

Tasman Tourism Development Strategy
2011 – 2016

Final report
January 2011

Prepared for the Tasman Council

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Jan Barwick, Mayor, Tasman Council

Wendy Hunter, General Manager, Tasman Council

Kate McCarthy, Project Manager and Tourism, Economic & Community Development Officer, Tasman Council

David Moser, Councillor, Tasman Council

Claire Ellis, Director Infrastructure and Industry Development, Tourism Tasmania

Rita Warrenner, Manager Destination Development, Infrastructure & Industry Development, Tourism Tasmania

Stephen Large, CEO, Port Arthur Historic Sites Management Authority

Andrew Ross, Marketing Manager, Port Arthur Historic Sites Management Authority

Roger Self, Chairman, Port Arthur and Tasman Tourism Association

Ashley Rushton, Regional Manager Southern Tasmania, Parks and Wildlife Service

Grant Hall, Parks and Reserves Manager South East Coast, Parks and Wildlife Service

Kathy Wiedner, Secretary, Port Arthur and Tasman Tourism Association.

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The Tasman Tourism Development Strategy 2011 -2016 was developed with assistance from the Tasman Council, Tourism Tasmania, Tasmania Parks and Wildlife Service and the Port Arthur Historic Sites Management Authority.



Note: The following is intended as a summary document for the project's principal stakeholders. It supports the Action Plan. A full report follows the Action Plan.

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STRATEGY CONTEXT

The Tasman Tourism Development Strategy 2011 - 2016 is a result of the Tasman Council's need to update, refine and enhance the previous Strategy to ensure that the region's tourism industry can thrive in a rapidly evolving environment. Its development has been guided by:

- Detailed research of related documentation;
- A review of the previous Tasman Tourism Development Strategy 2005 – 2008;
- Key trends in the tourism industry;
- A rigorous consultation process; and
- Relevant planning issues.

Revised strategies and actions have been included where appropriate.

The previous Strategy also recommended a new brand positioning where a 'Sea Cliff Coast' precinct was established to highlight the region's magnificent natural heritage. The Strategy illustrated 'a potential brand model to encompass both the existing and potential Tasman experience'.¹ The revised Strategy acknowledges the importance of the region's magnificent coastal seascapes but also recognises that historic heritage still underpins the Tasman brand. These attributes are in fact complementary and exemplify the area's rich diversity.

This is based on the fact that the coastal precinct is incomplete and requires further resources to establish it as a significant visitor experience. The advent of the Three Capes Track is likely to enhance the region's nature-based offerings but its full impact will most likely not occur within the time span of this Strategy.

The Strategy acknowledges that the Tasman municipality is small and therefore has limited resources. It provides achievable, realistic and practical actions that are capable of delivering some short term gains to achieve the new Strategy's goal, engage the industry and clarify the role of Council in tourism.

STRATEGY STRUCTURE

The Strategy proposes the single, most important goal for tourism in the Tasman; an assumption based on the consultants' findings throughout the multi-faceted research phase of the project. It is supported by a series of actions to achieve that goal. These actions are divided into three key sections; governance, marketing and development, which reflect the core principles of best practice destination management in Australia today:

¹ TTDS 2005-2008, p.17

STRATEGY STRUCTURE cont.

1. Destination *governance* relates to industry leadership, structure and capacity-building - the foundation stones;
2. Destination *marketing* in this instance addresses the need for a strategic, coordinated and cooperative approach; and
3. Destination *development* captures the issues of infrastructure, investment and planning to drive and support industry growth.

According to *A National Framework for Best Practice Destination Management Planning*, 'DMP' is a step forward from traditional destination marketing roles and provides a more holistic and integrated approach to understanding the tourism potential of each destination and the best methods of maximizing that potential'.²

The Action Plan's timeframe is eighteen months from the completion of this project. It is envisaged that a new Action Plan will be developed mid-2012. This timeframe is deliberately shorter than the previous Strategy for the following reasons:

- It enables an alignment between this Action Plan and other strategic plans of Council and collaborating partners;
- It aligns the Action Plan with the budgeting cycles of the respective implementing organisations;
- It recognises that this is a 'living' document that will need to respond to internal and external factors over time; and
- The Action Plan must be subjected to regular evaluation throughout the life of the new Strategy.

STRATEGY GOAL

To increase overnight visitor stays in the Tasman region

In order to boost local tourism, build yield and ensure a sustainable industry, visitors to the Tasman must simply stay longer and spend more. As noted in the previous Strategy, it is vital that the region is perceived as an 'overnight touring destination' which is able to deliver on that promise.

For this goal to be achieved, the local tourism industry, the Tasman Council and associated stakeholders will require a sustained commitment and focus, driving the Action Plan to fruition within the recommended timeframes.

² Dept. of Resources, Energy and Tourism, *A National Framework for Best Practice Destination Management Planning*, 2007, p.4

GOAL RATIONALE

The goal has been identified within the following context:

- The region has enjoyed relatively high visitation for some time;
- There is considerable scope to convert the 63% of day visitors who travelled through the area (ye June 2010) but chose not to stay;
- The Tasman is geographically close to Hobart, the State's major gateway and effective marketing can maximise the accompanying advantages;
- A range of attractive visitor experiences already exist and in some instances, there is the capacity to add value and interest through further enhancements;
- Several new and significant products remain at various stages of development;
- The accommodation sector currently has sufficient inventory but is not at full occupancy;
- While food and beverage outlets are limited, there is a reasonable choice of price and style with increased potential through active networking and cooperation;
- Most importantly, there is a strong need to build yield across all sectors of the local tourism industry.

CRITICAL SUCCESS FACTORS FOR THE STRATEGY

Five factors have been identified as critical to the success of this Strategy:

- 1.** The Tasman Council drives the implementation of the Action Plan.

This does not suggest that the Council is the sole source of funds, human resources or expertise, but rather that it assumes a project management role in conjunction with the existing Steering Committee.

While it is implied that Council will be involved in each of the Actions, the degree of involvement will vary; in some instances, the identified collaborating partners will have more responsibility.
- 2.** PATTA is a strong, viable and relevant local tourism association.
- 3.** The Strategy's implementation is sufficiently resourced through a dedicated, paid, part-time position *working with PATTA, but ultimately responsible to the Council.*
- 4.** A commitment to the Action Plan from the major stakeholders, *based on a coordinated, collaborative approach.*
- 5.** The Tasmanian tourism industry maintains or increases its market share.

Tasman Tourism Development Strategy 2011 – 2016

ACTION PLAN

1. DESTINATION GOVERNANCE

	ACTIONS	COLLABORATING PARTNERS	TIMING	PRIORITY
1.1	<p>Clearly identify and communicate Council's role:</p> <p>1.1.1 Clearly define and communicate the Council's role in the delivery of this Strategy to all stakeholders</p> <p>1.1.2 Communicate the findings and implications of the regional tourism review conducted by Tourism Tasmania.</p>	<p>Tasman Council Tourism Tasmania PATTA</p>	Within month 1	High
1.2	<p>PATTA as the key tourism organisation in the Tasman:</p> <p>1.2.1 Clearly define and communicate PATTA's role to all stakeholders, including its role in the delivery of this Strategy</p> <p>1.2.2 Determine the level of support needed to ensure that PATTA is an effectively functioning LTA.</p>	<p>PATTA Tasman Council</p>	Within month 1	High
1.3	<p>Establish a dedicated paid position to support the local tourism industry:</p> <p>1.3.1 Establish a funding source and mechanism for a dedicated paid position</p> <p>1.3.2 Develop a job description for the position above, with a focus on a part-time marketing/coordinating role (8 - 16 hours per week)</p> <p>1.3.3 Engage a suitable person for the position.</p>	<p>Tasman Council PATTA</p>	Completed by month 3	High
1.4	<p>Set up industry forums to inform industry of TTDS 2011 -2016 and its progress:</p> <p>1.4.1 Forums to be held six-monthly and all stakeholders invited.</p>	<p>Tasman Council PATTA</p>	Months 6,12 and 18	Medium
1.5	<p>Seek discussions with the Sorell and other relevant Councils to determine whether there are opportunities for collaboration in the development and governance of tourism in the region.</p>	<p>Tasman Council Sorell/Clarence Councils</p>	Ongoing	Low
1.6	<p>Continue to lobby for support for all aspects of tourism development in the region.</p>	<p>Tasman Council PATTA TICT</p>	Ongoing	Medium
1.7	<p>Monitor and assist in the implementation of the Strategy through regular progress meetings.</p>	<p>Tasman Council Project Steering Committee</p>	Months 6,12 and 18	Medium

Note: Lead agency/agencies is in **bold**.

ACRONYM LEGEND

DEDTA Dept of Economic Development, Tourism and the Arts
DIER Dept of Industry, Energy and Resources
DPIWE Dept of Primary Industries, Parks, Water and Environment

H&SZMG Hobart and Surrounds Zone Marketing Group
PATTA Port Arthur and Tasman Tourism Association
PAHSMA Port Arthur Historic Sites Management Authority

PWS Parks and Wildlife Service
TALSC Tasmanian Aboriginal Land and Sea Council
TICT Tourism Industry Council of Tasmania

Tasman Tourism Development Strategy 2011 – 2016

ACTION PLAN cont.

2. DESTINATION MARKETING

	ACTIONS	COLLABORATING PARTNERS	TIMING	PRIORITY
2.1	<p>Develop a comprehensive marketing strategy that focuses on accessing, informing and motivating visitors when making the choice to travel to Tasmania and therefore increasing decisions to stay overnight in the region:</p> <p>2.1.1 Review brand strategy 2.1.2 Review web-based applications for marketing the region 2.1.3 Commission the development of detailed marketing plans for each customer segment 2.1.4 Upgrade web site to package product – quality accommodation and experiences.</p>	<p>Tasman Council PATTA PAHSMA Tourism Tasmania</p>	<p>Immediately and completed by month 6</p>	<p>High</p>
2.2	<p>Establish a collegiate working group of operators that exchange market information and form commercial relationships to package the region's experiences.</p>	<p>Tasman Council PATTA</p>	<p>Ongoing</p>	<p>Medium</p>
2.3	<p>Explain the new Strategy to industry media with fresh and engaging images and editorial.</p>	<p>Tasman Council PATTA</p>	<p>On completion of marketing strategy</p>	<p>Dependent on 2.1</p>
2.4	<p>Utilise the Visiting Journalists' Program to feature historic heritage, together with nature-based and adventure experiences.</p>	<p>Tasman Council PATTA Tourism Tasmania</p>	<p>As opportunities present</p>	<p>Dependent on 2.1</p>
2.5	<p>Conduct meetings of stakeholders to assist the implementation of the new marketing strategy.</p>	<p>Tasman Council PATTA Tourism Tasmania</p>	<p>On completion of marketing strategy</p>	<p>Dependent on 2.1</p>
2.6	<p>Revise the website, particularly the home page, to reflect the need to stay overnight in the region.</p>	<p>PATTA Tasman Council</p>	<p>Immediately</p>	<p>High</p>
2.7	<p>Meet with Hobart and Surrounds Zone Marketing Group to explore marketing options, with a view to increasing cooperative marketing opportunities for operators in the region.</p>	<p>PATTA Tasman Council H&SZMG Tourism Tasmania</p>	<p>Immediately</p>	<p>High</p>

Note: Lead agency/agencies is in **bold**.

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ACTION PLAN cont.

3. DESTINATION DEVELOPMENT

ACTIONS		COLLABORATING PARTNERS	TIMING	PRIORITY
3.1	<p>Improve signage, both directional and interpretative, within the region:</p> <p>3.1.1 Develop a signage strategy for the region as per the Tasman Interpretation Framework 2009 – 2011</p> <p>3.1.2 Change the directional sign at the junction of Nubeena Road and Arthur Highway to indicate the road is a loop road, not a choice of two directions.</p>	<p>Tasman Council DIER Tourism Tasmania Sorell Council</p>	Completed by month 12	Medium
3.2	<p>Develop an investment-ready program that targets particular sites for specific developments:</p> <p>3.2.1 Develop an investment program which identifies gaps and opportunities, potential sites for development, potential partners (asset owners) to implementation stage</p> <p>3.2.2 Explore the potential for a visitor centre to be incorporated into investment- ready program</p> <p>3.2.3 Investigate land availability for proposed facilities at a gateway entrance to the region. Please note: This program could address several different accommodation facilities, eg. five star, backpackers, caravanning, or attractions development.</p>	<p>Tasman Council Tourism Tasmania PWS DPIWE</p>	Completed by month 12 to implementation stage	Medium
3.3	<p>Support and strengthen the capacity of tourism businesses in the region:</p> <p>3.3.1 Support and encourage food and beverage establishments and adventure and activity operators through the identification of existing assistance programs for small businesses</p> <p>3.3.2 Develop an innovative experience for the loop road to encourage visitors around the Peninsula.</p>	<p>Tasman Council DEDTA Tourism Tasmania</p>	Ongoing	Low
3.4	<p>Investigate the ability to develop Aboriginal tourism, post-convict heritage and new nature-based experiences that complement 3CT and day walks.</p>	<p>Tasman Council TALSC PATTA PWS</p>	Completed by month 18	Low
3.5	<p>Upgrade the existing walking track from the Blowhole to Devil’s Kitchen to form a 1½ hour circuit.</p>	<p>PWS Tasman Council Funding dependent</p>	Completed by month 18	Medium
3.6	<p>Upgrade Waterfall Bay Road and mark car spaces on ground at the site.</p>	<p>PWS Tasman Council Funding dependent</p>	Completed by month 18	Medium

Note: Lead agency/agencies is in **bold**.

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ACTION PLAN cont.

3. DESTINATION DEVELOPMENT

ACTIONS		COLLABORATING PARTNERS	TIMING	PRIORITY
3.7	Install toilets at Devil's Kitchen.	PWS Tasman Council Funding dependent	Completed by month 18	Medium
3.8	Initiate a comprehensive feasibility study for the development of all three zones; planning to encompass parking, traffic management, pedestrian and disabled access issues: 3.8.1 Development of facilities in Zone 3 will be dependant on zone feasibility study.	Tasman Council PWS DIER	Completed by month 12	Medium
3.9	Continue lobbying to increase and improve the condition of roads in the region.	Tasman Council PATA DIER	Ongoing	Low
3.10	Improve public amenities including toilets, picnic facilities, rubbish facilities and parking: 3.10.1 Develop a plan of incremental improvement of these facilities across the region.	Tasman Council PWS	Ongoing	Medium
3.11	Adopt the six Key Principles for Tourism Development Planning within the planning framework: Principle 1 Adoption of national standards and accreditation for developments Principle 2 Consistency with planning reform at regional and state levels Principle 3 Flexibility in planning controls, particularly for visitor accommodation Principle 4 Use of appropriate consultation processes Principle 5 Encouragement of adaptive reuse of heritage sites for tourism developments Principle 6 Recognition of significant visual and cultural landscapes.	Tasman Council Tasmanian Planning Commission	Undertake as part of drafting new Planning Scheme	High
3.12	Consider new Draft National Tourism Planning Guide.	Tasman Council	As above	Medium

Note: Lead agency/agencies is in **bold**.

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ACTION PLAN cont.

3. DESTINATION DEVELOPMENT

ACTIONS		COLLABORATING PARTNERS	TIMING	PRIORITY
3.13	<p>Implement a new planning approach to tourism developments:</p> <p>3.13.1 Prepare a new Planning Scheme that covers the entire Tasman municipal area to provide greater consistency for developers and the local community; this should be based on the Common Key Elements Template and the directions of the Southern regional Planning Framework</p> <p>3.13.2 Develop a development guidance document for tourism proposals which deals with location, design, construction materials, heritage and environmental assessments, access, services and landscape setting</p> <p>3.13.3 Incorporate greater flexibility in planning instruments to reflect the diversity of tourism activities, visitor accommodation types and local economic factors</p> <p>3.13.4 Implement a simplified development approval process for short-term accommodation facilities.</p>	<p>Tasman Council Tasmanian Planning Commission</p>	Undertake as part of drafting new Planning Scheme	Medium
3.14	<p>Ensure the local planning framework is updated to cater for the World Heritage listing of the Port Arthur and Coal Mines Historic Sites.</p>	<p>Tasman Council PAHSMA Tasmanian Planning Commission</p>	Undertake as part of drafting new Planning Scheme	Dependent on 3.13
3.15	<p>Diversify historic heritage experiences across the Tasman region:</p> <p>3.15.1 Develop a Heritage Management Plan and review existing inventory for the Tasman Municipality</p> <p>3.15.2 Incorporate guidance on adaptive reuse and conservation management approaches as a key element for tourism projects</p> <p>3.15.3 Assess cultural landscapes as part of the HMP.</p>	<p>Tasman Council Heritage Tasmania PAHSMA</p>	Completed by month 12	Medium

Note: Lead agency/agencies is in **bold**.

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The project is to deliver a best practice destination management plan for the Tasman region through a review of the 2005-2008 Tasman Tourism Development Plan and the development of a 2010-2015 plan.

Source: Consultancy Brief: Tasman Tourism Development Strategy 2010 – 2015, p.2

INTRODUCTION

The Tasman region is blessed with an abundance of cultural and natural riches. Its coastline is both breathtaking and unique, with towering sea cliffs and dramatic coastal formations. The Port Arthur Historic Site is its most recognisable icon. Attracting 300,000 visitors annually, it has been acknowledged as a place of international significance, having recently achieved World Heritage status along with the Coal Mines Historic Site nearby.

Still there is more...giant forests of sea kelp, fur seals, dolphins and ethereal leafy sea dragons are part of a fascinating and diverse marine life; soaring sea eagles and more than 100 bird species share their habitat with abundant quolls, wombats, echidnas, Tasmanian devils and other distinctive wildlife and the Tasman and Forestier Peninsulas are home to no less than 30% of our island's plant life.

The Tasman National Park is one of Tasmania's favorite outdoor attractions and the region has thirty-five of the State's most spectacular coastal bushwalking trails. The proposed Three Capes Track promises an unforgettable experience and a range of economic opportunities for Tasman businesses.

Several 'high-end' accommodation properties remain under consideration and the Port Arthur Historic Site is planning to introduce new and innovative visitor experiences to complement existing offerings.

Over time, the region's natural beauty has attracted new residents and new ideas. Locally-grown produce is emerging as a niche opportunity and saffron, truffles, quail and other delicacies are becoming more common. A thriving arts community draws inspiration from a magnificent landscape.

The Southern Tasmania Regional Land Use Framework report on Tourism and Land Use Planning noted that 'Hobart City and the Tasman Peninsula have the most potential for significant short-to-medium term growth...'¹ based on upcoming demand drivers.

Conversely, the Peninsula's potential may be viewed as a double-edged sword. The municipality is one of the smallest in the State with a population of approximately 2000 and a very low ratepayer base. An appropriate balance between the respective needs and expectations of communities and visitors poses a significant challenge.

¹ Southern Tasmania Regional Land Use Planning (draft), April 2009, p.5

PROJECT CONTEXT AND SCOPE

To date, the Tasman Tourism Development Strategy 2005-2008 (TTDS) has been guiding tourism development, management and marketing in the Tasman region. Given the passage of time and the current potential for change in the region, the Tasman Council and Tourism Tasmania determined a need to conduct a comprehensive review of the existing Strategy and the delivery of 'an innovative, forward-thinking, market-led tourism development plan...based on best practice destination management planning'.² It is envisaged that the life of the new plan will extend over five years to 2016.

Specifically, the purpose of the project is to:

- Review the four main strategies outlined in the 2005-2008 plan;
- Refine the vision for the future development of tourism in the Tasman region;
- Provide a forward-looking implementation plan.³

The Tasman Council provided a substantial amount of documentation relevant to the current project; this material has assisted in framing the questions for the consultation, reviewing the previous Strategy and informing the development of the revised plan. The consultants have also conducted their own research.

METHODOLOGY

The development of the updated Tasman tourism strategy has been informed by best practice destination management. While there is considerable research and documentation available, there are several recurring principles that underpin this concept. Broadly, they may be described as:

- Good governance or leadership;
- Effective marketing; and
- Sustainable tourism development.

Initially, the study area comprised five components which reflect a typical process for sound Destination Management Planning (DMP):

- 1.** Key market trends analysis;
- 2.** Stakeholder consultation;
- 3.** Review of the Tasman Tourism Development Strategy 2005-2008;
- 4.** A review of the Action Plans from the previous Strategy; and
- 5.** Tourism planning in the Tasman.

Note: These components were collated into 'Preliminary Findings', a 'working' document presented to the Steering Committee for comment in September 2010.

² Tasman Tourism Development Strategy 2010 – 2015, Consultancy Brief, p.1

³ *ibid*, p.2

According to *A National Framework for Best Practice Destination Management Planning*, 'DMP is a step forward from traditional destination marketing roles and provides a more holistic and integrated approach to understanding the tourism potential of each destination and the best methods of maximising that potential'.⁴

It is important that a DMP is aligned with the appropriate State tourism strategies as well as other relevant regional plans.

The **key market trends analysis** originally included some comparative evaluation between the 'Market Analysis' conducted during the development of the previous Strategy and Tasmanian Visitor Survey (TVS) data for the year ending March 2010.

The draft 'Preliminary Findings' that constituted the initial work towards the TTDS 2011 – 2016 cautioned that the statistics provided at the time were subject to clarification. This was due to the change in data collection methods for the TVS between the period during which the original Strategy was formulated and the current project. It has subsequently been confirmed that the only reliable, comparative analysis can be made over the last four years to 2010.

Note: During the course of the project and after the completion of the initial investigation of market trends, the TVS quarterly data was updated to year ending June 2010. The most recent data regarding the Tasman region (at the time of writing) has been included in **Attachment 1**.

The **stakeholder consultation** process was extensive and initially informed by a substantial amount of existing documentation.

Local communities have been involved in several major consultative processes in recent years, notably the Tasman Strategic Plan (Hunn and Lovell, 2009) and the Three Capes Track (Parks and Wildlife Service, 2006/07). Consultant, Anna Housego also conducted an Interpretation Workshop in August 2008 which focuses on the region's key themes and assets. The reports from these consultations provided an invaluable insight into community concerns and aspirations.

All stakeholder consultation was framed within four guiding principles:

1. The review and assessment of the previous Tasman Tourism Development Strategy 2005 – 2008;
2. The identification of current issues regarding tourism development and marketing;
3. The identification of gaps and challenges in the region's tourism industry; and
4. The provision of a lead organisation to assist in the coordination of tourism in the Tasman region.

The consultation process involved group meetings and individual discussions:

- A workshop conducted in Hobart with representatives from government and other key organisations;
- A community meeting conducted at Taranna; and
- Twenty-three face-to-face interviews with business operators, residents, Council staff within the Tasman region, as well as 'external' stakeholders – eg. the Clarence Council and the Federal Group.

⁴ Dept. of Resources, Energy and Tourism, *A National Framework for Best Practice Destination Management Planning*, 2007, p.4

The consultants also attended two other meetings which they considered relevant to the project:

- The PATTA (Port Arthur and Tasman Tourism Association) Annual General Meeting; and
- A meeting convened at the Tasmanian Devil Conservation Park to discuss regional food offerings.

The **review of the Tasman Tourism Development Strategy 2005-2008** was based on a step-by-step evaluation of the success or otherwise of the four 'sub-strategies'⁵ (objectives) that underpinned the previous Action Plans:

1. Maintain current market share and visitor volumes;
2. Encourage investment to address infrastructure and product gaps;
3. Develop an iconic natural, coastal precinct; and
4. Communicate and promote 'Destination Tasman'.

Outputs from the consultation process also provided significant insights.

Having assessed the four sub-strategies, a **review of the Action Plan** was developed; each action was classified according to its current relevance and progress with additional comments and assumptions included. The review clarified the status of the previous actions. The Steering Committee provided feedback.

The issue of **tourism planning in the Tasman** region was not addressed in any detail in the previous Strategy, however the consultants considered it an important addition to the current project. To this end, a specialist planner (John Wadsley) was included in the project team.

Current and future planning schemes were examined and six key principles for tourism development planning in the Tasman municipality have been identified. Other recommendations encourage a more flexible approach to potential tourism developments that complement existing values.

SIGNIFICANT FINDINGS

The current state of play

The Tasman Tourism Development Strategy 2005-2008 was a well-researched document. At the time, it was noted that the 'Tasman is about to witness an unprecedented level of private sector investment that will provide major change in the region'.⁶ High-profile businessman, Dick Smith was planning an eco-lodge near Crescent Bay and the Federal Group had purchased the Comfort Inn located in a prime position overlooking the Port Arthur Historic Site.

Five years later, there has been much discussion and consultation associated with these developments but neither of them have come to fruition. Dick Smith's development divided the local community and the investor's intentions are uncertain; and the Federal Group still owns the Comfort Inn, unchanged.

⁵ To avoid confusion the four 'strategies' within the TTDS 2005-2008 are referred to as 'sub-strategies' (of the original Strategy) for the purposes of this project

⁶ Tasman Tourism Development Strategy 2005 - 2008, p.12

In 2007, the State Government announced a proposal to develop the Three Capes Track – seemingly another boost for the region. While the concept is progressing and assuming it goes ahead, 'Three Capes' is unlikely to have a significant local impact until the life of this revitalised Strategy is almost at an end.

While the region remains on the cusp of change, recent experience suggests that the Tasman Peninsula community must continue to leverage from its current visitor activities and attractions, rather than waiting for any major development to improve their operating environment, including market share.

In comparison with other Tasmanian visitor destinations however, the Peninsula may be viewed with some degree of envy. It is well-positioned to increase both visitation and yield based on its existing key attractors; Port Arthur Historic Site including the Coal Mines nearby; Rob Pennicott's, Tasman Island Cruises and the Tasmanian Devil Conservation Park. All three businesses are in the process of developing new and exciting visitor experiences from which other local tourism enterprises can benefit.

Key market trends suggested a slowing market for Tasmania which reflects the tourism landscape across the country. During the course of this project, some indicators have gathered momentum:

- The high value of the Australian dollar is encouraging more outbound travel, which is also perceived as better value for money;
- Increasing fuel costs are impacting severely on the airline industry;
- A lack of consumer confidence;
- The prospect of increased interest rates;
- Changing travel patterns where consumers are choosing major population centres, rather than regional areas;
- More Australians travelling within their own State or Territory of residence;
- Travellers now have unparalleled access to a vast choice of holiday options which impacts on both their aspirations and their expectations.

Generally, Tasmania is performing better than its mainland counterparts. The State's most significant market – interstate visitors, has remained relatively steady.

The issue of regional dispersal is of concern Australia-wide. While some areas around Tasmania are reporting a downturn, an increase from 8.8 to 9.6 holiday nights in the year ending June 2010 suggests that our island remains a touring destination. Jetstar is also increasing its capacity into the North of the State from December 2010 with additional direct flights from Melbourne, Sydney and Brisbane. The State's extraordinarily high repeat visitation of over 60% augers well for outlying areas and increasing travel on the Spirit of Tasmania may prove a positive, as Spirit passengers tend to stay longer.

Trend data suggests a modest growth of 17% in interstate visitation to June 2017 and 19% in international visitation within the same period.

Summary of key regional market trends

Typically the Tasman regional tourism environment is a combination of challenges and opportunities:

- While Tasmania has enjoyed considerable growth in visitor numbers since June 2006, the total number of visitors to the Tasman has decreased slightly over the last four years; 25% of all visitors to Tasmania visited the region in the year ending June 2010.

- In terms of holiday visitors, the Tasman has attracted 42% of total Tasmanian holiday visitors (440,500) in the last twelve months.

Note: Based on TVS methodology, that data may be attributed equally to other regions as visitors tour through one area of Tasmania to another.

Tasman overnight stays have not significantly improved; in the year ending June 2010 only 37% of holiday visitors stayed overnight.

- The region's iconic attraction, Port Arthur Historic Site has retained a steady market share in both leisure and holiday visitation. With a current interstate and international visitation of 254,500, the Port Arthur Historic Site is second only to Salamanca Market as the most popular attraction in Tasmania. In the year ending June 2010, PAHS received 28% of total interstate and international visitors to Tasmania (910,200).
- 'Touring' remains the region's biggest holiday type accounting for 65% of all holiday visitors; Big Tour = 41% and Short Tour = 24%.

The Short Tour has remained steady for both the State (18%) and the region (24%). The most significant difference lies in the Visiting Friends and Relatives (VFR) market which has consistently remained around 6% for the Tasman and is currently 26% for the rest of Tasmania – rivaling the Big Tour. With regard to the Tasman, this may be linked with the relatively low population on the Peninsula.

- The Hobart and Surrounds zone includes the Tasman region. Both visitation and overnight leisure trips have remained reasonably steady in the last twelve months. With a total visitation of 717,500, there are substantial opportunities for the Tasman, given effective marketing.
- The Convict Trail remains Tasmanian's most popular touring route - despite a decrease of 11.3% in total holiday visitors from 336,500 in the year ending June 2009 to 298,300 in the year ending June 2010.

Note: This data should be viewed with some caution, as it covers a substantial area outside the Tasman including Richmond, one of Tasmania's most visited townships.

- The Tasmanian visitor market is dominated by an older demographic; those on 'lower' incomes slightly outnumber the more affluent, however the Tasman is well-positioned to continue attracting both lifestyle segments through a range of preferred activities.
- With Tasmanians taking just under 1m. trips annually within the State, the intrastate market offers potential growth for the region.

Note: There is no specific, broadly-based data available regarding intrastate travel to the Tasman region. Tourism Tasmania's snapshot of this market is based on the National Visitor Survey; the sample size of approximately 500 is very small and should be viewed with considerable caution.

STAKEHOLDER CONSULTATION

Common threads

- There seemed to be a general lack of understanding in relation to the previous plan; its goals, strategies and achievements.
- There was a strong emphasis with regard to increasing overnight stays in the region.
- A number of stakeholders mentioned the importance of encouraging visitors to complete the loop road around the Tasman peninsula.
- Although this consultancy was not required to explore potential sites for a new visitor information centre (VIC), the general opinion is that the VIC is not well situated within the region. The strongest suggestions indicated that the VIC should be at a gateway location such as Dunalley, Eaglehawk Neck or the previously identified site at the Tasman look-out.
- Zone marketing was generally considered a poor vehicle for marketing the region, particularly in achieving increased overnight stays. Currently only five operators advertise in the Hobart and Surrounds 'Holiday Planner'.
- The Council needs to provide leadership in the tourism sector but it was acknowledged that the resources available to the Council are limited.
- PATTA needs to be strengthened, particularly with the cessation of the regional tourism authority, Totally South Tourism.
- It was commonly remarked that PATTA also needs a dedicated, funded resource (person) to drive the Association; it would probably be on a part-time basis. Such a person could undertake activities and provide much-needed industry coordination.
- Convict heritage is the premier draw card for the region. Nature-based activities in line with the Sea Cliff Coast branding are growing but will take time to emerge as a strong attribute of the region's brand. It is acknowledged that the Three Capes Track will provide great potential to build the nature-based component of the brand.

REVIEW OF THE PREVIOUS STRATEGY

In reviewing the outcomes of the previous Strategy, some clear limitations emerged and ultimately compromised its effectiveness:

- The demise of the Port Arthur Region Marketing (PARM);
- Instability within the Port Arthur and Tasman Tourism Association (PATTA);
- Significant turnover within the Tasman Council;
- A lack of clear identification of a single organisation to bear the responsibility for implementing the Strategy; and
- Limited funding.

Having reviewed and assessed the previous Action Plan, there also appeared to be a disconnection between the actions and the identified sub-strategy in some instances. For example Strategy 1, *Maintain current market share and visitor volumes* where three of the five actions were more related to governance issues rather than positive marketing activities.

Many of the actions attributed to the previous Strategy are either partially completed or continuous; they have been transferred to the updated Plan.

TOURISM DEVELOPMENT PLANNING

Given the planning reforms being developed at regional and state levels, along with the deficiencies of existing planning schemes, a new planning approach needs to be implemented which is aligned with the Tourism Strategy.

The primary aim must be to provide certainty in how tourism developments are assessed at the local level, as well as providing encouragement for new developments. The key principles that need to be followed in developing a new planning approach for tourism development are outlined in Table 1.

Table 1 - Key Principles for Tourism Development Planning in Tasman Municipality

P1 National Standards	Tourism developments should be based on the adoption of appropriate national/state accreditation and/or standards schemes, particularly where building design and environmental guidelines are available.
P2 Consistency with Planning Reforms	Any new planning scheme and associated controls must be consistent with reforms being proposed at the regional and state level (notwithstanding that these are yet to be finalised).
P3 Flexibility in Planning Controls	As far as possible, planning controls such as zone definitions and use categories should provide greater flexibility in terms of allowing different tourism accommodation types and other developments which will not adversely affect the character of local towns and rural areas.
P4 Consultation	There must be proper consultation processes established that allow local communities and landowners to be properly informed of tourism development strategies and planning assessment protocols.
P5 Adaptive Reuse of Heritage Sites	The planning system should encourage appropriate and sensitive adaptive reuse of heritage structures to allow better conservation outcomes as well as enhancing tourism development opportunities.
P6 Significant Landscapes	There must be recognition within any new planning scheme of the importance of visually significant landscapes, both for their tourism appeal as well as their cultural and/or natural significance.

The proposed regional planning framework and a new planning scheme are necessary to provide Tasman Council, landowners and tourism developers with more consistent delivery of decision-making, policy development and planning guidance.

However, the key to tourism planning reform is through introducing flexibility to support the various tourism activities and developments that form part of the local economy. This flexibility should support appropriate development while recognising essential community, environmental and cultural values. Tourism development should be encouraged if it complements an area's overall character. Such flexibility can be achieved if the following elements are implemented:

- Use restrictions on tourism activities in various planning zones need to be removed to reflect the diversity of tourism enterprises across Tasman Municipality;
- A simplified development approval process is required for short-term accommodation facilities, particularly where these developments complement existing attractions and tourist destinations;
- Visually and culturally significant landscapes need to be recognised. This would help protect landscapes visible from tourist routes and tourist destinations as well as cultural heritage landscapes associated with heritage sites;
- Encouragement of appropriate and sensitive adaptive reuse of heritage structures to allow better conservation outcomes as well as enhancing tourism development opportunities. To that end a Heritage Management Plan and Inventory for the entire Tasman Municipality should be commenced as a matter of some urgency.
- Larger scale tourism developments or unusual projects will continue to be assessed on a site-specific basis; however, the test should be on how they are judged against a consistent set of performance standards addressing facility design, siting, access and infrastructure provision.

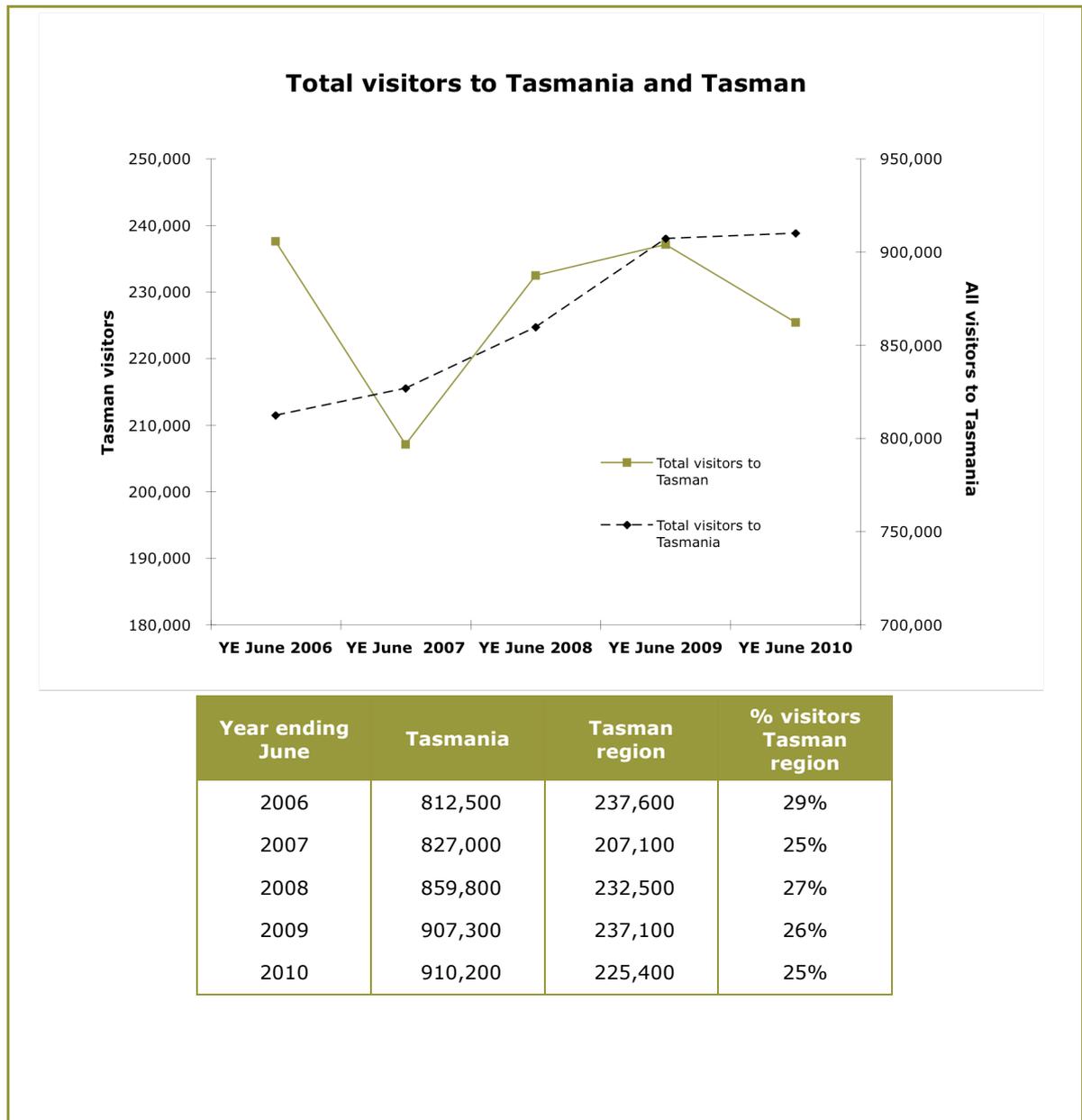
Tasman Tourism Development Strategy 2011 – 2016
Background report

ATTACHMENT 1.1: Tasman/Tasmania visitor data

Note: Tasmanian Visitor Survey (TVS) data is based on a sample of approximately 9000 visitors to the State. It is therefore subject to some variance and the results should be treated with appropriate caution.

Interstate and International Travel

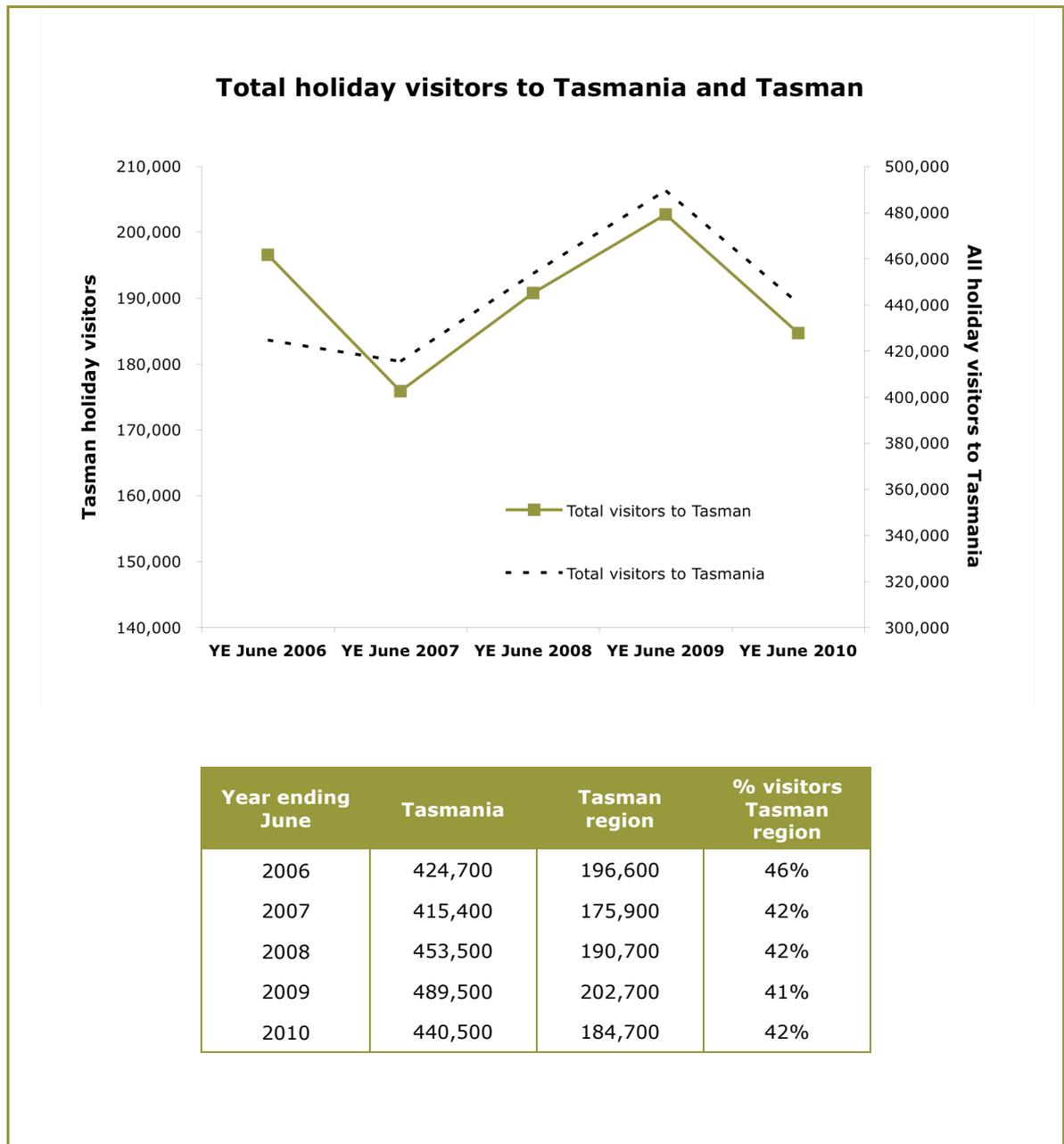
Table 1.1 Total visitation - Tasmania v. Tasman



Source: TVS

ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

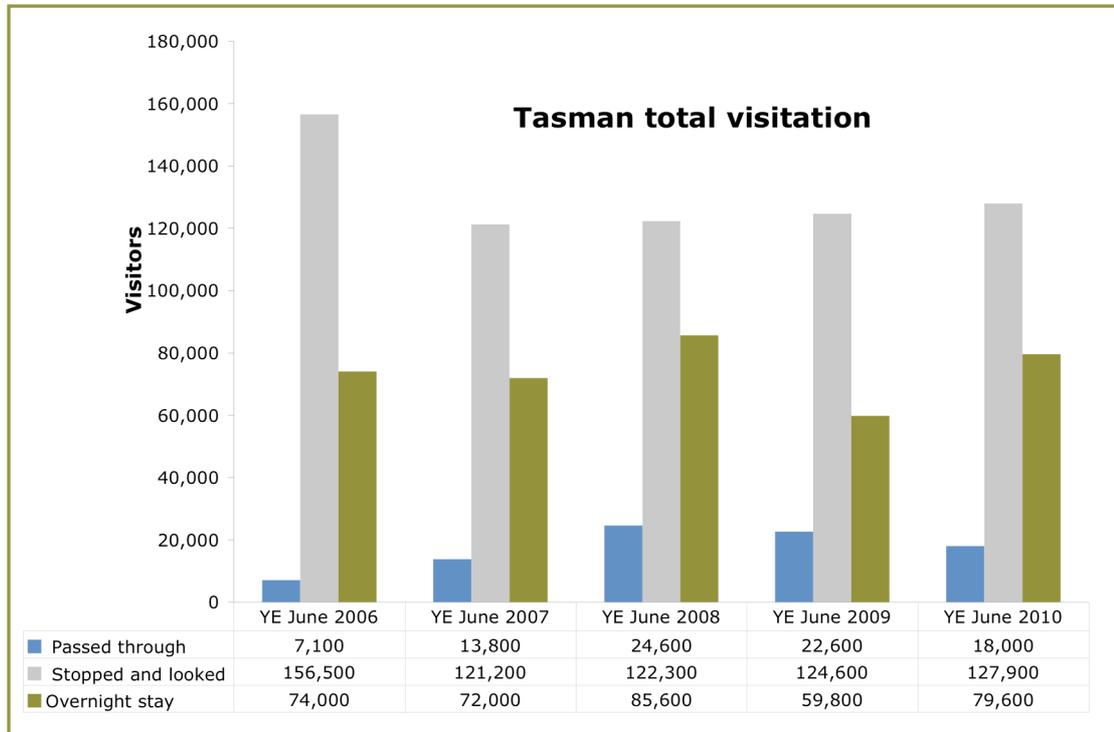
Table 1.2 Holiday visitation - Tasmania v. Tasman



Source: TVS

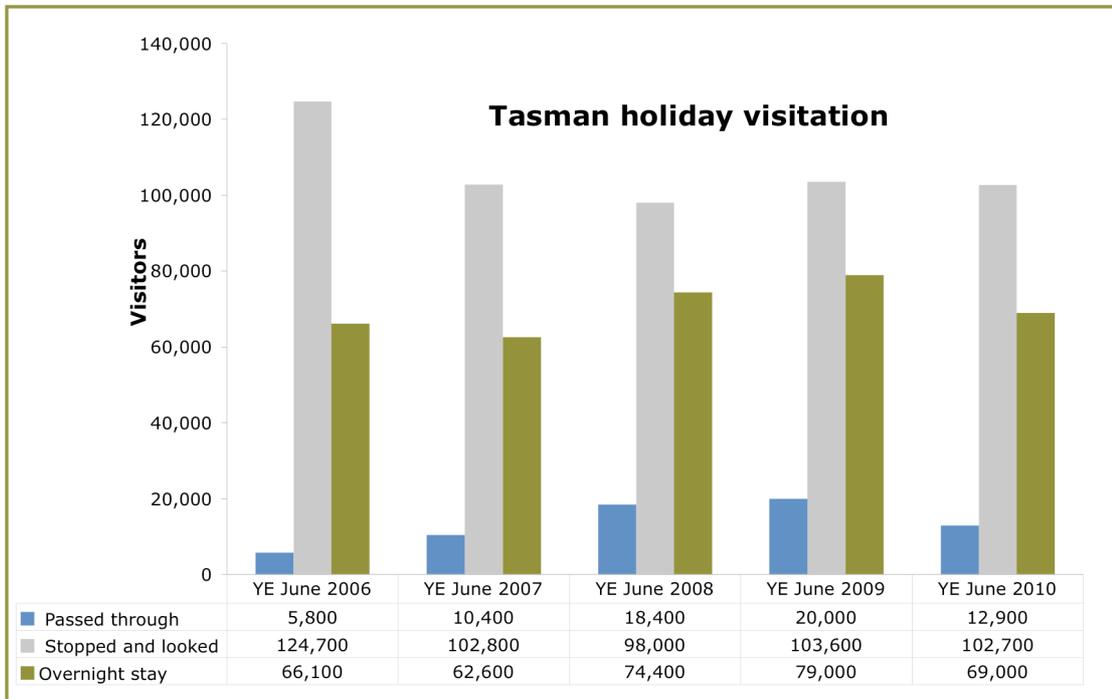
ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

Table 1.3 Total visitation – Tasman only



Source: TVS

Table 1.4 Holiday visitation – Tasman only

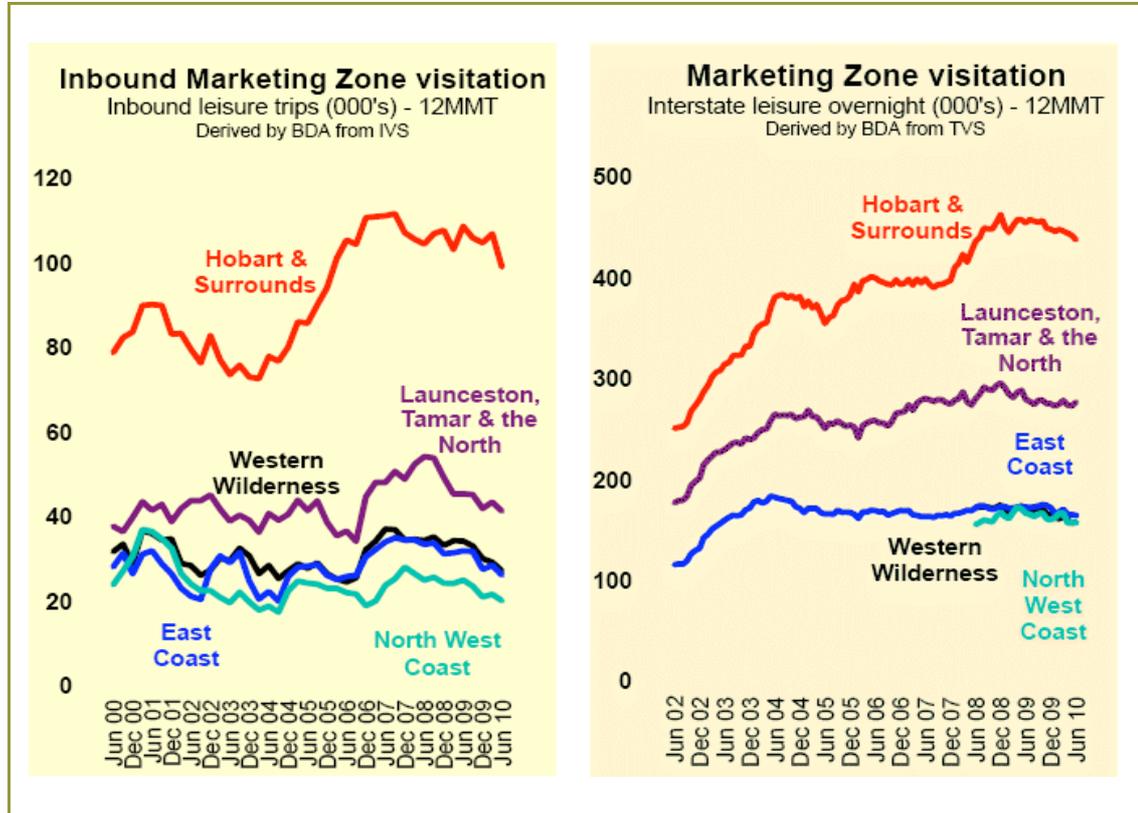


Source: TVS

ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

Tasman v. other Tasmanian regions

Table 1.5 Leisure overnight trips



Source: Brian Dermott & Associates (Tourism Tasmania)

Note: Several factors combine to suggest that the zone trend regarding overnight leisure trips is not particularly rigorous when applied to smaller regions – ie. in this case, the zone is dominated by the capital city and there is considerable variation in the maturity of individual regions in terms of tourism capacity.

Table 1.6 Hobart and Surrounds zone visitation ye June 2010

<ul style="list-style-type: none"> ▪ Total visitation (international + interstate) = 717,300 - 1% ▪ Interstate visitation = 604,900 +/- 0%

Source: Tourism Tasmania, Tasmanian Tourism Snapshot, year ending June 2010

ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

Table 1.7 The Convict Trail: total holiday visitors ye June 2010



Source: TVS

Port Arthur Historic Site

Table 1.8 PAHS share of visitation: Leisure visitors (holiday + VFR) to Tasmania

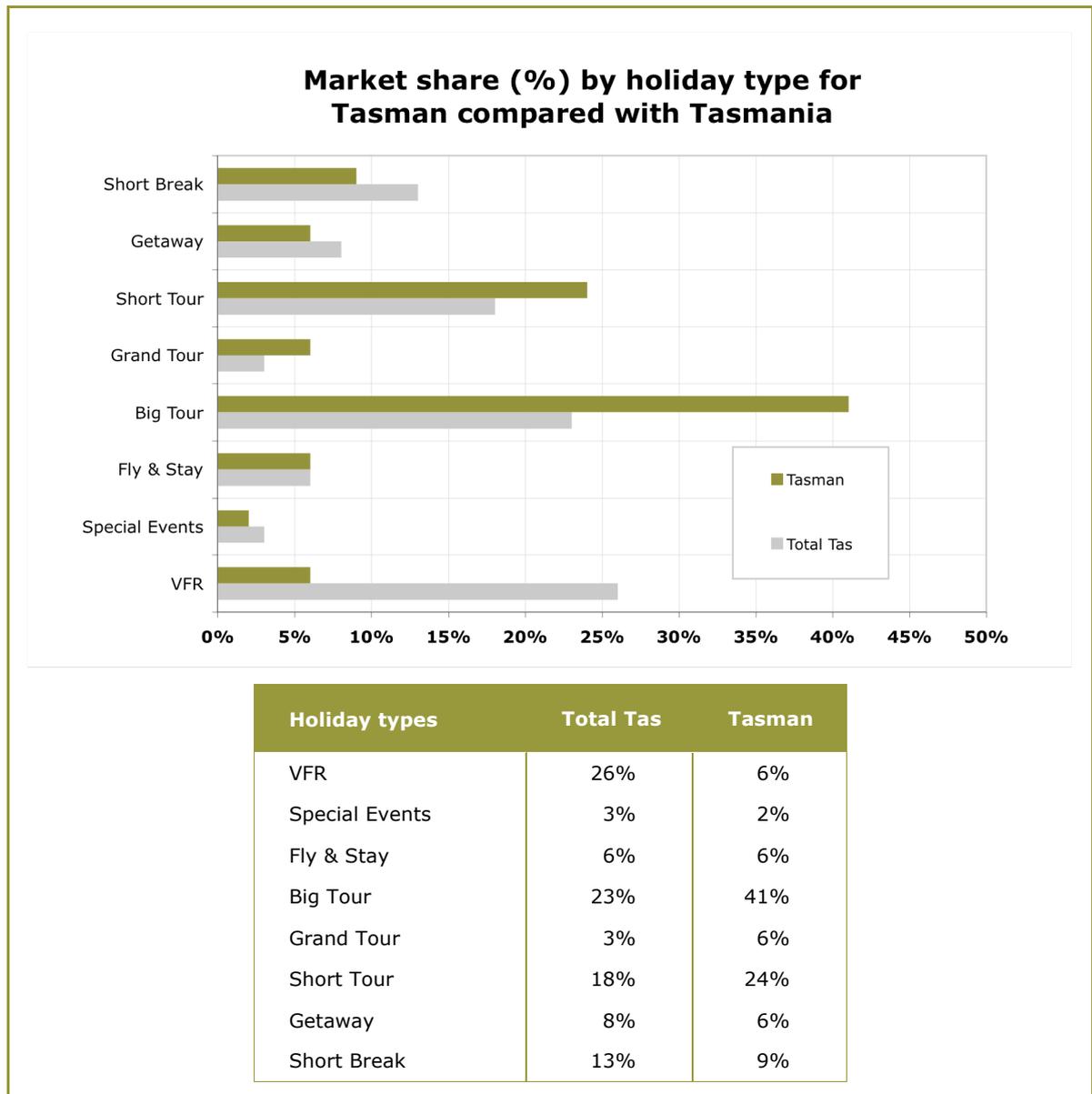
Year ending June	Leisure visitors to Tasmania	Total share to PAHS	% visitors PAHS
2006	633,500	223,300	38.2%
2007	608,900	231,700	41.1%
2008	648,600	243,100	40.6%
2009	674,900	250,600	39.8%
2010	653,900	230,000	38.9%

Source: TVS and PAHS

Note: These figures do not include intrastate visitors

ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

Table 1.9 Comparative market share by holiday type for Tasmania and the Tasman



Source: TVS

ATTACHMENT 1.1: Tasman/Tasmania visitor data cont.

Intrastate travel

Table 1.10 Intrastate market: key data ye June 2010

- Tasmanians undertook 1000,000 trips down just 1% on the previous year
- Overnight holiday trips (-1%); VFR (+11%); business (-16%)
- Day trips increased by 7% to 4.5m.
- Total overnight spend remained steady at \$285m
- Total day travel spend up 5% to \$439m.

Source: Tourism Tasmania, Tasmanian Tourism Snapshot