic lookouts, horse riding and four-wheel driving.	The Watagan Mountains primarily appeal to special interest markets, including nature tourists, bushwalkers and those wanting to participate in four-wheel driving. The Watagans also appeal to the family market as a rustic, natural setting where families can reconnect and bond over 'back-to-nature' style activities.
4. Lake Macquarie trails 	Lake Macquarie has a strong collection of walking and cycling trails located around the City. There are trails to suit every fitness level, many offering water views. The walking trails and shared pathways are promoted through the Lake Macquarie Tourism 'Walking Trails Guide' and the 'Walking and Kayaking Trails Mobile Site'.	Walking and cycling appeals across a wide range of target markets, particularly as there are trails to suit every ability.
5. Speers Point Park Precinct (including Lake Macquarie Variety Playground) 	Speers Point Park is the City's flagship park and has recently undergone significant upgrades, including the construction of the City's first fenced dog park, a new fitness trail and new market promenade. Lake Macquarie Variety Playground is Australia's largest all-abilities playground. The Speers Point Park precinct is also home to the \$13 million Lake Macquarie Regional Football Facility.	Speers Point Park appeals not only to families but to a wide range of target markets, including grey monads and the special-interest markets of event attendees, those interested in fitness and now - with the introduction of the fenced dog park - dog owners. The LMRFF provides a major football event centre for the Hunter and attracts teams (and their families) from around the region and state.

<p>6. Warners Bay Foreshore Shared Pathway</p> 	<p>The Warners Bay Foreshore Shared Pathway covers almost nine kilometres of Lake foreshore and is the area's premier shared pathway, providing stunning lake views for the duration of its length. The recently upgraded path takes in many points of interest including the Lake Macquarie City Art Gallery, Speers Point Park, Warners Bay town centre and Red Bluff Boardwalk.</p>	<p>Given the flat, paved nature of the pathway, coupled with appealing water views, it attracts a wide range of target markets, including families, couples short breaks, grey nomads and special interest walking and cycling tourists.</p>
<p>7. Fernleigh Track</p> 	<p>The Fernleigh Track is a popularly shared pathway built along a former rail line connecting the cities of Lake Macquarie and Newcastle. The track travels through a wide range of natural environments including Belmont Wetlands State Park and is suitable for walking and cycling.</p>	<p>Similar to Warners Bay, the Fernleigh Track appeals across a range of target markets including families, couples short breaks and over 55s.</p> <p>In particular, the Track appeals to the special interest markets of walking, cycling, rail trail tourists and nature tourists.</p>
<p>8. Sea Caves at Caves Beach</p> 	<p>A unique natural attraction, the sea caves are located at the southern end of Caves Beach, a popular, patrolled family beach. The sea caves are best explored at low tide, however, are accessible at other times depending on swell and weather conditions.</p>	<p>The sea caves attract several different target markets as they are a unique feature of the landscape. Families are the primary target market as the caves are a perfect size for children to explore and offer a combined experience with the patrolled beach.</p>
<p>9. Lake Macquarie Cultural Attractions</p> 	<p>The Lake Macquarie City Art Gallery and surrounding cultural precinct is award-winning; housing the gallery, a restaurant and cafe, seminar facilities and an outdoor sculpture park. Tourists form 25 – 28% of total gallery visitor numbers (3% of these are international tourists) and entry is free. SEEN@Swansea is a professional exhibition space for the presentation of our unique history, art, ideas, and touring exhibitions. Dobell House is the former home and studio of Sir William Dobell, now a museum dedicated to his life and work. Catherine Hill Bay is one of only two entirely state heritage listed towns in NSW and has a rich mining history.</p>	<p>Cultural attractions appeal to cultural tourists, short breaks and Over 55s/grey nomads. The art gallery has wide appeal with its waterfront sculpture park and restaurant, while Dobell House frequently attracts tour groups such as Probus.</p> <p>Catherine Hill Bay particularly appeals to the couple's short breaks markets as a unique, uncrowded beach destination, and the special interest surfing market as it is a well-known surfing location.</p>
<p>10. Charlestown Square and Retail Precinct</p> 	<p>With over 270 specialty retailers and attractive department stores such as Myer, Charlestown Square is the largest shopping and lifestyle destination in the Hunter.</p>	<p>Charlestown Square appeals primarily to the family market as there is a selection of recreational activities suitable for children, particularly in wet weather. Visitor numbers from the Lower Hunter are steadily increasing as they seek a 'shopping experience' at the region's largest centre.</p>
<p>11. Lake Macquarie Airport</p> 	<p>Lake Macquarie Airport is home to four aerial tourism businesses:</p> <p>Matt Hall Racing – Joy flights with Australia's only Red Bull Air Race pilot</p> <p>Skydive Newcastle</p> <p>Skyline Aviation – Scenic helicopter flights, tours and private charter flights</p> <p>Airborne Flight Training – Microlight and gyrocopter joy flights and pilot training and hang gliding</p>	<p>The Lake Macquarie Airport appeals to a range of consumer segments, particularly to the 'adventure tourist' market. Matt Hall Racing offers a unique experience as it is the only place in the country you can fly with Matt Hall, Australia's only Red Bull Air Race pilot.</p>
<p>12. Belmont Wetlands State Park(BWSP)</p> 	<p>BWSP is a large area of natural bushland, sand dunes and wetlands, covering 4.5km of unpatrolled coastline between Redhead and Blacksmiths. One of the most popular drawcards of the park is the 4WDrive access to Nine Mile Beach. This requires a permit – available to purchase through local outlets and online on the BWSP website.</p>	<p>Due to the wide range of activities it supports, BWSP appeals across a variety of target markets including nature tourists, short breaks, families and over 55s.</p>

3. Key infrastructure

Infrastructure is essential to developing and expanding the Lake Macquarie visitor economy. Table 5 provides a description of key Lake Macquarie visitor economy infrastructure.

Table 5: Lake Macquarie key visitor economy infrastructure

Infrastructure product	Description	Why is it key?
1. Warners Bay Foreshore Shared Pathway 	<p>The Warners Bay Foreshore Shared Pathway spans almost 9 kilometres of Lake foreshore between Eleebana and Booragul. The highlight of the path is the Red Bluff Boardwalk, a 400-metre elevated section built over the Lake around a small headland at Eleebana. The Pathway underwent recent upgrades at both Warners Bay Foreshore itself, and also where the pathway travels through Speers Point Park.</p>	<p>The Warners Bay Foreshore Shared Pathway is key as it provides a lakeside experience to suit all consumer segments. Due to the flat, paved nature of the path, it is suitable for the young, old and everyone in between. For example, the family market may enjoy a quick stroll at Warners Bay, while cycling the length of the path may appeal to the couples short breaks or special interest cycling markets.</p>
2. Beach Precincts 	<p>The largest and most developed beach precincts can be found at Lake Macquarie's four patrolled beaches (Blacksmiths, Catherine Hill Bay, Caves Beach and Redhead beaches). Each beach features well-maintained access ways, free parking, picnic and BBQ facilities, amenities and a surf club with function rooms and a kiosk. Lake Macquarie's beach precincts are continually being upgraded.</p>	<p>These major beach precincts are rated as key infrastructure as the visitation of patrolled beaches is a major attraction for many consumer segments.</p>
3. Walking and Cycling Trails 	<p>Lake Macquarie's walking and cycling trails are located citywide. Some trails are built, featuring paved or boardwalk sections, while others are less developed, offering a bushwalking-type experience. Some trails are maintained by Lake Macquarie City Council, while smaller numbers are looked after by local Landcare and community groups. Several popular bushwalks are located in National Parks or SCAs and hence maintained by the appropriate organisations.</p>	<p>Previous market research demonstrated that the most popular activity for visitors to Lake Macquarie was walking, with cycling also a top choice. Therefore, it is vital to maintain and further develop walking and cycling facilities in order to improve and exceed visitor expectation.</p>
4. Lake Macquarie Variety Playground and Speers Point Park Precinct. 	<p>Speers Point Park, in which the Lake Macquarie Variety Playground is situated, is the City's flagship park and is currently undergoing significant upgrades, including the construction of the main promenade; new shelters; the City's first fenced dog park and a new fitness trail.</p>	<p>The Lake Macquarie Variety Playground is an award-winning attraction that is unique to Lake Macquarie, being the largest all-abilities playground in the country. The recent upgrades to Speers Park will equip the area to better host a range of large-scale existing community events, including the Living Smart Festival and the Lake Macquarie Farmers Markets, with the potential to attract other valuable events into the future.</p>
5. Lake Macquarie Holiday Parks 	<p>Lake Mac Holiday Parks consists of one beachside and three lakeside holiday parks, located at Belmont, Blacksmiths, Swansea and Wangi Wangi. Each of the Lake Mac Holiday Parks have maintained TripAdvisor star ratings of 4 – 4.5 stars.</p> <p>The parks feature a range of recreational facilities including mini-golf, tennis and basketball courts, resort-style swimming pools, camp kitchens and recreation rooms. These parks have undergone recent capital improvement works with further works planned for each park.</p>	<p>Lake Mac Holiday Parks provide quality camping, caravan and cabin-style accommodation and features three unique lakefront locations and the Blacksmiths park being the closest holiday park in the area to the beach.</p> <p>The holiday parks draw visitors to the area and allow Lake Macquarie to attract and cater for the largest growing tourism sector in NSW.</p> <p>The economic benefit of the four Lake Mac Holiday Parks totals over \$29million annually.</p>
6. Fernleigh Track	<p>The Track travels through a wide range of natural environments, including Belmont Wetlands State Park, and is suitable for walking and cycling. Drinking fountains, seating and signage are located at intervals</p>	<p>The Fernleigh Track is a key community facility for visitors and residents alike. The Fernleigh Track is a suitable activity for many key consumer segments and attracts the special interest cycling and rail trail</p>

	<p>along the track, with free parking located at some of the former railway stations. Continual improvements to the Fernleigh Track are being undertaken and proposed extensions to connect the Fernleigh Track with Belmont Foreshore and Blacksmiths are outlined in the LMCC Cycling Strategy 2021.</p>	<p>markets to the area.</p>
<p>7. Visitor Information Centre</p> 	<p>The Visitor Information Centre for Lake Macquarie is located in Swansea, the southern gateway to the area. The Centre is Level 1 Accredited, therefore, operating seven days per week.</p>	<p>The Lake Macquarie Visitor Information Centre is a key resource for the area, providing comprehensive information and booking service. The Centre is located in a convenient location on the Pacific Highway.</p>
<p>8. Charlestown Square Retail Precinct</p> 	<p>As above – As above, see Table 4.</p>	<p>Charlestown Square is the largest shopping centre in the Hunter region. The range of recreational activities and dining options available position it as the premier lifestyle and retail destination when compared to shopping centres in the area.</p>
<p>9. Catherine Hill Bay</p> 	<p>Catherine Hill Bay is one of only two towns in NSW that is entirely listed on the State Heritage Register. In addition to renovated old miner's cottages that now act as unique accommodation, the area offers a surf club overlooking the beach for functions, and a unique destination pub that dates back to the mining days.</p>	<p>Catherine Hill Bay is unique to Lake Macquarie. This historical seaside mining village has one of only a few remaining wooden ocean jetties on the east coast of Australia.</p>
<p>10. Lake Macquarie City Art Gallery</p> 	<p>The Lake Macquarie City Art Gallery and cultural precinct consist of the gallery itself, seminar facilities, local arts and craft shop, outdoor sculpture park and a fine-dining restaurant. A LED digital lighting system makes the gallery one of the most environmentally sustainable galleries in the country.</p>	<p>The gallery is the only waterfront gallery in the Hunter Region. With the cafe restaurant and scenic outdoor grounds, it is more than just an art gallery and therefore appeals to segments other than just the special interest Cultural Tourists.</p>
<p>11. Lake Foreshore Areas and Facilities</p> 	<p>Much of Lake Macquarie's foreshore is devoted to parkland. In the town centres of Belmont, Toronto and Warners Bay, the foreshores are pleasant, landscaped areas that include picnic and BBQ facilities, playgrounds (Belmont and Toronto), lake swimming areas (Belmont Baths (planned) and Toronto (existing)), paved foreshore pathways and jetties.</p>	<p>These foreshore areas are locations where tourists can enjoy iconic Lake Macquarie scenery and fulfil their expected touristic experience of the Lake, for example, see and photograph jetties, boats on the water, as well as a picnic or go for a walk on the Lake foreshore. Well-maintained 'boating' facilities such as jetties and boat ramps are vital to attracting and retaining special interest markets including 'boaties' and anglers.</p>
<p>12. Lake Macquarie Airport</p> 	<p>Lake Macquarie Airport currently includes a single-storey terminal, runway and several hangars. It is also the Westpac Rescue Helicopter base. Future plans are in place to expand the site by building a new terminal, including a cafe, and additional hangars. The airport is currently used for tourism/private purposes only and does not operate commercial passenger flights.</p>	<p>Lake Macquarie Airport is arguably the hub for aerial tourism across the Hunter and Central Coast regions. It is key as prior to the airport being redeveloped for tourism purposes, these activities were not available in the area, hence it has greatly expanded the potential for adventure tourism in Lake Macquarie.</p>
<p>13. Town Centre Streetscape Upgrades and New Precinct Developments</p> 	<p>Streetscape Master Plans exist for all nine town centres, with works currently being undertaken in Toronto (2017). Recent upgrades took place in Cardiff, with a new masterplan for Glendale being adopted in 2015/2016, providing opportunities for public art and high-quality street furniture.</p>	<p>Keeping Lake Macquarie's town centres up to date, clean and fresh helps to deliver a positive visitor experience and ensures Lake Macquarie meets or exceeds consumer expectations as a progressive, modern City when comparing our destination to others.</p>

4. Key strengths and opportunities

Table 6 summarises the key strengths and opportunities of Lake Macquarie, which helps identify its unique selling point as a visitor destination and what it has to offer to potential (and existing) visitors. The range of strengths and opportunities listed here helps differentiate Lake Macquarie from surrounding regions such as Newcastle and the Central Coast, detailing some of the specific reasons why visitors would choose Lake Macquarie.

Table 6: Lake Macquarie strengths and opportunities

Strength	Description	Opportunity
Proximity	<p>Lake Macquarie is uniquely located close to several metropolitan centres and tourism hubs across NSW, affording it a unique role and position in the context of several regions, including:</p> <ul style="list-style-type: none"> • Sydney – 90 minutes to the south • Newcastle – 15 minutes to the north (e.g. Charlestown to Newcastle CBD) • Central Coast – 40 minutes to the south • Hunter Valley – 40 minutes to the north 	<p>This provides an opportunity to attract day trippers, as well as higher yielding overnight short breaks (between 1 - 3 visitor nights per trip), from both Sydney as well as Regional NSW areas.</p>
Accessibility	<p>Lake Macquarie is highly accessible to the surrounding regions, as it is situated alongside the M1 Pacific Motorway, which connects it to Sydney and the Central Coast to the south. In addition, it also acts as a gateway to the Hunter and in particular to Newcastle for road travellers exiting the Motorway.</p>	<p>This provides an opportunity to transform Lake Macquarie into a central 'hub' for visitors who wish to explore Sydney and Regional NSW areas. This could facilitate additional accommodation options developed alongside existing transport links.</p>
Affordability	<p>There are many free and low-cost activities, coupled with low-cost accommodation, making the area a budget to mid-market visitor destination. The free/low-cost activities centre around the natural assets, such as beaches, the Lake and nearby forests. This is particularly attractive for visitors seeking outdoor-based activities, particularly when compared against nearby visitor destinations such as the Hunter Valley (i.e. wine country), or even Sydney.</p>	<p>While the affordability of the area provides a unique selling point and is a key attractor for visitors, this constrains the level of visitor expenditure. There is an opportunity to complement this with more charged activities and provide some higher-end accommodation facilities (without pricing visitors out of the market).</p>
Unique and diverse natural assets	<p>Lake Macquarie has a diverse range of unique natural assets, including:</p> <ul style="list-style-type: none"> • The Lake • Coastline • National Parks • Belmont Wetlands State Park <p>This provides a distinct sense of place and also sets it apart from other coastal or parkland destinations due to the variety of natural attractions.</p>	<p>The opportunity here is to develop a range of outdoor nature/adventure-based activities that cover the beaches and Lake as well as the national and state parks. This could help transform Lake Macquarie into a unique nature/adventure visitor destination.</p>
The Lake	<p>The sheer size and scale of the Lake, which is the largest permanent coastal saltwater lake in the Southern Hemisphere, is an attraction in its own right. This draws visitors for water-based activities and provides a unique landscape coupled with sightseeing opportunities.</p>	<p>The Lake is not being utilised to realise its full potential as a visitor destination. As such, there are opportunities to transform the Lake into 'a stage'. This could include an expansion of the range of aquatic-based recreational opportunities (e.g. boating), or even develop additional infrastructure, such as accommodation or dining facilities along the water (which could also stimulate the night time economy).</p>
Concentration of holiday parks	<p>Consistent with its role as an affordable visitor destination, Lake Macquarie has a high concentration of holiday parks, compared to other areas around the Hunter Region. This is a key attractor for visitors seeking a budget or mid-market 'affordable' holiday</p>	<p>The opportunity here is to promote Lake Macquarie as a holiday park destination for visitors, which could help increase visitation by attracting a variety of visitor markets, including camping and caravan visitors, the family market and grey nomads/over 55s.</p>

Sport and Recreation	<p>Lake Macquarie is often positioned as the 'sport and leisure' capital of the wider region. This is attributed to the quality and range of sporting facilities and sporting events held in the area, which attracts both individual and team participants from across NSW. Examples include surfing and surf lifesaving carnivals, mountain biking, bushwalking, equestrian, athletics, golf, sailing regattas, cycleways and fishing. Major infrastructure includes the Lake Macquarie Regional Football Facility at Speers Point and the Hunter Sports Centre in Glendale.</p> <p>Lake Macquarie's 'adventure tourism' offering is growing, aided especially in recent years by the redevelopment of Lake Macquarie Airport and the activities based there. There are many opportunities for self-guided adventure tourism activities within the area, including 4WD touring, bushwalking, extreme water sports (e.g. water skiing), fishing, kayaking, mountain biking and surfing. There is also a small number of tourism operators offering adventure experiences.</p>	<p>Additional supporting infrastructure could be developed to complement the sporting events held in the area, including:</p> <ul style="list-style-type: none"> • purpose-built accommodation; • state-of-the-art sporting facilities and venues to attract more participants and spectators; and • additional retail and dining opportunities to meet the needs of these visitors.
Shopping/Retail precincts	<p>With nine town centres scattered across the area, including Charlestown Square and Retail Precinct – the largest shopping centre in the Hunter Region – Lake Macquarie offers additional recreational activities that attract visitors from Regional NSW, especially the family market. These products, combined with the natural assets of the area make Lake Macquarie a well-rounded and unique visitor destination.</p>	<p>Lake Macquarie could promote its uniqueness, in terms of variety of tourism product, as its strength. The opportunity exists to also connect its retail precincts with its surrounding natural assets, through innovative interpretation techniques, which would serve to promote its distinct sense of place.</p>
Health facilities	<p>Lake Macquarie includes numerous health services, including several hospitals (public and private), day surgery facilities as well as the provision of specialist advice. This enables the area to attract visitors for health-related issues, particularly from regional and remote areas across NSW.</p>	<p>Supporting infrastructure could be developed to support incoming patients as well as VFR. This could range from additional accommodation facilities close to health care centres, to the provision of strategically located dining and retail products.</p>

5. Visitor market and key source markets

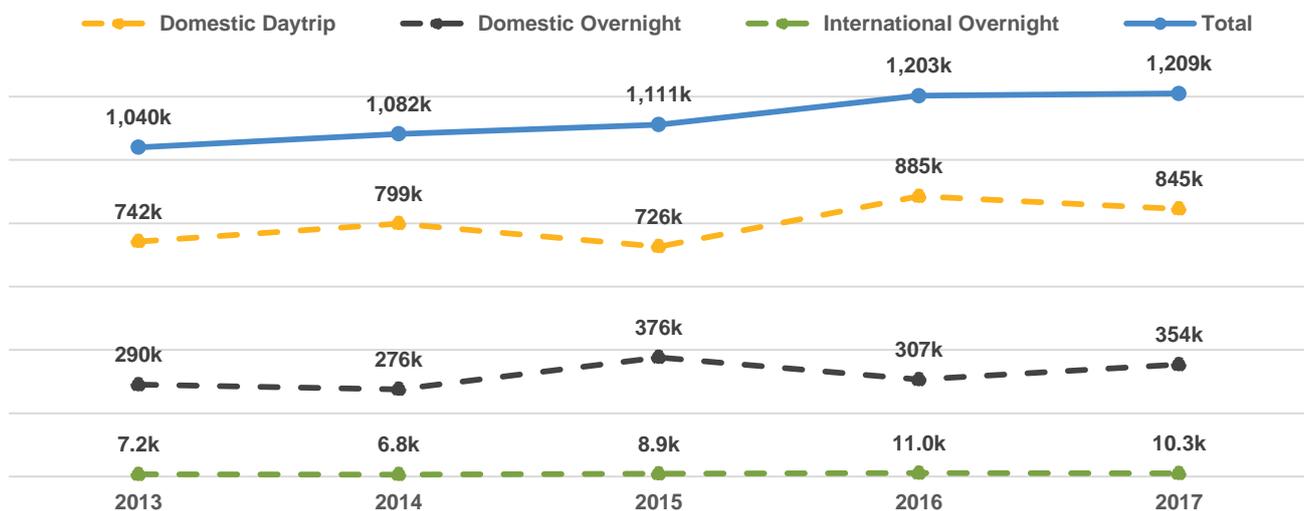
3.5.1. Total visitation

As outlined in Figure 2, Lake Macquarie has received, on average, around 1.1 million visitors per annum (from 2013–2017). In 2017, total visitation was approx. 1.2 million, driven by:

- 70% domestic day trippers;
- 29% domestic overnight visits; and
- 1% international visits.

Based on this data, Lake Macquarie is almost entirely a domestic visitor destination and is a particularly popular destination for day trips, which typically includes visitors from within a two-hour drive of the area.

Figure 2: Visitation to Lake Macquarie (2013-17)⁶



Importantly, Lake Macquarie has experienced strong visitation growth over the past five years, with total visitation increasing by 16%, driven by growth across all three visitor types, including:

- 14% growth in domestic daytrips;
- 22% growth in domestic overnight visits; and
- 44% growth in international visits.

The level of visitation to Lake Macquarie indicates that the area is a reasonably strong and well-established visitor destination.

⁶ International Visitor Survey and National Visitor Survey, Tourism Research Australia, 2017

3.5.2. Key visitor market findings

A comprehensive review of the visitor market can be synthesised into several key findings.

- The visitor market has experienced growth over the past five years, increasing from around 1 million visits in 2013 to 1.2 million visits in 2017 (an increase of 16%). As visitation levels are dominated by the domestic market, Lake Macquarie is currently positioned as a domestic visitor destination.
- Majority of visitation (around 71%) is undertaken by 'low yielding' domestic day trippers, so the opportunity exists to attract more overnight visits, which tend to generate greater levels of visitor spend.
- Visitation is evenly driven by 'holiday' purposes as well as VFR. Although the opportunity exists to convert the VFR market into repeat holiday/leisure visits, which are typically higher yielding and provides greater value to the visitor economy.
- The key activities undertaken by visitors broadly aligns with the key natural assets and visitor economy infrastructure within Lake Macquarie, while the small number of cultural and local activities indicates a lack of 'built' tourist product. This will be considered throughout the DMP when identifying potential opportunities/gaps in the visitor economy.
- In 2016, visitor expenditure totalled \$177 million, representing a 6% increase from 2015 levels, which was driven by domestic visitor expenditure (both overnight and day trippers). This is of particular importance to Council, given the broader state-wide objective to double overnight visitor expenditure between 2010 and 2020. Therefore, to achieve this objective, significant investment in tourism product, infrastructure, marketing and promotion is required continue this trend and grow both domestic and international visitor expenditure in the short-medium term.

For further detail on Lake Macquarie's visitor market, including the above key findings, see Section 2 of Supporting Documentation and Appendices document.

3.5.3. Source markets

Domestic day trippers

All domestic day trips to Lake Macquarie originate from within NSW, with 31% visiting from Sydney, while the remainder is from Regional NSW, including:

- 52% from Hunter Region; and
- 12% from the Central Coast.

Domestic overnight visits

Around 88% of these visitors are from NSW, with the majority originating from Sydney (56%), followed by the Hunter Region (17%) the rest of NSW (16%), while the remaining 12% visit from interstate

International visits

Almost 30% of international visitors come from the UK, followed by NZ (19%), mainland Europe (18%) and Asia (16%, including China). However, it is worth reiterating that these visitors only make up a small proportion – 1% – of total visitation to the area.

Clearly, when focusing on the domestic market, the majority of visitors originate from intrastate, particularly from within a two-hour drive of Lake Macquarie.

The following table summarises some of the key reasons for visiting Lake Macquarie. The key assets and visitor economy infrastructure serve as the main attractors for these visitor markets.

Table 7: Visitor segments and motivations, by source market

Visitor type	Primary source markets	Primary reasons for visiting
Domestic day trippers	Sydney	<ul style="list-style-type: none"> Proximity to Sydney Affordability/Low cost holiday (free of charge activities) Visiting friends and relatives Break from city life (uncrowded) Nature/water/adventure-based activities
	Hunter Region	<ul style="list-style-type: none"> Proximity to Region Affordability/Low cost holiday (free of charge activities) Visiting friends and relatives Retail product Beach and water-based activities
	Central Coast	<ul style="list-style-type: none"> Proximity to Region Affordability/Low cost holiday (free of charge activities) Retail product Visiting friends and relatives
Domestic overnight visits	Sydney	<ul style="list-style-type: none"> Short break Unique waterfront accommodation
	Regional NSW	<ul style="list-style-type: none"> Short break Unique waterfront accommodation Dining opportunities Uncrowded beaches Visiting friends and relatives Nature/water/adventure-based activities
	Interstate	<ul style="list-style-type: none"> Affordability/Low cost holiday (free of charge activities) Visiting friends and relatives Uncrowded beaches Sporting events Business-related
International visits	UK/NZ/Europe/Asia	<ul style="list-style-type: none"> Visiting friends and relatives Affordability/Low cost holiday (for backpackers) Travelling along Pacific Highway from Sydney

6. Market positioning

The market positioning strategy for Lake Macquarie could capitalise on the strengths of its visitor economy to broaden its existing visitor market base, while simultaneously realising opportunities to capture growing and underrepresented markets. By utilising its tourism-based products, activities and infrastructure, Lake Macquarie could market itself to a variety of different visitor segments and grow the visitor economy.

3.6.1. Key Target markets

To grow the visitor economy, Lake Macquarie needs to position itself to a number of target markets that draws on its assets and key strengths as a visitor destination. As such, we have identified several visitor market segments that are considered to reflect the markets already being captured by Lake Macquarie as well as those which present opportunities for the region to focus on. These are defined as Lake Macquarie's target markets.

Where possible, we have tried to obtain visitor segment data at a regional level for the Hunter region. For those segments or visitor markets where data was not able to be provided, we have used NSW state-wide data or Hunter region data to illustrate market characteristics and trends.

Table 8: Lake Macquarie key visitor target markets in order of importance⁷

Visitor market	Why target?
 Visiting friends & relatives (VFR)	<ul style="list-style-type: none"> • Already one of the primary purposes of visits to Lake Macquarie and a key driver of visitation (for both domestic and international markets) • Potential to target both visitors and their hosts (friends or relatives) • Potential to transform into repeat visitation for holiday/leisure purposes
 Family market	<ul style="list-style-type: none"> • Lake Macquarie appeals to the family market as a low-cost holiday destination, that is easily accessible from several metropolitan centres • Attracted to the Lake and coastline, uncrowded beaches and diverse range of activities
 Short breaks	<ul style="list-style-type: none"> • The proximity to Sydney, Central Coast and Newcastle (all easily accessible via the motorway) makes the short break market an ideal target
 Nature tourism	<ul style="list-style-type: none"> • A natural fit with the area, in terms of the unique and diverse natural assets (the Lake, coastline and national parks) • Includes visitors participating adventure-based outdoor activities relating to nature (e.g. 4WD touring, abseiling/rock climbing, bushwalking, extreme water sports (e.g. water skiing), fishing, kayaking, mountain biking, scuba diving, surfing) • Focus on domestic market but potential to leverage off international visitors travelling along the M1 Pacific Motorway from Sydney
 Over 55s (incl. grey nomads)	<ul style="list-style-type: none"> • A growing market that is less constrained by seasonality • Attracted to Lake Macquarie's accessibility and proximity to major metropolitan centres • Attracted to the beach lifestyle, nature-based outdoor activities and low-cost accommodation facilities
 Caravan & camping	<ul style="list-style-type: none"> • Attracted to the high proportion of holiday parks in the area • Appeals to their love of nature and outdoor activities

⁷ These visitor segments align with Destination New South Wales' market segmentation, each of which are based on areas of interest, demographics and purpose of trip.

3.6.2. Visiting friends and relatives

Overview

The VFR market is a crucial visitor market for Lake Macquarie to target. They provide a valuable contribution to the visitor economy and, because they are exposed to the visitor economy, the opportunity exists to convert VFR into repeat holiday/leisure visitors.

Positioning strategies

Because the driving factor behind VFR visitation is to see family and friends (i.e. residents of Lake Macquarie), VFR visitors are strongly influenced by their hosts. Therefore, positioning for this market relies on communicating with local residents and promoting:

- a sense of pride for the area;
- the range of activities/experiences on offer;
- the key visitor economy supporting infrastructure (e.g. accommodation facilities, visitor information centres); and
- the importance of tourism to the local economy and the benefits it could create for Lake Macquarie's residents.

In addition to this, local businesses could provide a good avenue for promotion and referrals for visitors and, therefore, could be informed about the tourism products across Lake Macquarie.

3.6.3. Family market

Overview

The family visitor market includes any domestic trips taken by NSW families. We note the importance of this market for Lake Macquarie due to its affordability, diverse range of experiences and proximity to major metropolitan centres (such as Sydney and Newcastle).

Positioning strategies

Lake Macquarie could position itself to the family market as a traditional coastal/aquatic holiday destination, which is easily accessible from nearby locations. It could provide a basic, affordable, yet diverse experience that ranges from outdoor/beach activities along the coast to retail/entertainment activities throughout its multiple town centres. In addition, it provides a range of dining experiences that are family-friendly, which also helps stimulate the night economy.

3.6.4. Short breaks

Overview

Short breaks are an important part of the visitor economy for NSW as well as Lake Macquarie. According to a recent study into Australia's travel market, "short breaks have become the new norm as Australians look to break free from the frenetic pace of everyday life and find space to be themselves away from the pressures of home – domestic holidays could offer a safety net to Australians with easy and affordable trips at home". Domestic short breaks are often a mix of planned and spontaneous trips, spread across the year to provide milestones to look forward to.

Fundamentally, the short break market is characterised by couple's getaways of around 1-3 nights, usually for a "weekend getaway" or "midweek break". This is an important visitor segment for Lake Macquarie, as it appeals to visitors from proximate metropolitan centres seeking a break from 'city life' provides a snapshot of this market.

Positioning strategies

Lake Macquarie's location, its natural aquatic and park features and landscape provide the core elements to be able to position itself to this market. It could focus on these strengths and promote itself as a romantic destination, close to Sydney Newcastle, that offers:

- the opportunity to relax and 'escape' city life by experiencing its stunning landscapes and diverse natural assets;
- unique waterfront (i.e. boutique) accommodation;
- entertainment and retail opportunities in its town centre; and
- a variety of dining experiences to indulge the visitors.

3.6.5. Nature tourism

Overview

Nature-based tourism forms a significant component of Australia's visitor economy; our biggest strength is our world-class nature. Nature-based tourism is leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities – from bushwalking in national parks to going to the beach.

While nature-based tourism is not a term that is commonly used by visitors (as it is not seen to be a type of holiday in its own right), it is a term of value to industry in the context of describing visitor desires, experiences and activities. Nature-based experiences are intimately linked to all other aspects of the visitor's total experience of a destination, such as food, culture, relaxation, health, escape, family needs, accommodation and transport. All serve to complement each other and together form the basis of a visitor's overall satisfaction with their holiday.

The nature-based visitor market presents the largest opportunity for the Lake Macquarie visitor economy, as it closely aligns with its diverse natural assets and key features.

Within nature tourism, Lake Macquarie's offering for adventure-based outdoor activities is growing. There are many opportunities for self-guided adventure tourism activities within the area, including 4WD touring, bushwalking, extreme water sports (e.g. water skiing), fishing, kayaking, mountain biking and surfing. There is also a small number of adventure tourism operators offering experiences in pursuits such as abseiling/rock climbing, jet boating, horse riding and scuba diving.

Positioning strategies

Lake Macquarie has the potential to attract the nature-based tourism market, both domestic and international, particularly through its diverse and unique natural assets (the Lake, coastal areas and national and state parks). It has the opportunity to promote itself as an affordable and easily accessible destination for adventure seekers and nature-enthusiasts, seeking an authentic experience.

It could also combine these experiences with related entertainment opportunities in the retail precinct (particularly in the evening/night time), to offer a well-rounded visitor experience.

3.6.6. Over 55s (incl. grey nomads)

Overview

The over 55s market is expanding in line with Australia's aging population. Comprised of a large proportion of retirees, this visitor market segment is strong in terms of financial capability. Across Australia, the over 55s market hold almost 32% of the nation's gross disposable income.

In addition, this market is more likely to be 'happier'/satisfied in life, not worried about money and experiencing an enjoyable and rewarding phase. This market increasingly tries to stay healthy, get fitter, spend more time with the grandchildren, read more, watch more movies, become more IT-literate, and, importantly, travel.

Positioning strategies

Lake Macquarie has the ability to promote itself as an ideal destination for the Over 55s market, by positioning itself as a central, convenient hub from which they could explore the wider Hunter and Central Coast Regions. It could promote the central hub idea by highlighting supporting infrastructure, including the high concentration of affordable holiday parks; and entertainment/retail products that are located within its town centres.

In addition to the idea as a central hub, Lake Macquarie could also promote its diverse experiences, from relaxing coastal and scenic landscapes to outdoor and adventure based activities (e.g. fishing, walking, cycling, etc.)

3.6.7. Caravan and camping

Overview

The Australian caravan and camping industry is forecast to grow, with a number of trends supporting this such as the number of campervan/motorhome registrations and a substantial increase in the number of motorhomes manufactured.

Positioning strategies

Lake Macquarie could easily cater to the 'traditional' caravan and camping market by promoting its high concentration of affordable holiday parks, as well as free camping sites along the Watagan Mountains. Its unique selling point as a caravan and camping destination is its location and accessibility, which enables Lake Macquarie to serve as a central hub from which visitors can explore the wider Hunter Region.

The Council could also provide a diverse range of outdoor experiences, ranging from coastal/aquatic activities to national park activities such as bushwalking. However, there seems to be an opportunity to expand its camping offer and attracting the growing glamping market. This could be achieved through the provision of upscale camping facilities and boutique outdoor experiences (e.g. concerts, markets).

3.6.8. Secondary niche markets

In addition to the target market segments, Lake Macquarie could grow its visitor economy by capturing a variety of different secondary niche markets, that are generally experiencing growth or are often underrepresented.

Sports/adventure tourists

As highlighted in key strengths and opportunities (Section 3.4), Lake Macquarie is seen as the sport and leisure capital of the wider region. This is the result of the quality and quantity of sporting facilities, such as the new Lake Macquarie Regional Football Facility, which can host a variety of sporting events attracting both individuals and team sports participants.

In 2015, the number of visitors to the Hunter region participating in sports-related activities totalled 1.2 million, driven by 94% domestic visitors and 6% international⁸. Of the domestic visitors, 43% were day trippers and 51% were higher-yielding overnight visits⁹. This represents a 5% growth (or 52,000 visits) since 2010¹⁰. Although limited data is available for Lake Macquarie, the Hunter region provides a useful indication of visitor trends to Lake Macquarie.

Sporting facilities in Lake Macquarie are increasingly being used for major regional, state and national sporting events, as well as training facilities, which attract visitors to the area in the form of participants and supporters. The City has also showcased its ability to host international events, demonstrated by its successful hosting of the 2014 International Children's Games; the largest sporting event the area has hosted to date.

As Lake Macquarie increases its ability to attract sports-related visitors and consolidates its position as the sporting capital of the area, it could use this visitor market to grow the visitor economy and also promote itself as a leading sports destination.

⁸ Tourism Research Australia, International and National Visitor Survey, 2015

⁹ Ibid

¹⁰ Ibid

Shopping tourism

With a range of different shopping centres located throughout its town centres, including Charlestown Square, which is the largest shopping centre in the Hunter region, Lake Macquarie could appeal to the regional shopping market. Having retail services and products, including fashion boutiques, food and wine, gifts and toys and major supermarkets, represents an attraction for visitors from more remote and rural areas, as well as shopping tourists from the Lower Hunter Region. It also provides additional recreation activities for families and provides an alternative experience in adverse weather and during the low season.

Lake Macquarie is in the unique position to be able to combine its shopping experiences with its natural coastal and parkland assets, which sets it apart from other shopping destinations in the wider region.

Business/Conference market

Lake Macquarie could also position itself as a regional destination for the conference market, attracting both local businesses as well as regional small to medium businesses (from Sydney, Newcastle.) seeking a corporate getaway. There is a small to medium range of suitable conference venues that cater to this market, including the Belmont 16s, Caves Beach Function Centre and any one of the seven RSL Clubs located within Lake Macquarie. There is potential to grow this market and work with Council and the State Government to enhance the area's offering of small to medium business conferencing product.

Cultural and heritage tourism

Although not traditionally a destination for cultural and heritage visitors, the opportunity exists to grow this underrepresented market, particularly during the low season, to expand the visitor economy. As demonstrated in Figure 8 in Supporting Documentation, the number of cultural/heritage activities undertaken by domestic tourists, in particular, demonstrates the lack of cultural tourist product and opportunity to fill in this market 'gap'. This visitor market is an important one to focus on, in terms of value to the visitor economy, as they are a large market (particularly in major metropolitan centres); are typically high-yielding and less constrained by seasonality.

In 2016, there were 12.3 million international and domestic cultural visitors to NSW; the majority were domestic day trippers (42%), domestic overnight visitors (37%) and international visitors (21%)¹¹. The Hunter Region comprises over 2.8 million visitors (23.1% of the total market), demonstrating that the region already holds some appeal for culturally minded tourists.

Lake Macquarie already has a number of cultural attractions and heritage sites dispersed across the area, ranging from galleries, museums and public collections (see Lake Macquarie product audit contained in Supporting Documentation and Appendices document). In addition to providing more cultural/heritage product, these existing attractions could also be promoted to target a greater number of cultural and heritage visitors. In addition, the City is trying to grow in this area for residents and visitors alike, demonstrated through the recent release of its *Arts, Heritage & Cultural Plan (2017-2027)*, which seeks to increase the production, exposure and enjoyment of arts and culture throughout the area.

¹¹ Destination NSW, Cultural and Heritage Tourism to NSW, 2016

Accessible tourism

With around 25% of the NSW population having a disability or being over 65 with limited mobility, accessible tourism is a large and often underrepresented market. Accessible tourism is about making it easy for all people, particularly those with limited mobility, to enjoy tourism experiences.

Lake Macquarie is an ideal destination for this market as it is close to Sydney, the terrain is relatively flat (particularly around the Lake) and easy to access, and there are a number of suitable disability services, facilities and experiences (see Lake Macquarie product audit contained in Supporting Documentation and Appendices document).

Most of these services currently link with the City's natural features, providing accessible sailing, boat ramps as well as park facilities. There is also the possibility to grow this market through partnerships with regional organisations to offer experiences and events for disabled people across the area.

In addition, to further grow this market, the City would need to improve supporting infrastructure and create more disabled access points, ensuring ease of access to tourism products, such as additional boat ramp access on the Lake; accessible accommodation/holiday parks, and disabled access to retail facilities.

7. Opportunities and gaps in supply

Opportunities for strengthening Lake Macquarie's visitor economy have been identified through the DMP process, including industry consultation (details in Supporting Documentation and Appendices document), a review of Lake Macquarie's key strengths, as well as existing key assets and key infrastructure. These opportunities, based on gaps in supply and preferences of the target markets, are addressed under the following categories:

- Nature-based/Adventure product
- Cultural and heritage product
- Major events/festivals
- Supporting facilities
- Governance
- Marketing and promotion

For many of the opportunities listed below, there is a need for more detailed market research and analysis to determine its feasibility.

3.7.1. Nature-based/adventure product

One of the major activities undertaken by visitors involves nature-based experiences that utilise the diverse natural assets throughout the area, including Lake Macquarie (the Lake), Watagans National Park to the west and the coastal areas to the east.

In addition, the key target markets (VFR, caravan and camping, nature-based, over 55s and overnight short breaks) are often keen to find a product offering a mixture of passive and active recreational (land and/or water based) pursuits they could undertake as part of their visit to the region.

Therefore, the opportunity exists to grow the visitor economy by activating some of these locations to increase both commercial and non-commercial tourism activity.

Activate the Lake

Industry and Council consultation both recognise the lack of visitor experiences and activities on the Lake. Part of this is due to the highly seasonal nature of visitors to the Lake, which detracts operators from developing new product/infrastructure; while another reason for this is bureaucratic, whereby the volume of environmental rules and regulations have historically constrained the ability of operators (and Council) to introduce commercial tourism options on the Lake.

Despite this, both industry and Council identified a 'wish-list' of future tourism opportunities for the Lake, which could be explored in the event that existing rules and regulations are relaxed. This includes the following products and activities.

- Daily ferry service that transports visitors across the Lake (west-east and/or north-south), as well as scenic trips/tours around the Lake. This could involve a 'hop on/off' format so visitors (and residents) are able to access different points on the Lake and easily travel across the City (which is currently limited to road access around the Lake's perimeter).
- Regular cruise ship service that travels from other major ports (e.g. Sydney) to the Lake, transporting a whole new visitor segment to the area.
- Private charter boats, as well as hire boats, for various activities (sightseeing, fishing to appeal to visitors seeking an outdoor, nature-based experience).
- 'Over-lake' dining options on jetties/piers/marinas that overlook the Lake, or on specialised boats allowing for dining on the Lake.
- Water-based activities, ranging from more adrenaline-focused (e.g. jet skiing, paragliding) to more family-friendly (e.g. canoeing, kayaking).
- Development of marinas/jetties/moorings on the eastern side of Lake, improving access to the Lake and also enhancing connectivity to nearby beach/coastal areas.
- Harnessing the development opportunities on the western side of the Lake (e.g. Trinity Point Marina) and increasing visitor flow to the 'parkland' side of the Lake, while also enhancing connectivity between the eastern and western sides of the Lake.
- Additional commercial waterfront facilities, such as retail, dining (e.g. fine dining, wine bars) and hire facilities, could help improve visitor yield.
- On-lake cultural/aquatic events (e.g. 'Float your Boat' or the Offshore Superboat Championships).

Coastal areas

In addition to the Lake, the coastal areas (specifically the patrolled beaches) are a popular key natural asset that attracts a large proportion of visitors to the City. As such, some of the more commercially focused activities mentioned above could also be investigated for the coastal areas, including:

- linkages with marina development on the eastern side of the Lake;
- more private charter/hire boats (for sightseeing, fishing);
- more commercial water-based activities (e.g. jet skiing, paragliding, canoeing, kayaking); and
- commercial waterfront facilities (e.g. retail, dining and hire facilities).

Watagan National Park

The Watagan National Park, to the west of the City, is an important attractor for nature tourism and a key asset for Council, as it is less seasonal and weather-dependent than the aquatic attractions. However, there is a lack of facilities and commercial tourism options in the area, providing an opportunity to introduce free and charged product, such as those listed below.

- Visitor facilities, including improved signage, walking trails, mountain bike trails, interpretation facilities and supporting commercial facilities (cafe, retail) across the national park.
- Glamping experiences, which appeal to the nature-based and short break visitor market in particular. This product also tends to be high-yielding and is boutique in nature.

- The major nature-based outdoor attraction that utilises the national park landscape, involving any one (or more) of the following elements: zipline, treetop walkways, climbing/abseiling, luge. This could serve as a signature attraction in the west of the City, appealing to a mix of visitor segments, including the VFR, caravan and camping market segments among others who are known to have the disposable income to spend if there were more charge for experiences available in the region.
- Eco tourism experiences to highlight the uniqueness of the national park environment.

It is worth noting, however, that the national park is controlled by the NSW National Parks and Wildlife Service (NPWS), who are traditionally less focused on tourism development and more focused on preservation. Therefore, Council (and industry) would need to collaborate with NPSW in order to introduce commercial tourism options.

'Hidden treasures' locations

Consultation with Council and industry stakeholders also identified a number of natural attractions that are unique to Lake Macquarie but are currently being underutilised due to lack of any facilities or information available to facilitate visitation. With the development of infrastructure and/or marketing tools, these attractions would be valuable additions to the Lake Macquarie destination.

- Sea caves (Caves Beach) – supporting infrastructure
- Belmont wetlands – improved access and signage
- World War II heritage – embed tourism elements in Rathmines Master Plan
- Rock pool and platforms – highlighting the biodiversity of birdlife and their habitat
- Historical coal mining sites – potential new product offering, including tours of the site
- Lake Macquarie 'stories' – promoting key moments in Lake Macquarie's history

3.7.2. Cultural and heritage product

Although Lake Macquarie is not a traditional destination for cultural and heritage tourism, Council and key industry stakeholders have identified this niche market as a potential opportunity to improve the visitor economy. Cultural and heritage visitors are an important market segment to focus on, as they are typically high-yielding and less constrained by seasonality, providing value to the visitor economy year-round. In addition, providing more cultural/heritage tourism product offers an alternative to weather-dependent activities, such as the beaches and Lake, that are the hallmark of the current visitor economy.

The following cultural/heritage tourism opportunities could be explored, most of which provide linkages and added interpretation to the existing natural assets of the region. These opportunities would be designed to strengthen the current cultural/heritage offer, as detailed in the product audit.

- Museums/interpretation centres strategically located around the Lake, each of which provides a different story relating to the history and heritage of Lake Macquarie, including the boating industry, mining, local indigenous culture and surfing.

- A major performing arts centre/cultural complex, which is recognised regionally and statewide, attracting artists and visitors alike. Not only could this increase visitation, but it would help promote the area as a culturally significant destination.
- Free and charged art galleries, including dedicated workspaces, to attract more artists to the City, focusing on different art types, including an Aboriginal art gallery or contemporary art gallery.
- An extension of the Lake Macquarie City Art Gallery to include outdoor programming and extra exhibition space for Aboriginal/local collection content.
- Street beautification and public art work across the City, to regenerate some of the tired, outdated infrastructure and make it more appealing to visitors and residents. This could link back to nature, with an environmental interpretation theme, as well as a culturally based Aboriginal heritage theme.

3.7.3. Major events/festivals

In addition to opportunities for specific products, the potential exists to introduce more events/festivals to complement the natural assets, particularly the Lake, in order to broaden the visitor base. The Lake is the ideal focal point for events, due to its scale, close correlation with the City's 'brand' and ability to provide a distinct sense of place.

The research and consultation identified a lack of suitable events for Lake Macquarie, which constrains its visitor economy but also does little to promote its brand. Therefore, we suggest the following be investigated for inclusion in the City's events calendar, as they are a key attractor for both overnight visitors and day trippers, and help increase 'destination awareness'.

- A major, flagship event centred around the Lake (building on the existing Float your Boat, Lake Mac Big Weekend + Offshore Superboat Championships and the Rathmines Catalina Festival)
- Nature-based festivals located along the Lake, such as a sailing festival, boating festival, sustainability festival (e.g. Living Smart Festival)
- Smaller, culturally based festivals, including an artist festival, film festival
- Additional sporting events (national and regional), building on the strength of the sports/adventure tourism market, including gymnastics, BMX, soccer, netball, the Hunter Track Classic (recognised in December 2017 as one of Australia's best single-day athletics meets by All-Athletics World Rankings) and surfing
- Music festivals at Warners Bay and Rathmines and Speers Point Parks

3.7.4. Supporting facilities

The following products and facilities are designed to support the activities, experiences, and attractions identified above.

Accommodation

While there is a high concentration of holiday parks throughout the City, attracting the caravan and camping market, among others, the City could be strengthened with a more diverse range of accommodation catering for a variety of visitor types. As such, some options for accommodation facilities are outlined below.

Large scale branded hotel/resort accommodation (minimum four stars). This accommodation type has the potential to improve Lake Macquarie's branding as a visitor destination, while also appealing to a high-yielding visitor market, including the family market and short break visitors. Ideally, this hotel/resort would be located on the waterfront, either Lake or beachside, to maximise its attractiveness for visitors. The accommodation could also include:

- a conference facility to attract the business/conference tourism market and larger events, such as conventions and festivals, that are not currently held in the area due to lack of infrastructure;
- a spa/wellness centre, of regional significance, appealing to the short break market, particularly the Greater Sydney market, the positioning of which could be strengthened given the natural and environmental focus of the area; and
- a golf course, which could help strengthen the City's branding as the region's 'sport and leisure capital'.
- Boutique hotel accommodation that provides a tailored, unique visitor experience could help increase penetration from the short break market, while also providing a variety of options for overnight visitors.
- Budget to mid-range motel accommodation, strategically located on key transport links (Pacific Highway, M1 Pacific Motorway) to capture travellers between Newcastle, the Hunter Valley and Sydney. It could also serve to capture visitor overflow from the Hunter Valley wine region during peak season.

Tourism hub

Lake Macquarie's visitor economy is currently constrained by the lack of a focal point for visitors and residents alike. The City is highly dispersed, across more than 90 communities, with nine town centres. As such, stakeholder consultation identified the need for a **dedicated tourism hub**, to be located in one of the town centres, to provide a variety of services/products for visitors, including:

- accommodation facilities;
- conference and event venue;
- open public spaces for outdoor events/festivals and public gatherings;
- visitor amenities, such as an information centre, bookings for visitor experiences, guides and maps;
- dining facilities;
- retail facilities; and
- entertainment products, ideally indoor-based and family-friendly experiences, such as cinemas and bowling.

A central tourism hub is an important attractor for the family and short break markets (among others), as it diversifies the visitor experience beyond the natural environment, as well as introducing a focal point for commercial tourism products. It could also benefit residents by providing a variety of public services, including public libraries and community centres.

Most of these activities/products could be activated in the evening to help stimulate the night-time economy. More evening-based activities are needed to encourage growth in the overnight visitor market and help change the perception that Lake Macquarie is a day-trip destination only. In addition, more night-time and family-friendly facilities and activities are needed to improve overall visitor yield and help grow the visitor economy.

3.7.5. Governance

To facilitate growth in the visitor economy, a robust governance framework is required to facilitate and enable tourism investment opportunities. Currently, there are four bodies that invested in the promotion and growth of Lake Macquarie's visitor economy.

- **Lake Macquarie Tourism (LMT)**, funded by Council and run by Council staff to promote Lake Macquarie as a visitor destination. This includes the Lake Macquarie Visitor Information Centre, located at Swansea;
- **Lake Macquarie Tourism Consultative Committee (TCC)**
- **Dantia** – the economic development company for Lake Macquarie
- **The Lake Macquarie Business Visitor Economy Committee (LMBVE)**, which includes industry stakeholders that have a special interest in local business and the visitor economy

These groups meet on a semi-regular basis to discuss the current state of the visitor economy and future opportunities for growth. The opportunity exists for these bodies to continue to work together – in the form of a Working Group – to best support Lake Macquarie as follows:

- Council (through LMT and TCC) needs to be a facilitator and enabler of investment in tourism, working in tandem with industry (through the TCC)
- Representing both industry and Local Government, in order to coordinate efforts to maximise opportunities, while aiming to reduce issues and concerns associated with the development of tourism in the area
- Undertake joint initiatives to promote tourism to the LGA
- Raise awareness of the value and benefits of tourism that will accrue to the community
- Provide a forum to share and develop ideas to build synergies between operators

As part of this process, both groups could initially focus on the challenges and opportunities identified in the DMP.

3.7.6. Marketing and promotion

To enhance the marketing and promotion of Lake Macquarie as a visitor destination, the following initiatives are suggested to improve brand recognition and encourage stronger stakeholder buy-in and support.

- Highlight the key strengths of Lake Macquarie when positioning the destination to the market, including proximity to Sydney, natural assets, sport and leisure capital of the region
- Improving profile and wayfinding via sea, land, rail and air.
- Providing a greater sense of identity – through a slogan and/or advertising campaign – that differentiates Lake Macquarie from Port Macquarie, as well as surrounding regions (Central Coast, Newcastle)
- Identify partnership opportunities with Newcastle and the Hunter region, including tourism ‘packages’ to generate greater demand, as well as bidding for major and regional sporting events that cover multiple regions.

8. Key stakeholders

Key partnerships will be crucial to meet the target of doubling the size of Lake Macquarie's visitor economy by 2020. The following key stakeholders will form part of the partnership to achieve this target:

Lake Macquarie Tourism Consultative Committee

The primary roles of the Lake Macquarie Tourism Consultative Committee (LMTCC) are as follows:

- Promote an inclusive approach to the marketing of Lake Macquarie as a destination
- Provide issue-specific advice and comment to Council in relation to the Lake Macquarie DMP
- Liaise and provide advice to Council on issues relating to Lake Macquarie tourism
- Work to promote Lake Macquarie as a tourist destination
- Identify opportunities for support from Council and other agencies to assist with tourism promotion
- Represent tourism operators in the City and discuss future needs of tourism operators

Dantia

Dantia is the economic development company for Lake Macquarie, and works to attract business, investment and employment opportunities to the City. Dantia was established by Lake Macquarie City Council as the best model for delivering innovative economic growth and development. The vision for the City is to create vibrancy and prosperity through sustainable economic growth and increased employment opportunities, building on existing strengths and targeting emerging industries to expand development in the City while balancing the lifestyle and environmental aims of the community.

Lake Macquarie Business and Visitor Economy (LMBVE)

In 2013, several local business chambers amalgamated to form Lake Macquarie Business – a group of business owners and community leaders from around the Lake. Their vision is: *'An engaged business and community working together making Lake Macquarie a greater place to work, live, visit and do business.'*

9. Key imagery and footage

3.9.1. Brand

The Lake Macquarie Tourism 'Love the Lake' brand campaign developed in 2009 aimed to build the profile of the City. This brand initiative was the start of an ongoing brand campaign for Lake Macquarie Tourism. The campaign succeeded in achieving its objectives by growing visitor numbers both to the area and online. Visitor numbers and overnight stays have increased directly as a result of the campaign.

To continue the success of the Love the Lake brand campaign, the second phase of the campaign was named, 'Lots to Love. Love the Lake'. This second phase was launched in March 2012. The Lots to Love, Love the Lake campaign won the Destination Marketing category at the Hunter Central Coast Tourism Awards in 2013, and was awarded Bronze in the Destination Marketing category at the NSW Tourism Awards the same year. See Figure 3 below for an example of the Love the Lake branding applied to the Lake Macquarie Tourism visitor publications.

Figure 3: 2017 Lake Macquarie Tourism Publication Covers – Visitor Guide and Map and lifestyle guides



3.9.2. Imagery and footage

Lake Macquarie Tourism possesses a bank of high-resolution imagery, a high-resolution promotional video and television commercials promoting the area. The image bank and video footage portray Lake Macquarie as a complete destination, combining a wide range of scenic destination imagery and appealing action-style shots.

In accordance with DNSW funding agreements, Lake Macquarie Tourism's image bank, online video and TVC have all been made available to DNSW for use in their promotional activity.

Figure 4: Lake Macquarie Tourism Image Bank Examples



10. Key communication channels

A wide range of communication channels that combine both traditional and innovative digital solutions are required to successfully reach target market segments. Table 9 outlines the key communication channels, and assesses their advantages and disadvantages.

Table 9: Key Communication Channels

Channel Type	Coverage	Profile	Advantages	Disadvantages
Visit Lake Mac Website (visitlakemac.com.au)	The official destination website for Lake Macquarie	<i>visitlakemac</i> received close to 120,000 unique visitors in 2016.	<i>visitlakemac</i> is ranked third when searching for 'Lake Macquarie' (after the Lake Macquarie City Council website and <i>visitnsw</i> page for Lake Macquarie) and first when searching for 'Lake Macquarie tourism' and 'Lake Macquarie information'.	A large percentage of content is operator-managed (through the Partnership program), resulting in missing or out-of-date information.
Lake Macquarie Visitor Information Centre and freecall 1800 number	Lake Macquarie Visitor Information Centre (VIC) provides friendly, personalised service in person and to customers via phone and email.	The Lake Macquarie VIC was visited by over 20,000 customers in 2016.	VIC staff are able to customise service to assist the customer where online research has not provided what they were looking for.	Increasing numbers of consumers are relying purely on online research instead of visiting the VIC.
Lake Macquarie Tourism Publications	Lake Macquarie Tourism produces the official Lake Macquarie Visitor Guide and Map and the following lifestyle guides: Walking Trails; Shared Pathways; Parks, Picnics and Playgrounds; Kayaking Trails; Fishing Guide.	Each year Lake Macquarie Tourism prints and distributes over 30,000 Visitor Guides and Maps to consumers and other Visitor Information Centres across NSW.	The visitor publications are important tools that enable visitors to carry information on the area with them, without relying on access to digital modes of communication. The publications are also an important tool for older visitors not savvy with digital technology.	Printing costs of publications are a relatively high reoccurring cost each year.
Social Media, including: <ul style="list-style-type: none"> • Facebook (facebook.com/visitlakemac) • Instagram (@lakemacquarietourism) • Twitter (@visitlakemac) • #lovelakemacquarie 	Lake Macquarie Tourism's social media channels provide visitors (and locals) an additional online channel to connect with the Lake Macquarie Tourism brand.	LMT's Facebook and Instagram follower numbers continue to grow, with almost 7000 'Likes' on Facebook and over 2200 Instagram followers as of May 2018.	Social media affords LMT the ability to communicate directly with consumers who are passionate about Lake Macquarie, building relationships and our brand personality.	Social media is a 24-hour interactive medium where staff need to monitor the accounts outside official work hours, hence a consistent approach can be difficult to coordinate.
Digital Media, including: <ul style="list-style-type: none"> • TripAdvisor 	LMT utilises a range of digital communication	TripAdvisor is a highly influential travel website attracting over	Digital marketing and communication is cost-effective and highly	Digital technology is rapidly advancing and it is

<ul style="list-style-type: none"> • The LMT Walking and Kayaking Trails mobile website • Visit NSW website (visitnsw.com) • Digital Marketing 	<p>channels outside visitlakemac and social media. LMT has a Premium Destination Partnership with TripAdvisor, affording LMT the opportunity to present customised content to the highly engaged TripAdvisor audience.</p>	<p>390 million unique users a month, while visitnsw is a highly ranking website, ranking above visitlakemac on Google when searching for 'Lake Macquarie'.</p>	<p>measurable, providing insight into which elements of a campaign work particularly well and where improvements can be made.</p>	<p>difficult to stay up-to-date with the latest trends and improvements.</p>
<p>Traditional advertising mediums – print, TV and radio</p>	<p>Utilising a range of traditional advertising mediums provides LMT with a wide reach across a range of different target audiences. LMT has a high-definition, visually impressive TV commercial (TVC) that is available in both 15 and 30 second formats.</p>	<p>Television advertising reaches a wide range of consumers, while print advertising offers the opportunity for niche targeting via reputable publications relevant to the area's target markets.</p>	<p>The traditional advertising mediums offer high profile and visible advertising with an element of prestige (especially in television advertising and glossy publications).</p>	<p>It can be difficult to measure the direct results of traditional one-way advertising.</p>
<p>Consumer and trade shows</p>	<p>Lake Macquarie Tourism distributes the visitor publications in addition to specialised information that is targeted to the audiences at a range of consumer and trade shows each year.</p>	<p>Recent examples of consumer show attendance include over 60,000 attendees at the 2017 Caravan, Camping and Holiday Supershow and 63,000 attendees at the 2017 Sydney International Boat Show.</p>	<p>Destination exposure to large numbers of engaged consumers, able to form personal connection with consumers.</p>	<p>Number of information packs distributed equating to area visitation is difficult to measure.</p>
<p>Lake Mac Holiday Parks website</p>	<p>The Lake Mac Holiday Parks website promotes Council's four holiday parks with an online booking capacity as well as additional content and information the Lake Macquarie area.</p>	<p>The Lake Mac Holiday Parks website received 131,000 unique visitors in 2016.</p>	<p>Modern, easy to use website with instant online bookings for Council holiday parks</p>	<p>Lack of replication of Holiday Parks bookable product from their own website onto visitlakemac, the area's official destination website</p>

4. Destination Direction

1. Focus

The future direction of Lake Macquarie as a visitor destination, including the development of tourism product and supporting infrastructure, is outlined in the DMP. The DMP explores the key aspects of the visitor economy, including strengths and opportunities, focusing on areas where tangible benefits and advances could be achieved, including, but not limited to:

- accommodation;
- target markets and growth/underrepresented markets;
- positioning/marketing opportunities; and
- tourism product/experiences.

The changes and actions proposed through this DMP will need to align with Council's vision, mission and strategic priorities, ensuring a consistent, coherent approach to growing the visitor economy, which could be pursued by relevant stakeholders.

2. Vision

The vision for Lake Macquarie Tourism is to:

Transform Lake Macquarie into a recognised visitor destination both nationally and internationally.

3. Mission

The mission for Lake Macquarie Tourism is to:

Highlight the differentiating features of Lake Macquarie and provide the necessary product and infrastructure to support the visitor economy.

4. Key strategies

The following strategies are designed to support growth in the Lake Macquarie visitor economy and facilitate the achievement of the DMP's vision and mission.

1. **Deliver unique visitor experiences to enable growth in tourism.** To achieve this strategy, the focus will be on the key areas that best identify with the Lake Macquarie brand and provide a strong sense of place.
2. **Develop innovative techniques to increase Lake Macquarie's exposure.** The focus here is to promote Lake Macquarie – domestically and internationally – using digital and social media forums.
3. **Consolidate existing visitor segments and broaden the visitor market base.** This strategy focuses Lake Macquarie's branding and marketing strategies, while also introducing a more comprehensive events calendar – focused on the Lake – to complement the tourism product/infrastructure.

To achieve these strategies, we have developed a list of practical, realistic actions that have been included in an Action Plan (see Section 4.5 below).

5. Action plan

Table 10 details the new actions arising out of the 2018 DMP, aligning with the new strategies and categorising each project according to marketing and promotion, product-based initiatives and infrastructure-based initiatives

These actions are based on updates to the product audit, industry consultation and identification of opportunities and gaps. Some of the new actions purposefully overlap with previous actions, detailed in Supporting Documentation (Previous actions listed in the 2013 DMP). However, this is done to strengthen and consolidate existing actions that are still relevant to Lake Macquarie, rather than trying to ‘reinvent the wheel’. Where overlap occurs, the recommendation is for new actions to supersede previous ones.

For definitions of the terms used in Table 10, please see lists following the table.

Table 10: New actions to support strategies in 2018 DMP

Number	Action	Strategy	Time-frame	Resourcing	Responsibility	Aim
1. Marketing and Promotion						
1.1	Develop a 5 year Events Strategy that uses the Lake as a focal point to maximise its appeal and provides a distinct sense of place. This could include: <ul style="list-style-type: none"> Major events focused on the Lake (building on existing events and developing new ones) Smaller cultural and heritage-based events/festivals located around the City, but utilising other natural assets such as the coastal areas and Watagans; and Other large events, such as sporting and music events, utilising existing infrastructure (e.g. Speers Point) 	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Sponsorship Council Event support	Council Chambers Hunter Tourism network Community Promoters DNSW	Establish measures and define impact of Events for the city's visitor economy Increase number of events and improve the profile of the City as a destination.
1.2	Council to investigate the feasibility of developing a Tourism Ambassador Program or Tourism Volunteer Program to support the delivery of Tourism Information for	Consolidate existing visitor segments and broaden the visitor market	2018/2019	Council Operations	Council	Recruit and engage at least 50 Tourism Ambassadors within the first 18 months of the program

	residents and visitors	base				
1.3	Consolidate and extend the Lake Macquarie visitor destination brand (Love the Lake)	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2021	Grants Council Operations Partnerships	LMT DNSW	Increase visitation by 15% in 2022 Destination campaign development targeting key markets.
1.4	Utilise digital media to promote the Lake Macquarie visitor destination brand (Love the Lake)	Develop innovative techniques to increase Lake Macquarie's exposure	2018 - 2021	Council Operations	LMT Council	Quarterly online campaign and website development
1.5	Review and update the visitor website (visitlakemac.com.au)	Develop innovative techniques to increase Lake Macquarie's exposure	2018/2019	Council Operations	LMT Council	Increase traffic to website by 10%
1.6	Explore the feasibility of partnership opportunities with regional tourism teams (Newcastle, Central Coast), including, but not limited to: joint cultural and sporting events; and packaging tourism options	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2021	Grants Council Operations Partnerships	Regional Tourism/ events Council LMT TCC Industry	Develop regional tourism partnerships with events and tourism product packages
1.7	Consolidate a unified governance framework that promotes tourism investment, product development and growth in visitation	Consolidate existing visitor segments and broaden the visitor market base	2018/2019	Council Operations	TCC Industry Council Dantia	Develop a professional tourism and visitor economy focused advisory group by 2020.
1.8	Establish a clear and layered marketing strategy to further consolidate and attract the key markets of Family, VFR, Short Breaks, Nature Tourism, Over 55s and Caravan and Camping	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2020	Council Operations	LMT Council	Increase visitation by 15% by 2022.
1.9	Increase marketing spend to improve reach and profile of Lake Macquarie (potentially funded from other sources)	Consolidate existing visitor segments and broaden the visitor market base	2019 - 2022	Grants Council Operations Partnerships	LMT Council State Gov	Increase visitation by 15% by 2022.
1.10	Continue to improve official visitor publications for an improved visitor experience	Develop innovative techniques to	2022	Grants Council Operations	LMT Council	Increase visitation by 15% by 2022.

		increase Lake Macquarie's exposure		Partnerships		
1.11	Position Lake Macquarie as a nationally recognised sporting hub	Consolidate existing visitor segments and broaden the visitor market base	2022	Grants Council Operations Partnerships	LMT Council Industry Sporting clubs	Improve the number of sporting visitors to the city by 15% at 2020.
1.12	Council to continue to improve Visitor Information Services and aim for increasing resourcing linked with major campaigns and partnerships and additionally, investigate 'pop-up' visitor information booths at key locations around the City	Consolidate existing visitor segments and broaden the visitor market base	2022	Grants Council Operations Partnerships	Council	Increase usage of the VIC by 15% in 2020. Initiate at least 3 per year "pop-up" booths
2. Tourism Product-based initiatives						
2.1	Research and develop a long-term Lake Mac Tourism Product Development plan for the city that identifies gaps and opportunities for the expansion of a tourism industry.	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Council Operations Partnerships	Council Industry Dantia	Strategy linked with other key City and regional plans for the promotion of Tourism Product Development
2.2	On-Water Task force and Action Plan for additional specific product development within water-based activities and coastal infrastructure as a priority to enable the re-ignition of a ferry service, tours on the Lake, over-Lake dining options and more water-based activities.	Deliver unique visitor experiences to enable growth in tourism	2018/2019	Grants Council Operations Partnerships	Council State Gov Dantia Industry Private operator	By 2020, there are at least 5 on-lake Tourism activities on Lake Macquarie.
2.3	Work with the Aboriginal community and stakeholders to develop product to increase market awareness of Aboriginal culture	Deliver unique visitor experiences to enable growth in tourism	2018 - 2021	Grants Council Operations Partnerships	Council Aboriginal Community	Enable at least 2 Aboriginal cultural tourism activities by 2020.
2.4	Encourage a major tourism operator to establish in the area	Consolidate existing visitor segments and broaden the visitor market base	2020 - 2022	Grants Council Operations Partnerships	Council Industry TCC Dantia Private operator	Enable at least one major Tourism operator to establish by 2021
2.5	Determine the feasibility of activating commercial tourism options around the Lake, particularly how to overcome rules and regulations governing the Lake	Deliver unique visitor experiences to enable growth in tourism	2022	Grants Council Operations Partnerships	Council State Gov Dantia Industry Private operator	Enable at least one major Tourism operator to establish by 2021

2.6	Improve the flexibility of land use to proactively encourage more tourism development	Deliver unique visitor experiences to enable growth in tourism	2023	Council operations	Council State Gov	Enable at least one major Tourism operator to establish by 2021
Infrastructure-based requirements						
3.1	Investigate the enhancement of existing passive and adventure experiences (walking, kayaking, 4WD, BMX and bridle) by introducing facilities such as pop-up cafes and other supporting commercial facilities.	Consolidate existing visitor segments and broaden the visitor market base	2020 - 2022 and beyond	Grants Council Operations Partnerships	Council Private operator Industry	Promote a package of Adventure Tourism related products by 2020
3.2	Explore feasibility of providing supporting visitor infrastructure/services within Watagan National Park in collaboration with NPSW and within Belmont Wetlands State Park in collaboration with BWSPT	Deliver unique visitor experiences to enable growth in tourism	2020 - 2022	Grants Council Operations Partnerships	Council State Gov Chambers	Promote a package of Adventure Tourism related products by 2020
3.3	Invest in street beautification public art and signage	Deliver unique visitor experiences to enable growth in tourism	2020 - 2022 and beyond	Grants Council Operations Partnerships	Council State Gov Private philanthropy/coll ectors	Commission at least 4 urban and public art commissions per year
3.4	Continue to encourage and enable interest to attract larger, branded accommodation facilities	Consolidate existing visitor segments and broaden the visitor market base	2022 - 2030	Grants Council Operations Partnerships	Council Dantia State Gov Private operator	Enable at least one major Tourism operator to establish by 2021
3.5	Continue to encourage open access for watercraft through the Swansea Channel	Consolidate existing visitor segments and broaden the visitor market base	2018 - 2022	Grants Council Operations Partnerships	Council Dantia State Gov Private operator	Provide a sustained minimum draft of 1.5m
3.6	Continue to improve access to jetties and moorings for local and visitor use and to improve access to the Lake	Deliver unique visitor experiences to enable growth in tourism	2022 - 2030	Grants Council Operations Partnerships	Council State Gov	Implement \$4million in jetty and pier infrastructure from 2018 - 2020 Increase the availability of 60 tonne or more moorings within the lake by 2020.

3.7	Explore feasibility of providing commercial waterfront facilities, such as retail, dining (e.g. fine dining, wine bars) and hire facilities	Deliver unique visitor experiences to enable growth in tourism	2022 - 2030	Grants Council Operations Partnerships	Council State Gov Private operator	At least 4 on-Lake/beach restaurants/cafes by 2021
3.8	Explore feasibility of identifying and creating a dedicated tourism hub that offers accommodation, event venues, visitor attractions and experiences and a town centre	Consolidate existing visitor segments and broaden the visitor market base	2022 - 2030	Grants Council Operations Partnerships	Council Private operator Chambers	Increase visitation by 15% by 2022
3.9	Investigate a quality cultural infrastructure facility that meets community and economic aspirations	Deliver unique visitor experiences to enable growth in tourism	2019 - 2021	Grants Council Operations Partnerships	Council State Gov	Increase visitation by 15% by 2022
3.10	Develop a feasibility study for a large entertainment conference facility	Deliver unique visitor experiences to enable growth in tourism	2019 - 2021	Grants Council Operations Partnerships	Council State Gov	Increase visitation by 15% by 2022

The following lists define the priorities and acronyms for responsible stakeholders:

Strategies

Refer to Key Strategies on Page 43.

Timeframe:

Short-term: 2018 - 2019

Medium-term: 2019 - 2021

Long-term: 2021 - 2025 and beyond

Acronyms for responsible stakeholders:

LMT – Lake Macquarie Tourism

Council – Lake Macquarie City Council

TCC – Tourism Consultative Committee

Industry – Includes LMBVE and local tourism operators

Dantia – the economic development company for Lake Macquarie

DNSW – Destination NSW

Private operator – privately owned tourism business

Chambers – Includes Lake Macquarie Business and other Lake Macquarie Chambers of Commerce (e.g. Toronto)

Please note all information in the Action Plan is indicative only and may be subject to further research analysis to determine its feasibility.



LAKE MACQUARIE CITY
DESTINATION MANAGEMENT PLAN
2018–2022
FULL PLAN

Prepared by Lake Macquarie Tourism

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