The Central Coast Local Visitor Strategy

The Coast to Canyon Experience

June 2006

Executive Summary

Tourism can make a positive contribution to a community at a number of levels. Put more simply visitors can add to the prosperity of a local area by;

- New dollars being injected into and circulating around the local economy;
- Creating scope for new and expanded businesses;
- Creating new direct and indirect jobs within a community;
- Decreasing dependency on, and in some cases adding value to traditional sectors such as agriculture;
- Contributing to new and expanded infrastructure, services and facilities used by residents;
- Highlighting the need for proper management of environmental and cultural heritage;
- Relocating to live after visiting the area to acquire a better lifestyle;
- Stimulating new and improved transport services within the area or region;
- Improving specialized local training and education opportunities; and
- Providing the opportunity for residents to interact with other people and cultures.

Tourism is one of the world's largest industries and it continues to grow. It is a $50 billion Australian industry. It contributes in excess of $1.5 billion to the State's economy. Regional tourism accounts for around 7 percent of rural and regional employment. For the year to December 2005 there were in excess of 820,000 of which 601,200 were holiday visitors or visiting friends or relatives. It is estimated that visitors could generate in excess of $23 million to the local economy each year and contribute 140 direct and indirect jobs.

Whilst there are obvious benefits of further developing the local tourism sector there are also other impacts and so *the decision to grow or limit tourism development needs to be made at the local level and based on clear information about the costs and benefits of tourism growth.*

The Council plays an important role in the development of Central Coast as a prosperous community. Visitors to the local area can contribute to the economic, social and cultural prosperity of the community. The Council directly provides the majority of the local public infrastructure and many community services that are used by and benefit visitors (and locals alike), as well as indirectly supporting tourism development through its membership of the Cradle Coast Authority.

The Council has taken a lead role in the development of the tourism sector within the municipal area and the region by its large, ongoing investment in tourism infrastructure, particularly the construction of the new Ulverstone Visitor Information Centre, contribution to the development of the Great Nature Trail Touring Route, upgrading the Leven Canyon and the proposed upgrade of the Ulverstone Wharf Precinct.

The Leven River Precinct Study (2004) study concluded that whilst Central Coast has the potential to become the hub of the *North West Touring Region*, it also highlighted:

- The need for improved linkages between the coastal population centres and the hinterland;
- That much of the existing tourism infrastructure (including accommodation) was underdeveloped or degraded;
- The need for improved quality and depth of tourism product and packaging; and
- The need for a tourism culture.

The Council has in part responded to these challenges, as well as addressing the lack of policy and strategic direction, by commissioning the development of a local visitor strategy. The scope of this project is defined as:

- To enhance the diversity and quality of local visitor experiences to encourage increased visitor numbers and provide them with an unforgettable visitor experience; and
- This will be achieved by developing a realistic short-term action plan and longer term staged development and management strategy to develop the tourism sector within the Central Coast municipal area.

The Central Coast Local Visitor Strategy is based on the policy direction set by the Council. It includes:

- Recognition that visitors to the local area contribute to the economic, social and cultural prosperity of the local and regional community;
- The local area in visitor terms cannot be defined by local government boundaries;
- Local government plays an important role in setting the local investment climate;
- The Council already supports directly and indirectly tourism development within the local area and the region;
- The Council recognises the importance of working with State and Regional Tourism Authorities in the development of tourism within the region and the local area;
- The decision to grow or limit tourism development needs to be made at the local level and based on clear information about the costs and benefits of visitor contribution to the community;
- The Council will perform a leadership role in delivering local tourism outcomes to improve the Central Coast as a visitor destination. The Council will actively support local industry sectors that can generate sustainable, measurable tourism outcomes; and
- The Council is not responsible for the development of a local tourism sector.

Key State / Regional issues include:

- Visitor numbers to the region are declining despite a slight increase in visitors to the State. This decline is despite the development and implementation of the State's Touring Route Strategy and a Regional Marketing Strategy;
- Despite the majority of visitors to the State being touring visitors, visitor behavior is moving towards shorter, more localized breaks. Low cost

airlines have had a significant influence on this trend. Visitors are becoming more sophisticated in their choice of destinations and have higher expectations;

- The Cradle Coast is not a recognized short break destination. Devonport and Burnie Airports have been unable to attract competitive low cost services into the area. Some standard air services to the area are being cut. The current Council policy is that the region can only sustain one airport;
- The demise of Spirit of Tasmania III is expected to impact on the number of touring visitors to the area, although the State Government has indicated that it will increase its promotion of the Melbourne services to minimize the impact of the loss of the Sydney Service;
- There is more competition for visitor dollars, with domestic tourism expenditure declining in favor of technology, home renovations and other forms of entertainment;
- Branded Touring Routes direct visitors to major tourism attractions or identified tourism hubs, such as Cradle Mountain, Strahan and Stanley. Whilst they are useful in promoting local attractions along the route and attracting some financial support for upgrading of related infrastructure, local research tends to indicate that the strategy is not directly influencing visitor behavior;
- Tourism Tasmania's 'Tourism Development Framework' is linked to the Touring Routes and is based on existing patterns of behavior and movement around the State. Capitalizing on the recent enormous interest in Tasmania as a visitor destination, the framework has attracted significant investment around the tourism icons. However, it appears to have had little impact on changing visitor behavior and opening up new destination opportunities;
- The Mersey / Leven area has not been identified as an existing or potential tourism destination or hub, despite its ideal central location, it being a gateway to the region and containing a wide variety of visitor attractions, and services;
- The focus on a 'whole of region destination' appears to be based on the similarities within the region, as opposed to developing significant points of difference. This approach appears to reinforce existing visitor behavior. It would seem possible to support and build on the strength of a vibrant regional and cohesive destination, whilst also leveraging off the significant points of difference between the West Coast, Circular Head, King Island and the Central North. A tiered approach to development and marketing would allow the sub region and local destinations to contribute substance to the regional destination;
- The regional and local tourism sectors do not appear to function like many other industry sectors. Despite the fact that tourism is primarily a commercial industry, the Cradle Coast Authority is recognized as the 'Regional Tourism Authority'. This means that the majority of the regional leadership and industry development is the responsibility of the public sector, rather than the industry itself. There is a risk that the tourism industry will become and remain substantially dependent on the public sector;
- The Cradle Coast Authority has been successful in attracting funds to develop a regional tourism experience strategy in order to enhance

tourism products and attractions and improve the overall visitor experience; and

- The Cradle Coast Authority has recently moved to address the lack of identity and market presence by developing a regional brand. The approach is designed to be consistent with the Tasmania's brand.

Key Local Issues:

- Central Coast is not currently a driver of who visits the State or Region;
- Destinations are becoming more skilled and proactive in attracting visitors, making it a very competitive industry. Despite some evidence of improvement, Central Coast performs quite poorly when compared against key successful, quality destination criteria, such as:
    - Having distinctly local identity;
    - Competitive in marketing and promotion;
    - Meeting and exceeding customer expectations;
    - Providing quality experiences visitors want to re-experience;
    - Enjoying sufficient market share and visitor yield;
    - Offer product range for high yield niche markets;
    - Actively compete against other destinations;
    - Offer interpretive visitor experiences;
    - Have a customer service focused culture; and
    - Encourage new, quality infrastructure investment;
- It is estimated that about a third of existing visitors to the region, particularly those travelling along the Bass Highway do not stop in Central Coast;
- Visitor behaviour is changing from the traditional touring holiday visitor towards short breaks and visiting friends and relatives (VFR). Central Coast is well placed to attract touring visitors. However, short break visitors tend to capitalise on discount airfares and stay close to major air entry points, or venture out to the iconic attractions only;
- Despite its geographical location and abundance of natural attractions, the area lacks the range, depth and quality of market ready visitor product, services and infrastructure to be of interest as a stand-alone destination. The same could be said for Devonport, Kentish and Latrobe Council areas. However, collectively the Central North has the potential to become a significant visitor destination;
- Local market research indicates that almost one third of the visitors interviewed come from Tasmania;
- Existing local public visitor related infrastructure is underdeveloped or degraded. Until recently there has been very little significant investment in local public infrastructure. Local research identifies natural and built public space is a major part of the area's core appeal;

  Recent Council investment in constructing the new Ulverstone Visitor Information Centre and with the support of the Cradle Coast Authority and the Federal Government, improving the Great Nature Trail signage and roadside infrastructure and improvements to the Leven Canyon and hinterland scenic drive (both currently under way) has gone some way to addressing this issue. Upgrading of infrastructure needs to be targeted and demonstrate broad community, rather than tourism specific benefits;

- Other than the major upgrade of the Penguin Markets and the Beachway Motel, there has been little investment in visitor related, private infrastructure. A climate of strong private investment in such infrastructure is vital to a sustainable and prosperous local tourism sector;

- The depth and variety of local visitor related products and services is quite limited and skewed strongly towards accommodation (particularly Bed and Breakfast / Cabins). Such services tend to support the tourism sector, as opposed to being a driver of visitation. The majority of the attractions are based on scenery and the natural environment. Few attractions engage visitors and offer quality visitor experiences. There is little in the way of interpretive experiences;

- The Cradle Coast Authority, within the context of the Cradle Coast Regional Experience Strategy is providing support to develop local visitor experiences. However, the experience strategies in themselves will not add long-term value unless there are products and attractions of substance and quality to build on;

- Central Coast is not recognised as a major visitor destination. Local market research indicates that more needs to be done to promote the area as a visitor destination. However, such promotion needs to reflect the area's current level of development. Local market research has provided significant market intelligence to inform a targeted future marketing and communications strategy. Such a strategy needs to be a shared responsibility between the Council and the local tourism sector;

  There is merit in continuing to support the work of the Cradle Coast Authority in promoting the region, whilst collaborating with neighbouring Council's to add substance by actively developing and promoting the local area as a destination;

- Central Coast is a small community and economy and so it must manage and target its resources strategically. The Council is under pressure to increase the range and level of services across its core and discretionary activities. Investment in any aspect of tourism development other than basic service provision, such as visitor information services and public infrastructure investment should be based on substantial, demonstrable community benefit and within the community's capacity;

  Local government is currently under scrutiny in regarding its long-term sustainability. The cost of delivering services is testing Councils' capacity to generate required revenue. Improved efficiency and effectiveness of delivering Council services can often be achieved by aggregation - neighbouring Councils working together to deliver combined services across a greater local area; and

  Whilst visitors add value to a local economy, they also impact on the local community. Any visitor related development must be consistent with local community values.

Local market research has identified that Central Coast visitors are:

- More likely couples, driving around in own car, stay in above average commercial accommodation;

- Very active (well above average) and visit many places around Tasmania – 51% visit Cradle Mountain, highlighting its importance;
- More likely to use Travel Agents; Travel literature – Brochures & Books etc;
- More likely to be first time visitors and stay between 7 and 21 nights;
- Older in age, with income levels in the lower to middle segments;
- Visiting "as part of a planned itinerary"; and
- In the main not in the area to visit a specific attraction or experience.

A summary of the key local visitor survey findings includes:

- Visitors to the Central Coast are generally happy with what they find;
- The area receives about 1/3 of its visitors from Tasmania – these visits are "purpose driven" they come for a specific reason;
- The area under performs out of Victoria the closest and biggest market;
- Additional accommodation services are required particularly after hours;
- They stay longer than average in Tasmania, have probably been before and are well informed / researched;
- The level of awareness of key attractions / places of interest is high;
- The majority of the visitors are satisfied and would not change anything about the Central Coast; and
- Mentions requiring attention included signage, parking, accommodation and opening hours of food outlets / shops in retail precincts.

Local tourism related businesses are relatively upbeat about their viability into the short to medium term, but there is little evidence of proposed major investment and on increasing employment opportunities. They:

- Feel that promotion to create an awareness of the region and local area is important;
- Think that Council and business could do better;
- Are concerned about seasonality fluctuations;
- Feel the council does not integrate well with other councils or Cradle Coast on tourism issues & opportunities;
- See real opportunities for improved infrastructure eg Leven Canyon;
- Completely support the trails and touring route opportunity;
- Believe the region needs more reasons for people to visit; and
- Are critical of the Council's 'no debt' policy;

The Council is mindful of ensuring that the development of Central Coast as a visitor destination benefits locals and visitors alike. Community consultation continually demonstrates that locals support tourism development, but not at any expense. They have strong views regarding Central Coast as a destination.

They like:

- Easy road network for touring;
- Nature based activities – Particularly attractions and tracks;

- The river(s);
- Coastal scenic drives;
- Beaches / parks;
- Temperate climate;
- Peaceful, relaxing, rejuvenating environment;
- Free parking;
- Natural charm and beauty;
- Friendly, caring locals; and
- It is Safe.

They don't like:

- Poor quality of directional and way finding signage;
- Lack of food outlets open after normal business hours;
- Parking congestion (particularly in Penguin);
- Lack Public transport;
- Lack of identity as a destination;
- Lack of interpretation of natural environment;
- Lack of variety and standard of accommodation;
- Rubbish around rivers / hinterland;
- Standard of public toilets;
- Undesirable behavior / Lack of police presence; and
- Lack of activities for young people.

The Central Coast Local Visitor Strategy is divided into 3 key strategy areas:

1. Destination Development:
    - Assumes destination is as much about being the place to live and invest as being a place to visit;
    - Improving public infrastructure (includes information and directional signage such as the Coast to Canyon Scenic Drive, Leven Canyon and riverside parks etc);
    - Building community support;
    - Improving cultural and lifestyle opportunities;
    - Creating a positive investment environment;
    - Developing a precinct approach to capitalize on local diversity:
        - Ulverstone;
        - Penguin;
        - Gunns Plains Caves to Leven Canyon area; and
        - Dial Range.

2. Enterprise Development:
    - Facilitating opportunities for businesses within our core business sectors can add value to their enterprise through tourism outcomes, particularly:
        - Agriculture;
        - Retail and services; and
        - Hospitality.
    - Building community and industry capacity;
    - Playing a coordinating / facilitating role in regional and state support into local business sectors;
    - Facilitating development of experience and interpretation strategies; and
    - Facilitating generation of market ready product and services.
3. Communication and Marketing:
    - Market Research and analysis;
    - Visitor Information Services;
    - The Coast to Canyon Brand application and management; and
    - Marketing and Promotion.

Major elements of the Strategy include:

- The *Coast to Canyon* Brand:
    - A vehicle through which locals, businesses, visitors, investors can relate to the area's distinct and appealing characteristics; and
    - It will provide a concentrated, competitive edge in the way Central Coast attracts investment and visitors; and in the way it continues to build on its community strengths, social values and municipal capacity;
    - Requires a commitment to improve the range, depth, and quality of visitor, community, investment and lifestyle experiences to ensure we can deliver on our brand promise.

  Central Coast's coastline and natural attractions such as the Leven Canyon are consistently identified as the area's most dominant features. The brand builds on these attributes as well as expansive open spaces and agricultural enterprise and produce. It reflects our core values such as a sense of community and warmth; a place of natural beauty and a sense of freedom.
- The Coast to Canyon Scenic Drive:
    - Central Coast's road network effectively links visitor precincts – the towns and hinterland and their major attractions and experiences. The road network effectively showcases the hinterland's natural and rural beauty, which is part of the area's local appeal. The *Coast to Canyon Scenic Drive* aims to provide a *driving for pleasure* visitor experience in its own right and has the potential to encourage visitors to exit the major touring routes, slow them down and keep them in the area longer; and

- The Coast to Canyon Experiences:
  - Angler's Access:
    - Builds on the Tasmanian fishery as is significant resource for recreation, community, lifestyle, economic and tourism terms;
    - Angler's Access provides a market ready product to promote in key niche markets;
    - The development of angling experiences close to existing product and population centres will support local and regional tourism development;
    - Local benefits will include: increased visitation and local participation; private enterprise investment; increased club memberships and community capacity building; and improved local recreational resource; and
    - Stage 2 to include offshore fishing destination strategy.
  - Food, Produce and Agriculture:
    - The Cradle Coast Authority has developed a strategy for the region to establish a food and beverage sector to compete with other regions;
    - Specific strategies include:
      - Building a network of operators from 'produce to plate';
      - Developing food and wine experiences;
      - Promoting the experiences;
      - Increasing brand awareness of local produce; and
    - The opportunity exists to leverage off this strategy to develop numerous related agricultural experiences.
  - Tracks and Trails
    - Integrating with Recreation and Open Space network;
    - Requiring partnership with other land owners;
    - A short term focus assets that would qualify for short walk development that would qualify for inclusion in the Tasmania's short walks package, such as:
      - Leven Canyon;
      - Ferdene;
      - Mt Gnoman; and
      - Mt. Montgomery.
    - Including longer term strategies to develop other nature based attractions and experiences;
    - Including strategic shared use paths such as Leven River Foreshore network and Ulverstone to Turners Beach cycle way;
    - Exploring the feasibility of the area becoming a cycling destination; and

- General Experience development:
  - Providing the scope to work with industry and community sectors to develop specific experiences over time, such as:
    - Retail; and
    - Heritage and Cultural.

There is very little discretionary capacity within the Council and the local tourism related industry sectors and so it is important that the strategy is implemented in a staged, manageable and sustainable way.

There is more to be done than there are funds and people to deliver. Given Central Coast's early stage of development as a visitor destination, the short term focus is on creating an awareness of Central Coast as a destination and improving visitor numbers and yield based on the area's existing attractions, products and services. The strategy also creates the scope to identify longer term opportunities in infrastructure and product development and encouraging private investment.

Table 1. Central Coast Local Visitor Strategy – Strategy Overview

Strategy	Actions
Destination Development	
Staged approach to improving local public infrastructure	Continue with the implementation of the Leven River Precinct Study – Forward Works Program Develop master plans for public areas of significance within Council control – Master Plans to include a staged works program. Significant areas include: o Leven Canyon o Fairway / Bicentennial Park o Penguin Railway / Hiscutt Park Continue to progress Ulverstone Wharf Master Plan Implement Coast to Canyon Scenic Drive Makeover. Includes: o Bass Highway Gateway signs o Unmanned visitor information centres (3 locations) o Improved directional signage o Staged upgrade of major attraction and reserve signage o Brochure / marketing collateral o Improved scenic viewing areas o Improved linkages with neighboring Councils Develop a local Tracks and Trails Master Plan that includes prioritized, staged upgrade of tracks and trails in natural and built settings. High priorities include: o Ferndene o Mt. Montgomery o Mt Gnoman o Leven Canyon Public attraction future upgrades: o Preston Falls (Lower) o Leven Canyon Floor Track o Castra Falls o Winterbrook Falls Conduct an economic and community cost benefit analysis of long term future of the Ulverstone Water Slide – consideration should be given to attracting private investment in adjoining, complementary commercial recreation activity such as mini golf
Improve depth and variety of local cultural experiences	Develop a local cultural strategy Support a staged expansion of Penguin History Group's work. An appropriate sized dedicated display area could be considered as part of a Penguin Tourism Precinct Develop an interpretive Heritage Experience (trail) that links Penguin, Ulverstone and the Hinterland

Strategy	Actions
Create a strategic alliance with Devonport, Kentish and Latrobe Councils to develop a sub-regional visitor destination	Initiate discussion with neighboring Councils around tourism issues of mutual interest
Improve strategic road linkages with Cradle Country Touring Route	In conjunction with Kentish Council improve Spellmans Road to visitor road standard Investigate feasibility of linking South Nietta with Mt Gairdener to improve hinterland relationship with Cradle Mountain Lobby for change in Cradle Country Touring Route to be rerouted through Central Coast Hinterland
Improve recreational / visitor opportunities in recreation open space network	Investigate feasibility of Central Coast becoming a major cycling destination, including potential development of a major mountain bike facility within the Dial Range Improve recreational access to Leven and Forth Rivers at designated points – improve signage to and basic amenity at key locations Develop business case for construction of Ulverstone – Turners Beach Cycle way (including improved recreational amenity at Forth River foreshore)
Improve Visitor Infrastructure for Penguin	Create a Penguin Visitor and Cultural Precinct to integrate the Penguin Railway Station and Hiscutt Park – Stage 1 includes development of a precinct master plan
Improve holiday visitor air access to the region	Lobby for an independent cost benefit analysis of regional airport needs
Build leadership capacity within local tourism related industry	Dissolve current Strategic Plan Tourism Action Group in favor of establishing a cross industry reference group that can focus on tourism outcome. The reference group should operate under the guidance of Council's Economic Development Committee Recognize the Central Coast Chamber of Commerce and Industry as the peak local tourism industry group
Enterprise Development	
Create an environment conducive to investment	Review Council's Economic Development Strategy Review role and makeup of Council's Strategic Planning Action Groups
Facilitate opportunities for businesses within local core industry sectors that can add value to their enterprise through tourism outcomes	Under auspice of the local economic development plan (with support of proposed tourism outcomes reference group), convene a series of industry sector forums to identify and prioritize specific local projects (an action plan) that will deliver significant tourism outcomes. Key industry sectors include: o Agriculture o Retail and services o Hospitality

Strategy	Actions
Develop capacity of local industry sectors to deliver tourism outcomes	In conjunction with the Department of Economic Development and Industry Peak Bodies, convene industry sector forums to determine training and support needs and opportunities In conjunction with local business, consider developing a pilot program to trial extended operating hours during next visitor season – consider a rostering approach
Increase capacity to deliver improved visitor experiences	Develop and implement specific themed experience strategies in conjunction with local industry sectors. Focus on strategies that have links to Tasmanian, Cradle Coast and Coast to Canyon Experience Strategies, such as: Short term o Food and Produce / Agricultural Interpretation o Tracks and Trails (Including nature based experiences and cycling) o River / Angling Access o Recreational retail Longer term o Waterfalls and Nature based – adding value to Tracks and Trails o Culture and Arts o Heritage o Angling Access Stage 2 – Develop Central Coast as an off shore fishing destination o Encourage development of and participate in Coastal Railway journeys (sub regional experience) Investigate feasibility of development of an organic growers market / educational centre and visitor attraction Develop an interpretive approach to experiences
Improve capacity to attract major events, festivals and conferences	In conjunction with neighboring Councils develop a coordinated approach to attraction of major events to the local area Create a central database that includes the local attractions, accommodation and services etc
Communication and Marketing	
Develop capacity for generating local visitor market research and analysis	Lobby Tourism Tasmania for local inclusion in TVS Market research Participate in Tourism Tasmania's local market research collection pilot program Develop a cooperative approach with Devonport, Latrobe and Kentish Councils to regularly collect and analyze visitor market research
Leverage off Touring Route Strategies	Continue with current commitment to Great Nature Trail Approach Cradle Country Councils with a view to inclusion in joint promotion of Cradle Country Touring Route

Strategy	**Actions**
	Lobby to have the Cradle Country Touring Route realigned to come via Central Coast
Improved Visitor Information Services	Continue to develop Visitor Centre Business Plan for inclusion in TVIN Redevelop Council Tourism Web page to a Coast to Canyon Web Site Investigate feasibility of relocating Penguin Visitor Centre and Central Coast Service Centre to the proposed Penguin visitor precinct.
Develop the Coast to Canyon Brand application and management	Develop brand application materials and collateral, including image library and style guide and templates etc In conjunction with Chamber of Commerce develop a set of Brand Management guidelines
Introduce a program of seasonal festivals / events	Develop a Festivals Strategy based around 'Coast to Canyon Core Appeals and Experiences ▪ Multi day event around Ulverstone Show – leverage off an add value to the agricultural sector (eg food and produce) ▪ Capitalize on seasons and low times of year and where possible piggy back on related events and festivals in the broader local area ▪ Develop individual and multi precinct events and festivals ▪ Review Council event financial support to focus on events / festivals that deliver substantial destination outcomes
Improve visitor awareness of local destination	Develop a targeted combined destination *(Cradle Country)* promotion strategy in conjunction with neighboring Councils and Cradle Coast Authority Includes continuation of support for Cradle Regional Guide, development of Coast to Canyon Web Site, and a contribution to developing an expanded Cradle Country Touring Route booklet Encourage private investment in destination promotion Develop commercially viable merchandise for sale from visitor centres and commercial outlets Continuing role out of the Coast to Canyon Signage Program

Key Recommendations

It is recommended that the Council:

- Adopts the proposed *local visitor* policy and strategy framework that is integrated into its broader corporate policy and planning, to ensure a consistent whole of Council approach to the development of Central Coast as a visitor destination;
- Develops master plans for public areas of significance within Council control – Master Plans to include a staged works program. Significant areas include:
  - Leven Canyon; and
  - Fairway / Bicentennial Park.
- Develops a local Tracks and Trails Master Plan that includes prioritized, staged upgrade of tracks and trails in natural and built settings. High priorities include:
  - Ferndene;
  - Mt. Montgomery;
  - Mt Gnoman; and
  - Leven Canyon.
- Develops a local cultural strategy;
- Initiates discussions with Devonport, Kentish and Latrobe Councils around tourism issues of mutual interest with a view to creating a strategic alliance to develop a sub-regional visitor destination *(Cradle Country)*;
- Approaches Cradle Country Councils with a view to inclusion in joint promotion of the Cradle Country Touring Route;
- Requests a change in Cradle Country Touring Route to be rerouted through Central Coast Hinterland;
- Requests the Cradle Coast Authority and State Government to investigate feasibility of developing a major Mountain Bike facility within the Dial Range;
- Develops business case for construction of the Ulverstone – Turners Beach Cycle-way, including improved recreational amenity at Forth River foreshore;
- Develops a master plan for a Penguin Visitor and Cultural Precinct that integrates the Penguin Railway Station and Hiscutt Park;
- Lobbies for an independent cost benefit analysis of regional airport needs;
- Updates the Central Coast Economic Development Plan;
- Investigates the feasibility of development of an organic growers market / educational centre and visitor attraction in the Central Coast hinterland;
- Establishes a 'tourism outcomes' industry reference group in lieu of the Central Coast Strategic Plan – Tourism Action Group. The newly formed reference group to operate under the guidance of the Council's Economic Development Committee;
- Lobbies Tourism Tasmania for local inclusion in TVS Market research; and
- Conducts a major review of the strategy within three years, with an annual report to the community on the implementation of strategy and tourism impact.

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Chapter 1
Introduction

The Central Coast municipality is strategically located at the centre of Tasmania's North coast. It was formed in 1993 as a result of an amalgamation of the Ulverstone and Penguin Municipal Areas.

There are approximately 21,000 residents (approximately 4% of state population). Of the 29 municipalities, it is the 7th largest in population. It has the largest town (Ulverstone) in Tasmania and is the second most populated municipal area in the Cradle Coast Region. The local economy is largely rural, with a mix of agriculture, manufacturing, community services and wholesale and retail trade.

There is a strong retail base, which serves the towns, rural hinterland and other speciality needs, a solid education-employment sector, but a low proportion in cultural and recreational services, which is an important part of a broad service sector. Unemployment rates are typical of disadvantaged regional Australia, which is higher than the National and State average. Youth and long term unemployment is of a particular concern for the area.

The area is characterised by seaside towns and satellite residential suburbs, with safe beaches and extensive parklands. The picturesque rural hinterland is interspersed with an abundance of quality, accessible natural resources. A high quality lifestyle makes Central Coast an attractive place to visit and a place to live.

Why support the local tourism sector?

Tourism can make a positive contribution to a community at a number of levels. ("Why Should Local Government invest in Tourism?" - Tourism Council of Australia – Tasmania, approx 1995):

- Multiplier effect – new tourist dollars injected into a local economy. A percentage of the dollar is spent in the community by the recipient and re-spent creating a multiplier effect – this assumes the more resources are generated by the local community, the greater the multiplier effect;
- Employment opportunities – Tourism is a labor intensive sector. It can create additional direct and indirect jobs within for a community;
- Diversification – can make the local economy less directly dependent on traditional sectors – or in some cases add value to traditional sectors such as agriculture;
- Improved facilities for residents – can contribute to new and expanded infrastructure, services and facilities used by residents. It can improve the financial viability of services and facilities;
- Opportunities for business – creates scope for new and expanded businesses that might not be viable based on resident population;
- Preservation of environment and heritage – highlights the need for proper management through effective policies and planning;
- Catalyst for residential development – visitors can travel to places and relocate to acquire a better lifestyle;
- Improved transport services – can stimulate new and improved transport services within area or region;

- Educational opportunities – can improve opportunities for residents through introduction of specialized training; and
- Broader social outlook – Provides the opportunity for residents to interact with other people and cultures.

Why have a Local Visitor Strategy?

Tourism is one of the world's largest industries and it continues to grow. The Australian Government's White Paper (2003) states that 'Tourism is growing in importance as an economic driver both globally and in Australia.' Domestic tourism directly contributes over $50 billion to the Australian economy. Tourism employs directly or indirectly in excess of 950,000 Australians. Regional tourism accounts for around 7 percent of rural and regional employment.

Expenditure by international, interstate and intrastate visitors in 2003 was estimated to contribute in excess of $1.5 billion to Tasmania's economy. In the same period there were almost 37,000 Tasmanians directly or indirectly employed in tourism and related industries. (National Visitor Survey, 2003)

In 1999 / 2000 there were around 572,000 visitors to Tasmania. For the year to December 2005 there were in excess of 820,000 of which 601,200 were holiday visitors or visiting friends or relatives. (Tasmanian Visitor Survey December 2005)

It is estimated that visitors could generate in excess of $23 million to the local economy each year and contribute 140 direct and indirect jobs (Syneca – Central Coast Tourism Impact Model).

Whilst there are obvious benefits of further developing the local tourism sector the Australian Government's White Paper (p42) points out: *The decision to grow or limit tourism development needs to be made at the local level and based on clear information about the costs and benefits of tourism growth.*

Why a role for Local Government

The Council plays an important role in the development of Central Coast as a prosperous community. Visitors to the local area can contribute to the economic, social and cultural prosperity of the community. The Council directly provides the majority of the local public infrastructure and many community services that are used by and benefit visitors (and locals alike), as well as indirectly supporting tourism development through its membership of the Cradle Coast Authority.

According to the Australian Government's White Paper (2003), "Local governments play an important role in *setting the local investment climate* through provision of infrastructure and public attractions, development and regulatory decisions and support for local and regional tourism promotion."

There is an expectation at various levels of the tourism sector that the Council should take a lead role in local tourism development, particularly given the demise of the various tourism industry groups. The Council has responded to this need by commissioning the development of a local visitor strategy.

Why develop Central Coast as a visitor destination?

Central Coast boasts beautiful free flowing rivers, safe, sandy beaches, extensive parklands and a rugged coastline. Its picturesque rural hinterland is interspersed with an abundance quality, accessible natural resources. The climate is mild and rainfall is good. The area is one of the most productive agricultural areas in Tasmania. Central Coast is a place of community warmth, natural beauty and freedom. There are many tourism and recreation opportunities. Its proximity to Stanley in the northwest, the Tamar River to the east and Cradle Mountain to the south provides an ideal base for exploring the region.

The Central Coast Strategic Plan (2004 – 2009) demonstrated its appreciation of the area's tourism potential by identifying *Tourism Development* as one of its seven future directions, and specifically to encourage quality visitor experiences through appropriate tourism sector development. Central Coast Council's Economic Development Strategy (2004 – 2009) also identified *Tourism Development* as one of its four key result areas.

The Council has a large, ongoing investment in tourism related infrastructure, particularly with the construction of the new Ulverstone Visitor Information Centre and contribution to the development of the Great Nature Trail Touring Route, upgrading the Leven Canyon and the proposed redevelopment of the Ulverstone Wharf Precinct.

The Leven River Precinct Study (2004) study concluded that whilst Central Coast has the potential to become the hub of the *North West Touring Region*, it also highlighted:

- The need for improved linkages between the coastal population centres and the hinterland;
- That much of the existing tourism infrastructure (including accommodation) was underdeveloped or degraded;
- The need for improved quality and depth of tourism product and packaging; and
- The need for a tourism culture.

This analysis accurately reflects a destination at an early stage of development.

The Central Coast Local Visitor Strategy

The Council has in part responded to these concerns as well as addressing the lack of policy and strategic direction, by commissioning the development of a local visitor strategy. The scope of this project is defined as:

- To enhance the diversity and quality of local visitor experiences to encourage increased visitor numbers and provide them with an unforgettable visitor experience.
- This will be achieved by developing a realistic short-term action plan and longer term staged development and management strategy to develop the tourism sector within the Central Coast municipal area.

A policy and planning framework has been developed to provide guidance for the Central Coast Local Visitor Strategy and to ensure that it is integrated into other Council and regional strategies.

This strategy was developed and managed in-house with the support of a project reference group. Consultants were commissioned to conduct the specific tasks such as market research and the development of a local destination brand concept.

A number of industry and Councillor workshops and focus groups were conducted at various stages of the project. They included tourism precinct workshops in Ulverstone, Penguin and the hinterland, branding workshops and a business industry focus group. Visitor, community and tourism related business surveys were also conducted.

Successful destinations tend to evolve through a series of stages – the destination lifecycle. Destinations need time to mature. This strategy has been designed to guide Central Coast through the early stages of its destination development. Subsequent strategies can build on this foundation. This means:

- Expectations of the destination must be realistic as it progresses through its lifecycle;
- There must be a patient, yet persistent staged implementation of the strategies consistent with the destination's stage of its lifecycle;
- There is very little discretionary capacity within the Council or the local tourism sector. The focus will be on maximizing opportunities that currently exist and doing fewer things very well, rather than many things done not so well; and
- The aim is for Central Coast to become the best destination it can be, at each stage of the evolving lifecycle.

Chapter 2
Vision, Mission and Outcomes

Vision

The Vision - *Tasmania's Central Coast – An unforgettable visitor experience*

The Mission

The Mission - *To maximize the economic, social and cultural benefits from the staged, sustainable development of Central Coast as a visitor destination*

Outcomes

Key Strategy Outcomes include:

- A local community that is proud of Central Coast as a place to live and visit;
- Increased recognition of Central Coast as a visitor destination;
- Increased visitor satisfaction with Central Coast as a destination;
- Increased visitation and visitor yield;
- Increased visitor related local business enterprise;
- Increased private and public investment in visitor related products, services and infrastructure; and
- Increased local visitor related jobs.

Our measures of success will include:

- Level of local community pride regarding the municipal area;
- Visitor level of Brand recognition of the local destination;
- Visitor satisfaction with the destination;
- Change in visitor numbers;
- Change in visitor yield;
- Level of private and public investment in tourism infrastructure and ventures; and
- Changes in visitor related employment levels.

Chapter 3
Guiding Planning Principles and Policy Statements

Guiding Principles

Economic Context – A Balanced Approach – The focus is on economic outcomes, not specific industry sector development.

Tourism is one of a number of sectors valued for their contribution to the economic, social and cultural prosperity of the area. The Council should provide the basic local public infrastructure, assets and services sufficient to encourage appropriate development and to deliver appropriate tourism outcomes.

Investment in other than basic local provision of visitor related infrastructure, assets and services, should be based on a sound business case and substantial, demonstrated community benefit.

Benefits / Values Approach - Preference should be given to supporting infrastructure assets, programs and services that best demonstrate community values and deliver demonstrated beneficial outcomes to the widest cross-section of the community.

Shared Responsibility – Whilst the Council plays a major role in the provision of public infrastructure, assets and community services, the community also has a responsibility, to where appropriate, pursue a cooperative approach in the development, management, and provision of related opportunities.

The Council should agree to work cooperatively with various community and industry sectors in order to deliver appropriate tourism outcomes.

Realistic, Achievable and Sustainable – The Council's provision of visitor related public infrastructure, assets and services should be delivered to meet an appropriate level of community and visitor need and be within the capabilities of the Council and the community to sustainably manage and maintain.

Integrated Local Area Planning – The Council accepts that visitors do not recognize local government boundaries in determining destinations. The Council should liaise with neighboring Councils and other key stakeholders in the development and management of visitor related infrastructure, assets and services where appropriate. Provision must be delivered within the Council and community means.

A Safe Environment – The Council should work together with the community to ensure that visitor related opportunities are provided in an environment that is consistent with contemporary standards and practices for health, risk management and public safety.

Quality - Service Delivery Approach – The Council should ensure that visitor related opportunities provided are based on demand and meet acceptable levels of community satisfaction and enjoyment. Council should strive to improve the quality and variety of visitor related opportunities and the efficiency and effectiveness with which related public facilities and services are provided.

Environmentally Sustainable Development - Environmental impacts should be carefully considered and managed with respect to protecting and conserving the built and natural environment.

Community Capacity and Social Capital – The Council recognizes and values the contribution of local operators and community groups in providing visitor related experiences. The Council should continue to support initiatives that are based on a sound business case and substantial, demonstrated capacity to contribute to the strength of the community and generate social capital.

Optimizing Land use – The Council should use a value / benefits based approach to determine optimal use of strategic public land.

A Sense of Place – The Council should plan and shape the local built environment to stimulate an increase in economic, cultural, social and leisure activity. It should ensure that the built environment will contribute to Central Coast being a better place to live and to visit.

Transparency and Inclusiveness – The Council should involve the community where practical in decision-making. It will generate transparent, accountable processes regarding its role in the development of Central Coast as a visitor destination.

Policy Statements

Visitors to the local area contribute to the economic, social and cultural prosperity of the local and regional community.

Tourism development is primarily about sustainable commercial activity.

The local area in visitor terms cannot be defined by local government boundaries.

Local government plays an important role in setting the local investment climate through provision of infrastructure and public attractions, development and regulatory decisions and support for local and regional tourism promotion.

The Council directly provides the majority of the local public infrastructure and many community services that are used by and benefit visitors, as well as indirectly supporting tourism development through its membership of the Cradle Coast Authority.

The Council recognises the importance of the State and Regional Tourism Authorities in the development of tourism within the region and the local area.

The decision to grow or limit tourism development needs to be made at the local level and based on clear information about the costs and benefits of visitor contribution to the community.

The Council will perform a leadership role in delivering local tourism outcomes to improve the Central Coast as a visitor destination. The Council will actively support local industry sectors that can generate sustainable, measurable tourism outcomes.

The Council is not responsible for the development of a local tourism sector.

Chapter 4
Situational Analysis

Tourism development per se is not core business of the Council. There are already questions being raised regarding the long-term sustainability of local government. If the Council is to take a significant role in generating visitor outcomes, it will require a whole of Council approach and must be manageable in terms of Council's capacity, resources and timelines.

This Strategy reflects the way the Council can operate effectively and best facilitate the delivery of tourism outcomes. It is:

- Effectively an *Asset and Service Delivery Plan* focusing on tourism development outcomes;
- Practical, achievable and will deliver measurable, affordable outcomes;
- A dynamic action oriented process with shorter planning horizons, with improved monitoring capacity and more review points;
- Not currently a high-risk investment strategy due to:
    - The early stage the destination is its development life cycle; and
    - The volatile short term tourism trends and the changes uncertainty created over the scrapping of Spirit III and reduced air access into the region. This will be monitored periodically and the investment strategy may change;
- Integrated with other internal strategies such as economic development, recreation and open space, community, culture and asset management;
- A balanced approach to building the best possible, sustainable future for Central Coast as a place to live, visit and invest - help Central Coast to become a destination of substance;
- Linked to State and Regional tourism development and interfaces with Strategies including:
    - State Level:
        - Tourism 21 – Customer, Experience, Branding, Marketing, Community, Product;
        - Food and Produce;
        - Tracks and Trails; and
        - Wildlife / Nature based.
    - At the Regional level:
        - Touring Routes;
        - Experience Strategy - Coast to Canyon Experience, Tracks and Trails, Source to Sensation (Food and Wine); and
- It argues that the best contribution that Central Coast can make to tourism in the region is for it to become the best destination it can be given where it is at each stage of its destination lifecycle.

Key current issues include:

- Visitor numbers to the region are declining despite a slight increase in visitors to the State. This decline is despite the development and implementation of the State's Touring Route Strategy and a Regional Marketing Strategy;
- Despite the majority of visitors to the State being touring visitors, visitor behavior is moving towards shorter, more localized breaks. Low cost airlines have had a significant influence on this trend. Visitors are becoming more sophisticated in their choice of destinations and have higher expectations;
- The Cradle Coast is not a recognized short break destination. Devonport and Burnie Airports have been unable to attract competitive low cost services into the area. Some standard air services to the area are being cut;
- The demise of Spirit of Tasmania III is expected to impact on the number of touring visitors to the area, although the State Government has indicated that it will increase its promotion of the Melbourne services to minimize the impact of the loss of the Sydney Service;
- The region does not have one central major visitor air entry point and to date there has been little success in raising the short break and VFR awareness of the two regional airports and / or attracting discount flights from the carriers. There does not appear to be a regional airport strategy built on a sound economic and community benefit basis;
- There is more competition for visitor dollars, with domestic tourism expenditure declining in favor of technology, home renovations and other forms of entertainment;
- The next few years are going to be tough for the tourism sector;
- The Central Coast area aligns strongly with the State brand. The area adds value to Tasmania as a visitor destination. Central Coast has the opportunity to leverage off the work being done by Tourism Tasmania in promoting the State's Brand;
- State and Regional 'Tourism Route Strategies' have recognized the importance of attracting visitors to the regions. This has been accomplished by the development and promotion of branded touring routes and directing tourism investment to major tourism attractions or identified tourism hubs, such as Stanley.

  Whilst branded touring routes are useful in promoting local attractions along the route and attracting some financial support for upgrading of related infrastructure, local research tends to indicate that the strategy is not directly influencing visitor behavior and there is little recognition of the touring route brands. Regional market research on the touring routes confirmed that there was little recognition of two of the three regional touring routes;
- Tourism Tasmania's 'Tourism Development Framework' is linked to the Touring Routes and is based on existing patterns of behavior and movement around the State. Capitalizing on the recent enormous interest in Tasmania as a visitor destination, the framework has attracted significant investment around the tourism icons. However, it appears to have had little impact on changing visitor behavior and opening up new destination opportunities;

- Interestingly, the Mersey / Leven area has not been identified as an existing or potential tourism destination or hub, despite its ideal central location, it being a gateway to the region and containing a wide variety of visitor attractions, and services;
- The focus on a 'whole of region destination' appears to be based on the similarities within the region, as opposed to developing significant points of difference. This approach appears to reinforce existing visitor behavior and contributes little to opening up new destination opportunities;
- The regional tourism sector does not appear to function like other industry sectors. Despite the fact that tourism is primarily a commercial industry, the Cradle Coast Authority is recognized as the 'Regional Tourism Authority'. This means that the majority of the regional leadership and industry development is the responsibility of the public sector rather than the industry itself;
- The Cradle Coast Authority's role as the regional economic development arm of the Region, including its contribution to the development of tourism is not in question. The Authority has demonstrated its value in being able to attract and manage considerable grant funds, across a variety of community and industry sectors within the region. However, the tourism industry seems to be prepared to allow the public sector take the lead role and drive the majority of tourism development in the region (there are some obvious localized exceptions where there is considerable private investment- particularly around the icons and hubs);
- It does not appear to be a priority to develop regional industry leadership and build capacity to develop a long-term sustainable tourism industry. This means that as the Authority increases its role and contribution, local Councils (as significant stakeholders of the Cradle Coast Authority), are being asked to substantially ramp up their contribution to the development of regional tourism, making this contribution an increasing component of Council business activity. This is a big shift in emphasis for local Councils. There is a risk that the tourism industry will become substantially dependent on the public sector;
- The Cradle Coast Authority has been successful in attracting funds to develop a regional tourism experience strategy in order to enhance tourism products and attractions and improve the overall visitor experience; and
- The Cradle Coast Authority has recently moved to address the lack of identify and market presence by developing a regional brand. The approach is designed to be consistent with the Tasmania's brand.

Key Local Issues:

- Central Coast is not a driver of who visits the State or Region. It is a high priority to at least influence the behavior of those who do visit the region to include Central Coast in their itinerary;
- Tourists are more sophisticated in destination selection. Visitors expect better quality experiences and services. Destinations are becoming more skilled and proactive in attracting visitors, making it a very competitive industry;
- As Central Coast is an emerging destination, it tends to perform quite poorly when compared against key successful, quality destination criteria, such as:
    - Having distinctly local identity;

  - Competitive in marketing and promotion;
  - Meeting and exceeding customer expectations;
  - Providing quality experiences visitors want to re-experience;
  - Enjoying sufficient market share and visitor yield;
  - Offer product range for high yield niche markets;
  - Actively compete against other destinations;
  - Offer interpretive visitor experiences;
  - Have a customer service focused culture; and
  - Encourage new, quality infrastructure investment.

- The region is losing significant market share, decreasing the pool of available visitors that can be attracted to Central Coast. However, it is estimated that about a third of existing visitors to the region, particularly those travelling along the Bass Highway do not stop in Central Coast, providing a significant opportunity for the local tourism sector;

- Visitor behaviour is changing from the traditional touring holiday visitor towards short breaks and visiting friends and relatives (VFR). Central Coast is well placed to attract touring visitors. However, short break visitors tend to capitalise on discount airfares and stay close to major air entry points, or venture out to the iconic attractions only. Capturing a share of this market will in part be determined by whether the region can attract sufficient discount airfares to at least one of the air entry points;

- Central Coast is not recognised at the State or Regional level as a current or potential tourism development priority. Despite its geographical location and abundance of natural attractions, the area lacks the range, depth and quality of market ready visitor product, services and infrastructure to be of interest as a stand-alone destination. The same can be said for Devonport, Kentish and Latrobe Council areas. However, an analysis of the combined range, depth and quality of market ready visitor product, services and infrastructure shows that collectively the central north has the potential to become a significant visitor destination. Devonport, Kentish and Latrobe have recognised that visitors do not recognise local government boundaries and currently collaborate on a number of visitor related projects and services;

- Very little is known regarding intrastate visitor trends and the opportunities they offer. Local market research indicated that almost one third of the visitors sampled come from Tasmania;

- Central Coast is not included in the TVS Data collection. There are indications that the Council area could be included in future surveys, however it is likely to be confined to Ulverstone, not the entire area. Council is encouraged to pursue the matter further with Tourism Tasmania;

- Existing public visitor related infrastructure is underdeveloped or degraded. Until recently there has been very little significant investment in the local infrastructure. Local research natural and built public space is a major part of the area’s core appeal;

  Council has gone some way to addressing this issue with recent investment in the new Ulverstone Visitor Information Centre, and with the support of the Cradle Coast Authority and the Federal Government, improving the Great Nature Trail signage and roadside infrastructure and the Leven Canyon and hinterland scenic drive (both currently under way);

- Other than the major upgrade of the Penguin Markets there has been little investment in visitor related, private infrastructure. A climate of strong private investment in such infrastructure is vital to a sustainable and prosperous local tourism sector. Anecdotal local information indicates that local operators in the main are not planning any major infrastructure investment in the foreseeable future;

- The depth and variety of local visitor related products and services is quite limited and skewed strongly towards accommodation (particularly Bed and Breakfast / Cabins). Such services tend to support the tourism sector, as opposed to being a driver of visitation. The majority of the attractions are based on scenery and the natural environment. Few attractions engage visitors and offer quality visitor experiences. There is little in the way of interpretive experiences;

- The Cradle Coast Authority, within the context of the Cradle Coast Regional Experience Strategy is providing support to develop local visitor experiences. However, the experience strategies in themselves will not add long-term value unless there are products and attractions of substance and quality to build on;

- Central Coast is not recognised as a major visitor destination. Local market research indicates that more needs to be done to promote the area as a visitor destination. However, such promotion needs to reflect the area's current level of development. Local market research has provided significant market intelligence to inform a targeted future marketing and communications strategy. Such a strategy needs to be a shared responsibility between the Council and the local tourism sector;

  There is merit in continuing to support the work of the Cradle Coast Authority in promoting the region as well as collaborating with neighbouring Council's to actively promote the local area as a destination in its own right;

- Central Coast is a small community and economy and so it must manage and target its resources strategically. The Council is under pressure to increase its range and service levels across its core and discretionary activities. Investment in any aspect of tourism development other than basic service provision such as visitor information services and public infrastructure investment must be based on substantial, demonstrable community benefit and within the community's capacity;

  Local government is currently under scrutiny in terms of its long-term sustainability. The cost of delivering services is testing Council's capacity to generate required revenue. Council's operational and recurrent expenditure far exceeds the revenue it generates from rates and fees and charges. On the expenditure side, improved efficiency and effectiveness of delivering Council services can often be achieved by aggregation - neighbouring Councils working together to deliver combined services across a greater area; and

- Whilst visitors add value to a local economy, they also impact on the local community. Any visitor related development must be consistent with local community values.

The Local Visitor Products, Attractions and Services Inventory

The local visitor products, attractions and services inventory highlights a lack of market ready products, services and opportunities. The core inventory consists of:

- Accommodation
  - Motor Inns / motels 2
  - Hotels 3
  - Bed and Breakfast / Self contained cottages 24
  - Caravan Parks / camping sites / cabins 7
  - Camp and conference 1

- Attractions
  - Antiques / Antiquarian Books 3
  - Wineries 4
  - Galleries 4
  - History Museum / Displays 2
  - Caves 1
  - Agricultural Interpretation / Gardens 3
  - Wild life / reptile parks 2
  - Scenic and Nature based guided tours 4
  - Markets (includes car boot sales) 5
  - Water Slide 1
  - Significant Natural / Scenic Attractions 12
  - Misc. 3

- Eating Out
  - Restaurants / Bistro 18
  - Bakeries / Cafes 29

Note: Excludes Central Coast's extensive river and ocean foreshore open space network – recognised as a core appeal for the area

Chapter 5
Market Research Analysis

Very little is known about local visitor behavior. Visitor information is not routinely collected locally, making it very difficult to make informed decisions. Local market research has been conducted to inform the local visitor strategy development. The data collected was not intended to be comprehensive, but to identify the triggers of local visitor behavior. It has been collected in a fashion that can be repeated periodically to monitor visitor local visitor trends over time.

Additional information regarding the local tourism sector is required. Information was sort regarding such issues as: percentage of business generated from tourism; visitor numbers; current employment and investment and future intentions etc. The response to a visitor survey was poor, despite a follow up. It is assumed local businesses are reluctant to provide what they may perceive as sensitive information. The information is vital to future planning and efforts should continue to obtain it.

Tourism Tasmania is in the process of developing a local visitor information data collection pilot program and Central Coast is encouraged to become part of this pilot. It may streamline data collection and may overcome any concerns that local businesses may have in contributing important business sensitive information.

Given the emphasis on ensuring that future related development benefits locals and visitors alike, a community survey and local focus groups were conducted in Ulverstone and Penguin.

Challis Strategic was commissioned to conduct local visitor market research. The research also included an analysis of Tasmania Visitor Survey (TVS) Data.

Tasmania Visitor Survey (TVS) Data

Tourism Tasmania samples visitors to the State on a quarterly basis. Tasmanian visitor trends (TVS 12 MONTHS TO MARCH 2006)

- 805,100 visitors as passengers on scheduled air and sea transport (up 5%)
- Overnight visitors up 5%
- Total nights down 7%
- Average length of stay now 8.2 nights (was 9.3)
- Air visitors up 7% to 662,000 visitors; while sea visitors down 4% to 143,400 visitors
- Ratio of 82% air visitors to 18% sea visitors
- Holiday visitors up 2% to 387,100
- Visiting friends and relatives up 10% to 217,000
- Business visitors up 7% to 137,000
- Conference/convention down 8% to 19,400
- Domestic visitors up 7% to 700,200
- International visitors down 4% to 105,100
- Total spend up 4% to $1.146 billion)
- Average visitor spend per night now $173 (was $155)
- Average visitor spend per trip now $1,424 (was $1,439)
- Holiday visitor nights down 3%
- Holiday average length of stay now 8.8 (was 9.3 nights)
- Average holiday visitor spend per night now $231 (was $212)
- Average holiday visitor spend per trip now $2,038 (was $1,972)

- Holiday touring visitors down 2% to 296,900 visitors (staying 4+ nights)
- Holiday short break visitation up 18% to 86,800 visitors (staying 1-3 nights)
- Visitors departing Tasmania by AIR stayed an average 7.0 nights in 2006 (was 7.8 nights in 2005). If they were on HOLIDAY, they stayed 7.0 nights (was 7.5 nights).
- Visitors departing Tasmania by SEA stayed an average of 13.7 nights in 2005 (was 15.4 nights in 2005). If they were on HOLIDAY, they stayed 13.7 nights (was 14.3 nights in 2005)

Changes in visitor behavior by most important destinations (TVS to March 06) includes:

- Touring Visitors increases (4 days plus)
    - Victoria No change
    - New South Wales 5%
    - Queensland 7%

- Short Break Visitor increases (1-3 days)
    - Victoria 5%
    - New South Wales 79%
    - Queensland 108%

TVS Regional Trends (12 months to March 2006)

The Cradle Coast Region experienced a 5.5% decline in holiday visitor overnight stays (compared to Cradle Mountain -8.9%). The trends varied substantially across the region with Smithton enjoying a 55.8% increase on last year, compared to Burnie's 38% decrease for the same period. In general, destinations including Wynyard and further west enjoyed substantial growth, whilst destinations east of Wynyard suffered a substantial decline.

The average length of stay for the region is 3.1 days, down from 3.2 days last year.

Wynyard has been identified as providing an indication of Central Coast visitor patterns. Wynyard enjoyed 82,000 visits of which 11,800 (or 14.4%) were overnight, for an average of .3 nights per visitor. The visitor nights increased by 11% compared to the same time next year.

Despite the similarities between Central Coast, caution should be used in reading too much into these results from a local perspective, due mainly to the apparent disparity between the east and west of the region. For instance, Devonport, Burnie and Sheffield suffered a drop 23.5%, 38.2 and 31.7% respectively in over night visitation.

The impacts of the losses were mitigated to some extent, particularly in the east of the region, when all visitors were factored in, with an overall decline of visitor nights by 4.4%.

TVS Local Implications

Central Coast is not included in the TVS Data collection. There are indications that the Council area could be included in future surveys, however it is likely to be confined to Ulverstone, not the entire area. Council is encouraged to pursue the matter further with Tourism Tasmania.

Wynyard is the best available, nearest town where statistics are collected and so it has been used as a comparison for Ulverstone and Penguin. This is an analysis of visitor characteristics to the Central Coast area (based on Wynyard collection point)

A Central Coast visitor scenario could be as follows:

- 599,900 people visited Tasmania for Holiday and VFR purposes in the 12 months to Sept. 05;
    - Of these 224,000 visited Devonport;
    - 153,000 go to Burnie;
    - 246,000 visited or passed through the Central Coast (at least one of Wynyard, Burnie or Devonport - *Unless they went via the Cradle Country Touring Route*) which represents 41% of all visitors to the state; and
    - % of visitors staying in towns where data is captured is relatively low. Wynyard likely provides the best clue to behaviour in Ulverstone or Penguin. Conversion of visitors through each town is low. Research indicates that 34% of visitors pass through without stopping (34 %).
- Visitors to the Central Coast are likely to be older in age and have income across a range from low to high with majority in the lower to middle segments. The life stage map identifies concentrations of visitors in varying life stage segments (The first % is the Tasmanian average the second relates to Central Coast).

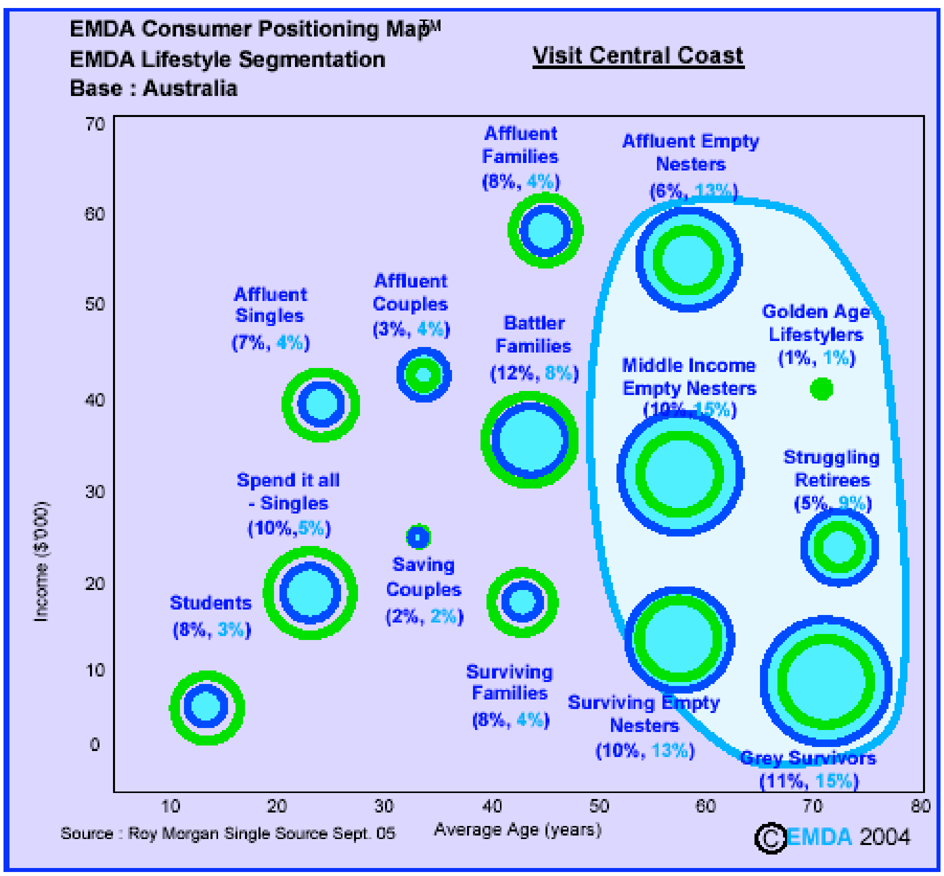

Figure 2: EMDA Lifestyle Segments for Central Coast compared to the State

TVS EMDA - Lifestyle Segment Characteristics

Affluent Empty Nesters (6%)

- Very well off, kids are gone or not financially dependent;
- Take frequent holidays, local, interstate and overseas;
- Heavy users of Travel agents, brochures, travel guides and the internet as information sources;
- Big on nature, the finer things in life and history; and
- Heavy newspaper readers and selected magazines.

Middle Income Empty Nesters (10%)

- Also quite big travelers, now the kids are off their hands;
- Use a variety of information sources, travel agents, the internet, brochures and travel guides;
- Above average interest in nature, wineries, eating out; and
- Above average users of newspapers and commercial TV is also making an appearance.

Surviving Empty Nesters (10%)

- Lack of money is a major constraint;
- Cheap holidays are the order of the day;
- Generally below average in most holiday activities;
- Above average on package tours – especially coaches; and
- Heavy users of TV, light on newspapers and the Internet.

Golden Age Lifestylers (1%)

- A time for reaping the rewards of a lifetime of hard work;
- Overseas cruises are a favorite amongst a group that wants to spend the inheritance before the kids get it;
- Very experienced travelers, accumulated over a lifetime; and
- Very heavy readers of newspapers.

Struggling Retirees (5%)

- More like the Golden Age Lifestylers without as much money;
- Generally above average on the finer things in life, Theatre, Art Galleries, also interested in nature, wineries the outdoors;
- Above average on packages and use a variety of information sources such as Motoring Clubs and advertising; and
- Heavy users of commercial TV and newspapers.

Grey survivors (12%)

- Due to lack of money, and for some health concerns they are less interested in taking holidays;

- This segment has very low incomes and their holidays are characterized by a low average spend per night, but total spend, because they are such a big segment, is high; and
- They watch a lot of commercial TV, listen to the radio, hardly use the internet at all and are below average magazine readers because of the expense.

Central Coast Local Visitor Survey

Mark Challis from Challis Strategic conducted a local visitor survey to provide visitor input into the strategy. The purpose of this survey was to identify and analyse visitor behaviour relating to the Central Coast, to determine the key triggers to visit and identify the activities and services that attract visitors. Respondents were also asked about any areas that could be improved. The study was developed to allow a benchmarking process to commence, allowing future studies to track trends and relevant changes from a visitor perspective.

A total of 201 surveys were conducted during the month of April 2006. Interviews were face-to-face intercept style and were undertaken by two professional interviewers local to the region. The survey had only one filtering question requiring the respondent to be a visitor to the Central Coast – if necessary a description of towns in the Central Coast was provided.

The intercept interviews were conducted at four locations – Ulverstone, Penguin, Leven Canyon and Gunns Plains – the surveys were conducted on both workdays and weekends and a mix of male and female respondents and age groups was sought. The full survey report is included as Appendix 1 (Section 3 of the Strategy).

Central Coast visitors are:

- More likely couples, driving around in own car, staying in above average commercial accommodation;
- Very active (well above average) and visit many places around Tasmania – 51% visit Cradle Mountain, highlighting its importance;
- More likely to use Travel Agents; Travel literature – Brochures & Books etc;
- More likely to be first time visitors and stay between 7 and 21 nights;
- Visiting "as part of a planned itinerary";
- In the main not in the area to visit a specific attraction or experience; and
- Visiting due to coastal location and beaches; food or provision.

A summary of the key survey findings follows:

- Visitors to the Central Coast are generally happy with what they find;
- The Central Coast receives about 1/3 of its visitors from Tasmania – these visits are "purpose driven" they come for a specific reason – usually to visit friends and relatives or to attend an event or market;
- The area under performs out of Victoria the closest and biggest Market to Tasmania providing some excellent growth opportunities;
- Visitors indicated that some additional accommodation and services were required particularly after hours;

- A large % of visitors are Older, lower socio economic segments – they stay longer than average in Tasmania, have probably been before and are well informed / researched – other higher yielding segments will only be attracted with the development of 4 + star accommodation and unique experiences linked to Tasmania's key appeals – Local produce including wine as a trigger to visit has merit;
- Findings indicate a focus by council on being "the best they can be" in public spaces and amenities management, cleanliness and appealing streetscapes are the priorities;
- To satisfy current and potential visitors needs and expectations council must focus on economic development strategies and frameworks which encourage private investment in built infrastructure;
- From a Marketing perspective:
    - Many visitors said more promotion was needed;
    - Combining with and integrating into broader regional and touring strategies makes real sense; and
    - Formation of a destination approach based on synergistic clusters of natural and made attractions, accommodation and services – realistic travel times and accessibility – the view must look well beyond municipal boundaries.

The level of awareness of key attractions / places of interest is high. The majority of the visitors are satisfied and would not change anything about the Central Coast. Mentions requiring attention included signage, parking, accommodation and opening hours of food outlets / shops in retail precincts.

Local Industry Perspective

The local tourism industry is relatively small, with almost all visitor related businesses being micro businesses (directly employing 5 people or less). Very few businesses derive their entire income from tourism. In many instances, tourism is not the primary source of income.

Local tourism related businesses are relatively upbeat about their viability into the short term, but there is little evidence of proposed major investment and on increasing employment opportunities. They:

- Feel that promotion to create an awareness of the region and local area is important;
- Think that Council and business could do better;
- Are concerned about seasonality fluctuations;
- Feel the council does not integrate well with other councils or Cradle Coast on tourism issues & opportunities;
- See real opportunities for improved infrastructure eg Leven Canyon;
- Completely support the trails and touring route opportunity;
- Believe the region needs more reasons for people to visit
- Believe marketing / advertising is required;
- Are critical of the Council's 'no debt' policy;

- Believe there is a great opportunity to focus on local produce and agriculture; and
- Don't think locals understand the value of tourists.

The Council is mindful of ensuring that the development of Central Coast as a visitor destination benefits locals and visitors alike. Community consultation continually demonstrates that locals support tourism development, but not at any expense. They have strong views regarding Central Coast as a destination.

They like:

- Easy road network for touring;
- Nature based activities – Particularly attractions and tracks;
- The river(s);
- Coastal scenic drives;
- Beaches / parks;
- Temperate climate;
- Peaceful, relaxing, rejuvenating environment;
- Free parking;
- Natural charm and beauty;
- Friendly, caring locals; and
- It is Safe.

They don't like:

- Poor quality of directional and way finding signage;
- Lack of food outlets open after normal business hours;
- Parking congestion (particularly in Penguin);
- Lack Public transport;
- Lack of identity as a destination;
- Lack of interpretation of natural environment;
- Lack of variety and standard of accommodation;
- Rubbish around rivers / hinterland;
- Standard of public toilets;
- Undesirable behavior / Lack of police presence; and
- Lack of activities for young people.

The greatest opportunities include:

- Nature based (eg improve Ferndene and selected walks (Mt Gnoman) and attractions) – develop activities to better utilize attractions;
- Develop Dial as Mountain Bike Mecca – specific area;
- Improve river access (fishing and general);
- Foster and support small operators;

- Interpretation – natural and local history;
- Develop a Regional tourism committee;
- Cycle ways;
- Improve directional and way finding signage;
- Promotion of Central Coast as a destination;
- A Penguin Tourism Precinct – better utilization of Penguin Railway Station and associated Hiscutt Park; and
- Upgrade Ulverstone Wharf.

Market Research Overall Analysis (Challis Strategic)

The local research clearly supports the TVS data analysis that visitors to the Central Coast tend to be longer than average stayers, and because they are in Tasmania for extended periods, they are generally well informed and have researched their trip thoroughly. To capture the interstate and international visitors, it will be critical to provide information prior to arrival through the creation of a quality Web presence key links, and once they are in the state, provide information at points of entry (airports/ship) and visitor centres.

The Tasmanian residents interviewed in the survey had travelled to the region for a purpose – this "purpose-led visitation" highlights the importance of attractions, markets and events. The three primary reasons for visitation by Tasmanians to the region are:

- Visiting friends and relatives;
- Events or festivals, either public or private eg weddings; and
- And The Penguin Market.

Based on the research findings - following elements are recommended:

1. Central Coast Council in conjunction with neighbouring councils identify destination elements considered important to visitors (based on the research and key triggers) and create plans to enhance, maintain and develop these;
2. Seek to develop a formal relationship between bordering councils to harness the destination development potential of the combined regions' attractions and experiences;
3. Work as a destination group with Cradle Coast and the two touring routes (Great Nature Trail and Cradle Country) to promote the destination and its appeals.

Government	Private Enterprise
Enabler	Investor
Facilitator	Supporter
Public space and experiences development and maintenance	Attractions, accommodation and services development

Key Elements that should be delivered by Government:

- Encourage and support through economic development strategies, business development and improvement;
- Maintenance and development of public spaces and amenities;

- Cleanliness and appeal of town entrances and streetscapes;
- Formation of a destination development team of councils – brand and promotions development in conjunction with private enterprise; and
- Event and festival development and facilitation.

Key Elements that should be delivered by Private Enterprise:

- Development of a quality range of accommodation in all star ratings and categories;
- Business opening hours and access based on visitor needs;
- Further development and improvement of built and interpreted attractions; and
- Marketing support from private enterprise, both individually and in a cooperative destination.

Economic Outlook Commentary (Mark Challis - June 2006)

The next 2 – 3 years will be tough in Tourism; clearly regions including the Cradle Coast which is already under performing against Tasmania state averages will be hit. Local, National and global events are impacting significantly on visitor arrival forecasts and continued discount airfares has Tasmanians leaving the state for breaks in unprecedented numbers.

Key Issues:

1. Australian economy has slowed rapidly in all key economic measures; GDP, Private consumption and Gross national expenditure are all down – Interstate and outbound trips have followed.
2. Cost to holiday in Australia up and exceeds outbound options for Australians
3. Outbound trips up 9% on previous year which was up 30%
4. Interstate nights, trips and length of trip down and falling
5. Holiday trips easing for interstate and no growth last 5 years
6. Touring style holidays winning overseas share – interstate growth in short breaks
7. Leisure visitors to Tasmania up 5% in last year (to DEC 05) VFR up 18% same period – yield per visitor plummeting
8. More short breaks – less touring
9. Tasmanian Intrastate trips plummet – outbound soars

NOTE: Data based on BDA Research report May 2005

For the Central Coast increased short breaks and decreased intrastate opportunities will hit hard – the next 3 years will likely see a continued slowing in economic measures and interest rate rises – a big factor will be global events (positive and negative) including security and oil prices – the value of the $A will also impact. The operating environment for Tourism has changed – there is no wave to ride and all share and results will have to be competitively gained.

Chapter 6

Priority Issues, Implications and Proposed Response

Issue	Implication	Proposed Response
Visitor numbers to the region are declining despite a slight increase in visitors to the State	Implementation of the State's Touring Route Strategy and a Regional Marketing Strategy appears to have had limited impact. There needs to be a destination based approach to regional development.	Continue to participate with the State Government and Cradle Coast Authority to develop the region's attractiveness to visitors. Central Coast does not have a high conversion rate of current visitors to the region. A local destination development approach will improve current and future conversion rates.
Visitor behavior is moving towards shorter, more localized breaks. Low cost airlines have had a significant influence on this trend.	Majority of visitors to the region remain touring visitors. The region / local area are not currently conducive to interstate short break visitors.	Despite the trend, the main focus in the short term should be on improving conversion rates of touring visitors as well as attracting intrastate and intra-regional visitors.
Visitors are becoming more sophisticated in their choice of destinations and have higher expectations.	Competition between destinations will become more intense. Destinations must meet and exceed visitor expectations.	Cooperate with Tourism Tasmania and Cradle Coast Authority in destination development and marketing Develop local destination development plan at the municipal and broader catchment level
Devonport and Burnie Airports have been unable to attract competitive low cost services into the area.	Increasingly difficult to attract interstate short break visitors. The cost of airfares into the region is not something Council can control.	A cooperative approach with neighbouring Councils to the east could attract short break visitors out of Launceston. Perhaps there is a need for an independent cost benefit analysis of the airport needs for the region
The demise of Spirit of Tasmania III is expected to impact on the number of touring visitors to the area	Will impact on Tourism Tasmania's attempts to penetrate Sydney and Southern Queensland markets Will impact on touring visitors entering the State through the region	State Government has indicated that it will increase its promotion of the Melbourne services to minimize the impact of the loss of the Sydney Service
The Central Coast area aligns strongly with the State brand. Central Coast has the opportunity to leverage off the State's Brand.	Central Coast does not have the resources to go it alone and make an impact as a destination – it must leverage off the State's brand	Develop and apply local destination brand that is aligned to State and region's core appeals
Branded touring routes are useful in promoting local attractions along the route and attracting some financial	There is a need for a destination development approach to attract and retain visitors longer	Develop a local destination development plan

Issue	Implication	Proposed Response
support for upgrading of related infrastructure, but tend not to directly influence visitor behavior		
Tourism Tasmania's 'Tourism Development Framework' has attracted significant investment around the tourism icons. However, it appears to have had little impact on changing visitor behavior and opening up new destination opportunities.	There is now substantial awareness, investment and visitor traffic to the major regional icons and development clusters, perhaps there can now be a focus on emerging potential destinations	It may be timely to review the framework to identify and a tiered approach to destination development
Central Coast or the Mersey / Leven area have not been identified as an existing or potential tourism destination or hub, despite its ideal central location, it being a gateway to the region and containing a wide variety of visitor attractions, and services	Individual Council areas lack critical mass to become a major destination in their own right. The lack of a coordinated approach to develop the area is limiting its contribution to the region	There is an opportunity for the Central Coast to engage in dialog with its neighbours to collaborate on tourism related development of mutual benefit. Develop a subregional destination development plan that covers Kentish, Devonport, Central Coast and Latrobe municipal areas
The focus on a 'whole of region destination' appears to reinforce existing visitor behavior and contributes little and open up new destination opportunities.	Focuses investment around the icons and designated hubs – makes it difficult for emerging destinations	It would seem possible to support and build on the strength of a vibrant regional destination, whilst also leveraging off the significant points of difference between the West Coast, Circular Head, King Island and the Central North.
There is no local or regional tourism industry association.	The majority of the regional leadership and industry development is the responsibility of the public sector rather than the industry itself.	Explore the potential for a strategic alliance between the local chambers of industry and commence at the Mersey – Leven level
The Cradle Coast Authority has recently moved to address the lack of identity and market presence by developing a regional brand. The approach is designed to be consistent with the Tasmania's brand.	Regional brand will be a powerful marketing and communications tool for the region.	Support the regional brand – ensure the local brand aligns with the regional brand
Central Coast is not a driver of who visits the State or Region.	It is dependent to a large extent on Tourism Tasmania and Cradle Coast Authority to attract visitors to the region	Continue to support regional approach to tourism development Make it a high priority to at least influence the behavior of those who do visit the region to include Central Coast in their itinerary.
Central Coast performs quite poorly when compared against key	Central Coast cannot compete effectively as a visitor destination	Develop local destination development plan

Issue	Implication	Proposed Response
successful, quality destination criteria		
It is estimated that about a third of existing visitors to the region, particularly those travelling along the Bass Highway do not stop in Central Coast	Provides a significant opportunity for the local tourism sector to increase its market share	Improve visitor awareness of the Coast to Canyon experience through targeted marketing and promotion
Existing public local visitor related infrastructure is underdeveloped or degraded. Until recently there has been very little significant investment in the local infrastructure.	Local research indicates natural and built public space is a major part of the area's core appeal. Current visitors reasonably satisfied by what is provided, but expectations are likely to increase as destinations become more competitive	Develop and implement a destination development plan
The depth and variety of local visitor related products and services is quite limited and skewed strongly towards accommodation (particularly Bed and Breakfast / Cabins).	Such services tend to support the tourism sector, as opposed to being a driver of visitation. The majority of the attractions are based on scenery and the natural environment.	Develop and implement a destination development plan
More needs to be done to promote / create awareness of the local area as a visitor destination.	Local market research has provided significant market intelligence to inform a targeted future marketing and communications strategy. Such a strategy needs to be a shared responsibility between the Council and the local tourism sector.	Continue to support regional marketing and promotional strategies as well as developing a local approach, leveraging off regional and local brands
Central Coast is a small community and economy and so it must manage and target its resources strategically. The Council is under pressure to increase its range and levels of service across its core and discretionary activities.	Investment in any aspect of tourism development other than basic service provision such as visitor information services and public infrastructure investment must be based on substantial, demonstrable community benefit and within the community's capacity.	Consider delivering tourism outcomes as part of a broad approach to economic development. Requests for the provision of other than basic services should be subject to a business case
Local government is currently under scrutiny in terms of its long-term sustainability.	Improved efficiency and effectiveness of delivering Council services can often be achieved by aggregation	Neighbouring Councils should discuss the possibilities of an aggregated approach to the delivery of some visitor related services
Whilst visitors add value to a local economy, they also impact on the local community. Any visitor related development must be consistent with local community values.	Retaining local appeal and charm as a place to live needs to be balanced with its potential as a place to visit and invest	Development of a policy and planning framework based on a balanced set of community values
Central Coast is not included in the TVS Data collection.	Including Ulverstone and Penguin in the TVS would provide a more accurate reflection of visitor behaviour in the region.	Council should pursue the matter further with Tourism Tasmania.
The future of the Dial Range	The Dial Range is an important	Lobby the State Government for a

Issue	Implication	Proposed Response
Recreation Management Plan must be considered in doubt as there appears to be little commitment from the State Government via its land managers to invest in the Dial Range.	natural resource. The majority of the land is controlled by the State Government. Developing the area's potential beyond its current service levels does not appear to be a priority for the State Government	renewed interest in the Recreation Management Plan
Implications of Forestry activity on nature based tourism attractions	Forestry activity has the capacity to impact on the visual amenity of nature based attractions. Forestry is also a prominent part of the regional economy and heritage	Whilst it is generally outside of the scope of this strategy, Forestry, Government at all levels and local interest groups are encouraged to continue to have dialog in order to achieve the best balanced outcomes
Implications of inappropriate land use of river catchments	The health of the river catchments is fundamental to the long term prosperity of the area. Inappropriate land use in the river catchments could jeopardize the long term health of the rivers as well as limit the quality of associated recreational activities.	Whilst it is generally outside of the scope of this strategy, the Council is encouraged to cooperate with the Cradle Coast Authority in developing river catchment management plans. Improving recreation and visitor outcomes should be a consideration in the plans.

Strategies	Actions	Time frame (Years)	Project Partners	Responsibility	Performance Indicators (see below for code)	Financial Implications
Destination Management						
Staged approach to improving local public infrastructure	Continue with the implementation of the Leven River Precinct Study – Forward Works Program	Yrs 1-5 yrs		Assets and Eng.	• Community Pride • Satisfaction • Visitor Numbers	As per approved works program
	Develop master plans for public areas of significance within Council control – Master Plans to include a staged works program. Significant areas include: ○ Leven Canyon ○ Fairway / Bicentennial Park	Yr 2		Assets and Eng Assets and Eng Assets and Eng	• Community Pride • Satisfaction • Visitor Numbers	$20,000 (This investment not only prioritizes opportunities, but will also create business plans necessary to generate grant funding
	Continue to progress Ulverstone Wharf Master Plan	Yrs 1-2	State and Federal Governments	General Manager with support from Assets and Eng	• Community Pride • Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	$50,000 (to Expression of Interest Stage). It is likely that some of this is recoverable (possible financial support from DED) – includes $10,000 for Traffic Study
	Implement Coast to Canyon Scenic Drive Makeover. Includes: ○ Bass Highway Gateway signs ○ Unmanned visitor information centres (3 locations)	Yr 1		Assets and Eng / General Manager	• Visitor Numbers	As per existing approved budget

	○ Improved directional signage ○ Staged upgrade of major attraction and reserve signage ○ Brochure / marketing collateral ○ Improved scenic viewing areas ○ Improved linkages with neighboring Councils					
	Develop a local Tracks and Trails Master Plan that includes prioritized, staged upgrade of tracks and trails in natural and built settings. High priorities include: ○ Ferndene ○ Mt. Montgomery ○ Mt Gnoman ○ Leven Canyon Includes possible education / interp centre at old Penguin refuse site	Yr 2	Parks, Forestry and Cradle Coast Authority	Assets and Eng	• Community Pride • Satisfaction • Visitor Numbers	$10,000 (would expect at least in kind support from Parks, Forestry and Cradle Coast) Master Plan will be a requirement / justification in attracting future grant / external funding
	Public attraction future upgrades: ○ Preston Falls (Lower) ○ Leven Canyon Floor Track ○ Castra Falls ○ Winterbrook Falls	Yrs 1-5	Parks, Sport and Recreation and Forestry and Cradle Coast Authority	Assets and Eng	• Community Pride • Satisfaction • Visitor Numbers	Likely to attract external funding and in kind support from service clubs, operators and government sponsored employment programs As per future business case arising from tracks and trials masterplan (would expect external funds for Winterbrook Falls)
	Conduct an economic and community cost benefit analysis of long term future of	Yr 2	Private investors	Corp and Comm	• Community Pride • Satisfaction	$5,000 Ageing infrastructure and risk

	the Ulverstone Water Slide – consideration should be given to attracting private investment in adjoining, complementary commercial recreation activity such as mini golf				• Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	management will necessitate the need to look at the long term future of this asset, particularly given its strategic location for alternate or related commercial recreation activity
Improve depth and variety of local cultural experiences	Develop a local cultural strategy Support a staged expansion of Penguin History Group's work. An appropriate sized dedicated display area could be considered as part of a Penguin Tourism Precinct Develop an interpretive Heritage Experience (trail) that links Penguin, Ulverstone and the Hinterland	Yr 1 TBC Yr 2	Cradle Coast Authority Cradle Coast Authority	Corp and Comm Corp and Comm Corp and Comm	• Community Pride • Satisfaction • Visitor Numbers • Community Pride • Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise • Satisfaction • Visitor Numbers	$10,000 (Would expect in kind support from Cradle Coast Authority. Strategy would be a prerequisite to attract future funding support As per proposed Penguin Visitor Precinct master plan and associated business case $20,000. Strategy is needed to prioritise opportunities and to attract grant and private investment Likely to attract external funding and in kind support from service clubs, operators and government sponsored

						employment programs
Create a strategic alliance with Devonport, Kentish and Latrobe Councils to develop a sub-regional visitor destination	Initiate discussion with neighboring Councils around tourism issues of mutual interest	Yr 1	Devonport, Latrobe and Kentish Councils, Cradle Coast Authority, Tourism Tasmania and local industry	General Manager	• Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	There may be justifiable additional costs in future years. A combined approach is likely to deliver better outcomes at a lower cost than if Council attempted the same on its own
Improve strategic road linkages with Cradle Country Touring Route	In conjunction with Kentish Council improve Spellmans Road to visitor road standard Investigate feasibility of linking South Nietta with Mt Gardener to improve hinterland relationship with Cradle Mountain Lobby for change in Cradle Country Touring Route to be rerouted through Central Coast Hinterland	Yrs 2-4 Yr 3 Yr 1	Kentish Council, State and Federal Governments Cradle Country Councils, Cradle Coast Authority, Tourism Tasmania	Assets and Eng Assets and Eng General Manager	• Visitor Numbers • Visitor Numbers • Visitor Numbers	Major work will need to be grant funded or as per future business case Major work will need to be grant funded or as per future business case
Improve recreational / visitor opportunities in recreation open space network	Investigate feasibility of Central Coast becoming a major cycling destination, including potential development of a major mountain bike facility within the Dial Range Improve recreational access to Leven and Forth Rivers at designated points – improve signage to and basic amenity at key locations	Yr 2 Yr 1 – 3	Cradle Coast Authority, State Government (Forestry and Sport and Recreation) State and Federal Governments, Cradle Coast Authority, Inland Fisheries, local angling and service	Corp and Comm Assets and Eng	• Visitor Numbers • Visitor Yield • Investment • Community Pride • Satisfaction • Visitor Numbers • Visitor Yield	In kind (expect cost to be borne by State Government). Feasibility will be a prerequisite to attracting external funds River Access Project • $3750 for roadside access signs (from existing Coast to Canyon budget) • Subject to grant

	Develop business case for construction of Ulverstone – Turners Beach Cycle way (including improved recreational amenity at Forth River foreshore)	Yr 1	clubs State and Federal Governments, Cradle Coast Authority, Inland Fisheries, local angling and service clubs	Corp and Comm and Assets and Eng	• Community Pride • Satisfaction	funding pilot project will provide $35,000 Likely to attract external funding and in kind support from service clubs, operators and government sponsored employment programs $20,000 business case (this investment will be required to generate business case in order to attract the $800k or so to construct)
Improve Visitor Infrastructure for Penguin	Create a Penguin Visitor and Cultural Precinct to integrate the Penguin Railway Station and Hiscutt Park – Stage 1 development of a precinct master plan that could include: • Relocated visitor centre and Council Service Centre– gift shop • Expanded History display • Education and Interpretation Centre • Art space / gallery • Café • Long term parking • Bookings / pick up point for short tours / activities • District passive park and associated amenities	Yr 2	State and Federal Governments, Private investment, local community and industry	Corp and Comm	• Community Pride • Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	$20,000 for feasibility study. Study and associated master plan will be a prerequisite to attracting grant funds and private investment for construction Relocation of existing visitor / service center would allow for the sale of the existing site to contribute funds to any future redevelopment
Attract low cost air carrier to the region	Lobby Cradle Coast Authority for an independent cost benefit analysis of long term regional airport needs	Yr 1	Airport Authorities and Cradle Coast Authority	General Manager	• Visitor Numbers	

Build leadership capacity within local tourism related industry	Dissolve current Strategic Plan Tourism Action Group in favour of establishing a cross industry reference group that can focus on tourism outcome. The reference group should operate under the guidance of Council's Economic Development Committee Recognize the Central Coast Chamber of Commerce and Industry as the peak local tourism group	Yr 1 Yr 1	Local Industry Chamber of Commerce and Industry and local tourism sector	General Manager General Manager	• Investment • Employment • Enterprise • Investment • Employment • Enterprise	
Enterprise Development						
Create an environment conducive to investment	Review Council's Economic Development Strategy Review role and makeup of Council's Strategic Planning Action Groups	Yr 1 Yr 1	DED DED	General Manager General Manager	• Investment • Employment • Enterprise • Community Pride • Satisfaction • Visitor Numbers	$5,000 Perform in house and have capacity to outsource specific expertise requirements
Facilitate opportunities for businesses within local core industry sectors that can add value to their enterprise through tourism outcomes	Under auspice of the local economic development plan, convene a series of industry sector forums to identify and prioritize specific local projects (an action plan) that will deliver significant tourism outcomes. Key industry sectors include: ○ Agriculture ○ Retail and services ○ Hospitality	Yr 1 and annually	DED, Industry Peak Bodies, Cradle Coast Authority, local industry	General Manager	• Investment • Employment • Enterprise	$20,000 in year 1. May be some justifiable expenditure in future years (subject to separate business case) Funding should target development of sustainable projects that will generate substantial external funding Expect industry peak

						bodies' financial support
Develop capacity of local industry sectors to deliver tourism outcomes	In conjunction with the Department of Economic Development and Industry Peak Bodies, convene industry sector forums to determine training and support needs and opportunities In conjunction with local business, consider developing a pilot program to trial extended operating hours during next visitor season – consider a rostering approach	Yr 1 and annually Yr 1	DED, Industry Peak Bodies, Cradle Coast Authority, local industry Chamber of Commerce and Local industry	General Manager General Manager	• Investment • Employment • Enterprise • Satisfaction • Satisfaction • Visitor Numbers • Visitor Yield	In kind In kind
Increase capacity to deliver improved visitor experiences	Develop and implement specific themed experience strategies in conjunction with local industry sectors. Focus on strategies that have links to State's and Cradle Coast Experience Strategy, such as: Short term ○ Food and Produce / Agricultural Interpretation ○ Tracks and Trails (Including cycling) ○ River / Angling Access ○ Recreational retail Longer term ○ Waterfalls and Nature based ○ Culture and Arts ○ Heritage ○ Angling Access Stage 2 – Develop Central Coast as an off shore fishing destination ○ Coastal Railway journeys (sub	Yrs 1-2 Yrs 2-5	Cradle Coast Authority, Tourism Tasmania and operators Cradle Coast Authority, Tourism Tasmania and operators	General Manager	• Community Pride • Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	Under economic development plan (seeding of $10,000 proposed for year 1) Expect industry and grant funding support Under economic development plan (seeding of $20,000 proposed for year 2) Likely to attract external funding and in kind

	regional experience)					support from service clubs, operators and government sponsored employment programs
	Investigate feasibility of development of an organic growers market / educational and interpretation centre and visitor attraction	Yr 1	TFGA, Cradle Coast Authority, Local industry	General Manager	• Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	Linked to Produce and Agricultural Experience Strategy. Council owns a site with lease about to expire. Study required to identify whether concept is feasible and if the Council site is suitable Study would be a prerequisite to generate grant funding and industry support
	Develop an interpretive approach to experiences	Yr 2 onwards	Tourism Tasmania, Cradle Coast Authority	Corp and Comm	• Satisfaction • Visitor Numbers • Visitor Yield	There may be justifiable expenditure in future years – subject to a separate business case Likely to attract external funding and in kind support from service clubs, operators and government sponsored employment programs
Improve capacity to attract major events	In conjunction with neighboring Councils develop a coordinated approach to attraction of major events and conferences to the local area	Yr 2	Neighboring Councils, Tourism Tasmania, Events Tasmania	Corp and Comm	• Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment	In kind

	Create a central database that includes the local attractions, accommodation and services etc Encourage the State Government to offer incentives to attract events and conferences to the local area	Yr 1 Yr 1	Neighboring Councils, State Government	Corp and Comm Corp and Comm	• Enterprise • Visitor Numbers • Visitor Numbers • Visitor Yield	In kind
Communication and Marketing						
Develop capacity for generating local visitor market research and analysis	Lobby Tourism Tasmania for local inclusion in TVS Market research Participate in Tourism Tasmania's local market research collection pilot program Develop a cooperative approach with Devonport, Latrobe and Kentish Councils to regular collection and analysis of visitor market research	Yr 1 Yr 1 and annually Yr 1 and annually	Tourism Tasmania Tourism Tasmania Devonport, Latrobe and Kentish Council	General Manager Corp and Comm Corp and Comm/ General Manager	• Visitor Numbers • Visitor Yield • Visitor Numbers • Visitor Yield • Visitor Numbers • Visitor Yield	There may be a future years as per business case In kind – future years as per business case
Leverage off Touring Route Strategies	Continue with current commitment to Great Nature Trail Approach Cradle Country Councils with a view to inclusion in joint promotion of touring route Lobby to have the Cradle Country Touring Route realigned to come via Central Coast	Ongoing Yr 1 Yr 1	Touring Route Councils and Cradle Coast Authority Touring Route Councils and Cradle Coast Authority Touring Route Councils, Cradle Coast Authority and Tourism Tasmania	Corp and Comm General Manager General Manager	• Visitor Numbers • Visitor Yield • Visitor Numbers • Visitor Yield • Visitor Numbers • Visitor Yield	Coast to Canyon Brochure as per Brand Application –ongoing print costs as per usual operating expense Will incur a cost from year 2 onwards subject to a business case

Improved Visitor Information Services	Continue to develop Visitor Centre Business Plan for inclusion in TVIN	Yr 1	TVIN Councils and Tourism Tasmania	Corp and Comm	• Satisfaction • Visitor Numbers • Visitor Yield	In kind
	Redevelop Council Tourism Web page to a Coast to Canyon Web Site - link web site to major tourism sites such as 'Discover Tasmania	Yr 1	Local operators	Corp and Comm and General Manager	• Satisfaction • Visitor Numbers • Visitor Yield	In kind. Ongoing maintenance in house
	Encourage Tourism Tasmania and Cradle Coast Authority to include the local area in Visiting Journalist Programs	Yr 1	Tourism Tasmania and Cradle Coast Authority	General Manager	• Visitor Numbers • Visitor Yield	In kind
	Encourage Tourism Tasmania and Cradle Coast Authority to include the local area in their promotional materials / campaigns, such as Rejuvenating Journeys	Yr 1	Tourism Tasmania and Cradle Coast Authority	General Manager	• Visitor Numbers • Visitor Yield	In kind
	Encourage Tourism Tasmania and regional airport authorities to promote the region and its air entry points more aggressively to increase awareness interstate	Yr 1	Airport Authorities, Tourism Tasmania and Cradle Coast Authority	General Manager	• Visitor Numbers	
	Investigate feasibility of relocating Penguin Visitor Centre and Central Coast Service Centre to the proposed Penguin visitor precinct.	Yr 1		Corp and Comm	• Satisfaction • Visitor Numbers • Visitor Yield	As per proposed Penguin Visitor precinct Master Plan – subject to business case
Develop the Coast to Canyon Brand application and management	Develop brand application materials and collateral, including image library and style guide and templates etc	Yr 1	Chamber of Commerce and operators	General Manager	• Visitor Numbers	As per existing approved budget – project will attract up to $20,000 from Cradle Coast Authority

	In conjunction with Chamber of Commerce develop a set of Brand Management guidelines	Yr 1	Chamber of Commerce	General Manager	• Visitor Numbers	In kind
Introduce a program of seasonal festivals / events	Develop a Festivals Strategy based around 'Coast to Canyon Core Appeals and Experiences ▪ Multi day event around Ulverstone Show – leverage off an add value to the agricultural sector (eg food and produce) ▪ Capitalize on seasons and low times of year and where possible piggy back on related events and festivals in the broader local area ▪ Develop individual and multi precinct events and festivals ▪ Review Council event financial support to focus on events / festivals that deliver substantial destination outcomes	Yr 2	Service Clubs, Community Groups, industry groups and Cradle Coast Authority	Corp and Comm	• Satisfaction • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	In kind and Council's merit based grant scheme
Improve visitor awareness of local destination	Develop a targeted combined destination promotion strategy in conjunction with neighboring Councils and Cradle Coast Authority ▪ Includes continuation of support for Cradle Regional Guide, and a contribution to developing an expanded Cradle Country Touring Route booklet Encourage private investment in destination promotion	Yr 1 and ongoing Yr 1 and annually	Neighboring Councils, Cradle Coast Authority and local industry Cradle Coast Authority and local industry	Corp and Comm Corp and Comm	• Visitor Numbers • Visitor Yield • Visitor Numbers • Visitor Yield • Investment • Employment • Enterprise	In kind – and as per existing internal promotion and advertising budget (also expect industry support) Additional future expenditure based on generated income from industry

	Develop commercially viable merchandise for sale from visitor centres and commercial outlets (linked to branding application) (Part of year 1 expenditure should include contracting out of production of targeted promotion plan and merchandise)	Yr 1 and ongoing	Chamber of Commerce and local industry	Corp and Comm	• Satisfaction • Visitor Yield	Expect a financial contribution from industry Additional future expenditure on merchandise should be generated through sales revenue

Performance Indicator Codes:

- Level of local community pride regarding the municipal area = Community Pride
- Visitor satisfaction with the destination = Satisfaction
- Change in visitor numbers = Visitor Numbers
- Change in visitor yield = Visitor Yield
- Level of private and public investment in tourism infrastructure and ventures = Investment
- Changes in visitor related employment levels = Employment
- Increased visitor related local business enterprise = Enterprise

Responsibility Codes (Department):

- General Manager = General Manager
- Corp and Comm = Corporate and Community Development
- Assets and Eng = Assets and Engineering

Short Term Financial Implications:

Year 1			**Year 2**		
General Manager	Corp and Comm	Assets and Eng	General Manager	Corp and Comm	Assets and Eng
$95,000	$30,000	$0	$20,000	$45,000	$30,000
Total Year 1	**$125,000**		**Total Year 2**	**$95,000**	