



CENTRAL HIGHLANDS

Destination Action Plan 2016–2019

November 2016



Acknowledgments

The development of the Central Highlands Destination Action Plan (DAP) has been facilitated by Destination Southern Tasmania (DST) with the support of the Department of State Growth.

The process brought together representatives from stakeholder groups that benefit from the visitor economy; local government, state government agencies, industry and the community to develop a Plan. This Plan seeks to identify the challenges and opportunities facing the Central Highlands region and to establish achievable affordable priorities that if delivered would increase the destination's competitiveness.

This is an action focused plan that identifies specific priorities and actions that if cooperatively acted on by stakeholders, will contribute to the achievement of agreed objectives in the short term (rolling three years). As such the Plan does not purport to be a comprehensive strategic plan but is deliberately focused on identifying the key challenges and opportunities facing the destination and to establish achievable and affordable priorities and actions to address them. It is a 'bottom-up' Plan driven by the industry, in cooperation with local government and the community, while being cognisant of State and regional strategic plans and programs.

DST would like to thank all who participated in the plan development process:

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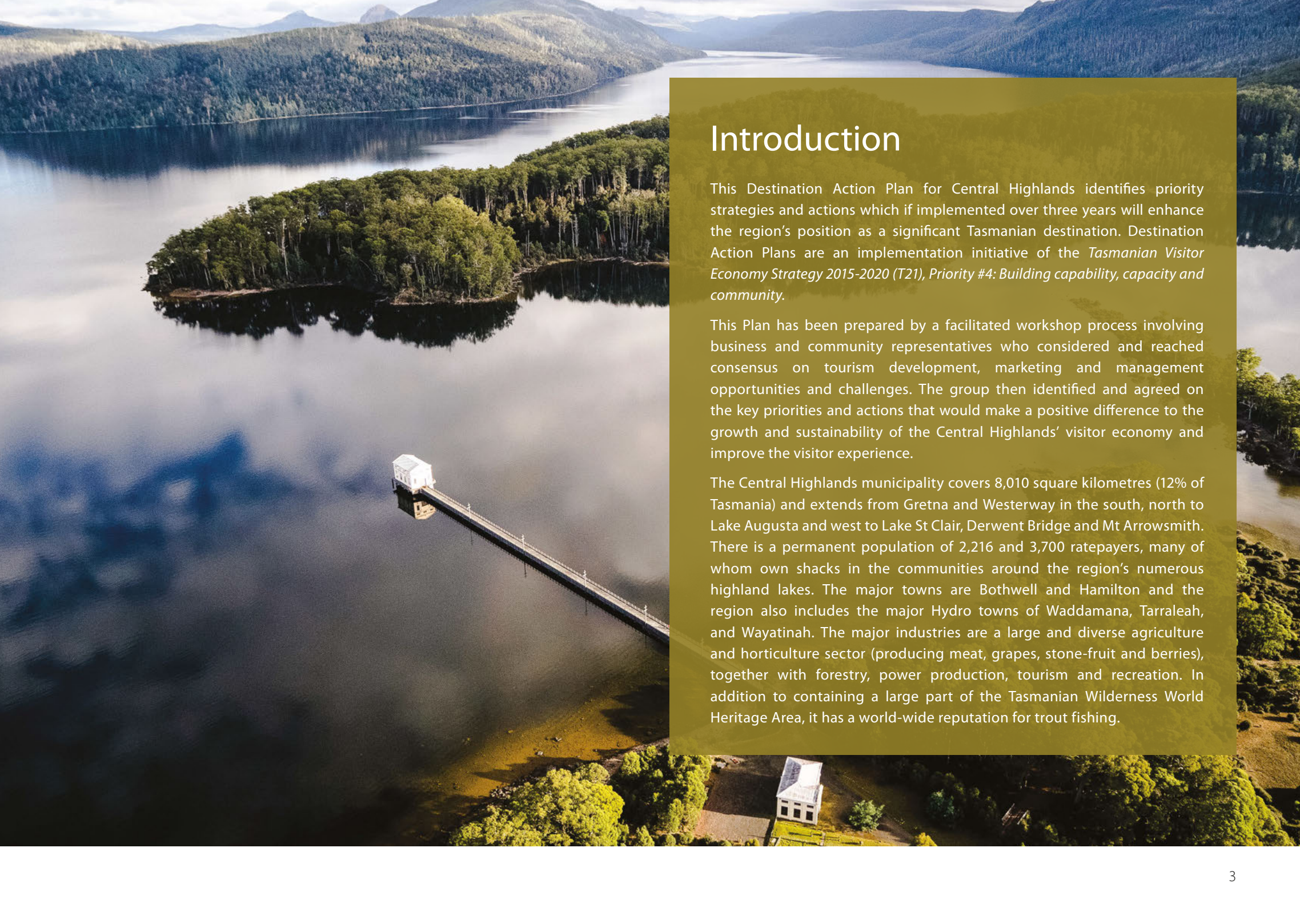
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Images used within this document are courtesy of Tourism Tasmania, Ratho Farm, Thousand Lakes Lodge, Blue Lake Lodge, Pumphouse Point, Westerway Raspberry Farm, Tarraleah Estate, The Possum Shed, Alice Hansen, Rob Burnett, Richard de Chazel, Stu Gibson, Annie Gattenby, Tony Hogg, Brendan Turriff, Bill Bachman, Joe Shemesh, Graham Freeman, Will Horan, Nick Osborne, Adam Gibson.



Introduction

This Destination Action Plan for Central Highlands identifies priority strategies and actions which if implemented over three years will enhance the region's position as a significant Tasmanian destination. Destination Action Plans are an implementation initiative of the *Tasmanian Visitor Economy Strategy 2015-2020 (T21)*, Priority #4: *Building capability, capacity and community*.

This Plan has been prepared by a facilitated workshop process involving business and community representatives who considered and reached consensus on tourism development, marketing and management opportunities and challenges. The group then identified and agreed on the key priorities and actions that would make a positive difference to the growth and sustainability of the Central Highlands' visitor economy and improve the visitor experience.

The Central Highlands municipality covers 8,010 square kilometres (12% of Tasmania) and extends from Gretna and Westerway in the south, north to Lake Augusta and west to Lake St Clair, Derwent Bridge and Mt Arrowsmith. There is a permanent population of 2,216 and 3,700 ratepayers, many of whom own shacks in the communities around the region's numerous highland lakes. The major towns are Bothwell and Hamilton and the region also includes the major Hydro towns of Waddamana, Tarraleah, and Wayatinah. The major industries are a large and diverse agriculture and horticulture sector (producing meat, grapes, stone-fruit and berries), together with forestry, power production, tourism and recreation. In addition to containing a large part of the Tasmanian Wilderness World Heritage Area, it has a world-wide reputation for trout fishing.

The visitor economy

Visitors to the Central Highlands region are substantial contributors to the local economy. Visitors include leisure tourists (intrastate, interstate and international), visitors to friends and relatives, business visitors, students and day trippers. Their expenditure is 'new money' contributed to the local economy which supports jobs, real estate value and the provision of services, facilities and activities in the community.

Interstate and international visitors

The Tasmanian Visitors survey (TVS) only collects data on visitors to Bothwell and Lake St Clair/Derwent Bridge. For the year ending June 2016:

Total visitation (day and overnight)

- Bothwell – 38,172 (about the same as the previous year but 20,795 just passed through)
- Lake St Clair/Derwent Bridge – 127,315 (up 11% on previous year but of these visitors 52,760 passed through rather than stopped and visited).

Total overnight visitation

- Bothwell – 4,636 stayed 8,630 nights (up 17%. Note: this figure is from a small sample size and should be treated with caution)
- Lake St Clair/Derwent Bridge – 26,917 stayed 45,387 nights (up 89% – presumably largely driven by Pumphouse Point).

Intrastate visitors

Day trips: 103,000 (up 23%. Note: 105,000 in 2014 then dropped to 83,000 in 2015)

Overnight visitors: 43,000 (up 8% compared to the previous year)

Nights: 99,000 (up 19% compared to the previous year).

Employment

The tourism industry in Southern Tasmania provides the most significant contribution to the State's tourism sector in terms of output, employment, wages and salaries and other economic indicators (Economic Impact Analysis in Southern Tasmania 2013):

- The tourism sector represents 7.1% of total employment in Southern Tasmania (approximately 6,800 jobs)
- Tourism in the south is estimated to generate \$973.4 million in economic output
- Major tourism related industries are accommodation and food services
- Tourism contributes \$1,849.5 million to the southern Tasmanian region, accounting for nearly 13,000 jobs.

Source: *Tasmanian Visitor Survey year ending June 2016, International Visitor Survey year ending June 2016, National Visitor Survey year ending June 2016, Economic Impact Analysis in Tasmania's South 2013, Remplan. Expenditure figures are calculated based on average expenditure per night in Tasmania. They are estimates only.*

Objectives

The common objectives for tourism are to increase the yield from visitors by increasing:

1. Visitor satisfaction
2. Visitor length of stay
3. Visitor expenditure
4. Visitor dispersal (geographically and seasonally)
5. Visitor numbers.

The primary objective of this Plan is to maximise the visitor experience and increase visitor satisfaction. This will in turn result in more visitors, increased dispersal of those visitors across the region, increased length of stay and visitor expenditure.



Our challenges

- Need for improved visitor facilities throughout the region, such as toilets, signage and visitor information (similar to those at Derwent Bridge)
- Lack of regional operator engagement and cooperation
- Lack of leadership, expertise and energy to drive the vision
- Need for coordinated regional marketing
- Self-regulation and variable standards of quality of visitor experiences
- Coordination between government agencies
- Dispersed nature of region, destination not easy to define
- Breaking Hobart monopoly (dispersal)
- Sustainability of existing businesses
- Conversion of day-trippers and drive-throughs to overnights
- Poor understanding of distribution system by some operators
- Communication breakdown between operators and community
- Need for more attractions, experiences and guided tours
- Prohibitive insurance requirements for adventure tourism
- Labour market, lack of qualified staff and training programs
- Seasonality
- Technology: reception, WiFi and ATMs, as well as capacity to cope with prolonged power outages
- Availability of fuel.

Our opportunities



Industry leadership and cooperation

- Facilitate better Communication, Connections, Communities, Cooperation, Conversions and Consequences
- Address logistical challenges of remote locations through cooperation and coordination between operators to make deliveries and industry services more efficient and timely
- Operator self-reliance; currently working with local government and regional tourism organisations but ultimately need to take responsibility to drive it ourselves
- Business and operator networking
- Engaging local operators to become a powerful voice for promoting the region
- Education integration, community support and engagement
- Converting day visitors to overnight visitors.

A recognised Central Highlands brand

- Develop an identity and brand which will generate positivity about the area
- Create an inventory of tourism assets (including experiences and stories) in the region with the help of the local community
- Develop a repository of these experiences and stories
- Utilise better interpretation techniques to expose the local stories, incorporating heritage and history
- Central location is an advantage for accessibility from all corners of the state.

Improved visitor experiences

- Better roads, toilets and information (Marlborough Highway)
- Hydro infrastructure at Waddamana – very central, has capacity to be a hub for hydro heritage and activities in all sub-regions
- Indigenous tourism assets around Great Lake and the Highlands – can be linked to coastal indigenous stories and other indigenous operators and experiences
- Events across seasons and regions that give life to the brand and embrace seasonality – Fagus, Highland and, Derwent Valley festivals; adventure; and family
- Better access to fishing, wildlife, walking and other adventure opportunities
- Agritourism: living heritage with multi-generational agricultural families
- Hire services for fishing, golf and other activities
- Directional and interpretation signage (agricultural interpretation, scenic/photo stops)
- Acquire and assess more visitor feedback and visitor satisfaction knowledge
- Contemporary integrated visitor information
- Integrated WiFi project between four Councils – Brighton, Southern Midlands, Central Highlands and Derwent Valley.



Success factors

DIAGNOSTIC RATING

Industry research has established that the following factors are present in successful destinations that are achieving the aforementioned objectives. The workshop participants considered these factors relative to the Central Highlands in reaching consensus on the priority strategies and actions. A focus on continuous improvement of all these factors will contribute to the competitive growth and sustainability of the visitor economy of Highlands.

Characteristics	Rating	Comments
1. Supportive communities which understand the value of tourism.	4.36	Opportunity to strengthen.
2. Strong regional organisations focused on their core role of regional marketing and development.	3.38	Ongoing communication and engagement through the development of operator cooperation.
3. Strong regional tourism organisation.	7.44	Use them!
4. Local government support.	6.20	Opportunity to build on this.
5. Strong, consistent and effective leadership by individuals or organisations.	4.10	Support leadership development.
6. Strategic planning for the region with economic, social, environmental and cultural objectives supported by local destination action plans.	5.0	Destination Action Plan in progress.
7. Consistent visitor service excellence.	3.69	Need to address and improve.
8. Research driven cooperative marketing.	3.29	Increase collaboration and communication.
9. A breadth and depth of tourism infrastructure, experiences and events matched to market demand.	4.80	Opportunity for continuous improvement.
10. Risk management plans in place.	4.44	Address visitor risk mitigation and recovery planning in local government risk management strategies.



Action Plan implementation

The following Action Plan outlines priorities and actions as a guide for stakeholders to collaboratively and cooperatively implement the Plan. To facilitate this, an Implementation Leadership Group (ILG) of representatives will be formed. While the Plan identifies primary organisational responsibilities and in many cases, joint responsibility, it is reasonable to expect that the ILG will consider and review this progressively. One key consideration will be the availability and securing of resources to progress the implementation of the Plan in a timely manner. It may also be appropriate and necessary to involve other organisations and to seek funding for specific projects.

The Plan does not commit any organisation to the actions proposed but is a guide to pursuing priorities and actions which will make a positive difference to the achievement of the tourism objectives noted above. Implementation should take note of the *Central Highlands Council Strategic Plan 2015 – 2024*.

The priority actions have been assigned a KPI priority rating as a guide. These ratings are:

- HIGH** Within the first year
- MEDIUM** Within one to two years
- LOW** Within three years

Progress of implementation of the Plan will be assessed annually by Destination Southern Tasmania (DST) in consultation with the ILG. This may result in a revision and updating of the Plan. Regardless, a new Plan will be prepared in three years.

The following organisations have been identified to have an important role to consider and progressively work together to implement the priority actions. This will include nominating representatives to form the core of an ILG.

- DAP ILG, Central Highlands Council (Highlands Tasmania Advisory Group), Highlands Progress Association, Destination Southern Tasmania, Tasmanian Parks and Wildlife and Hydro Tasmania. It is also noted that there may be opportunity for the Derwent Valley and Central Highlands to work together on some actions which are common to both DAPs.

It should be stated that the core role of the ILG is not to implement actions, it is to manage the implementation process, monitor progress and ensure that KPIs are reviewed annually. It is important that the ILG keeps all of these groups informed of progress and engaged as required.



Summary of priorities

1. Implementation leadership and industry cooperation.
2. Develop and consistently promote a unique positioning and brand identity for the Central Highlands.
3. Improve visitor experiences.
4. Infrastructure and product development.

It is important that the ILG reviews the priorities as a matter of priority to ensure that they are achievable before wider circulation of the Plan. Only priorities regarded as High have been allocated responsible organisations unless that responsibility is obvious.



PRIORITY 1

Implementation leadership and industry cooperation

Actions	Organisations	Priorities
1. Confirm Destination Action Plan ILG.	ILG, CHC	Agreed
2. Consider a formal launch of the DAP to engage and motivate industry stakeholders and the community.	ILG, CHC	High
3. The group to identify 2-3 actions for immediate action over the first year and apply sound project management process with support from DST.	ILG, CHC	High
4. Develop and implement a communications plan to keep all stakeholders informed of progress and to maintain engagement and momentum.	ILG, CHC	High
5. Encourage Central Highlands Council to endorse the plan and to actively participate in the ILG.	ILG, CHC	High
6. Consider progressing the DAP in consultation with industry in Derwent Valley.	ILG, CHC	High
7. Find effective ways of increasing operator cooperation and engagement to facilitate implementation of actions in other priorities, whilst also recognising the breadth of the region and relative difficulties of physically coming together. Consider an operator facing Facebook page or some other digital mechanism to aid communication, knowledge and resource sharing and cooperation.	ILG, CHC	High
8. Encourage and support existing operators to renew and develop their visitor experiences, products and services. Add support to those making investments by communicating to the industry, community and the market.	DST	Medium
9. Consider the establishment of a 'business to business' peer mentoring program to collectively raise standards and contribute to seamless visitor service excellence.	DST, ILG	Medium



PRIORITY 2

Develop and consistently promote a unique Central Highlands positioning and brand identity

Actions

1. In consultation with key stakeholders, undertake a destination brand and positioning process and develop a brand style guide. Give consideration to existing brand messages, stories, activities and signature experiences that can determine a unique sense of place. Consider:
 - a. The Highland Lakes, trout fishing and World Heritage Area
 - b. Hydro and farming heritage and experience
 - c. Opportunities for adventure, including fishing, walking and more adventurous pursuits
 - d. Collaboration with the Derwent Valley
 - e. Consistency and relevance to the southern Tasmanian brand and positioning
 - f. Indigenous culture and heritage.
2. Undertake a comprehensive industry and community engagement and communication process to build ownership of the brand and positioning.
3. Ensure that the positioning features consistently in operator, destination, regional and Tasmanian websites including signature images and the agreed narrative.
4. Consider including signature images on roadside signs at all key entry points to the Central Highlands, including at the airports and ferry terminals.

Organisations

Priorities

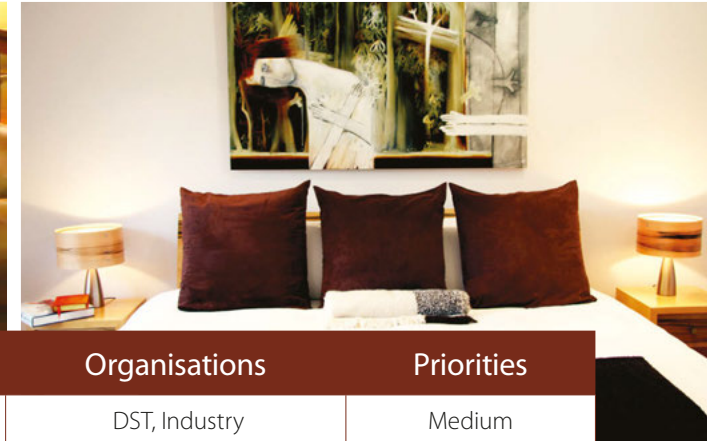
Build on industry workshop that has been conducted by DST and work undertaken by Central Highlands Council DST will continue to facilitate this process.	High
DST, ILG, CHC	Medium
ILG, Industry	Medium
ILG, DSG	Medium/High



PRIORITY 3

Improve visitor experience and services

Actions	Organisations	Priorities
1. Undertake an audit of visitor facilities, amenities and services to identify opportunities for maintenance renewal, service gaps and further development, relative to contemporary competitor destinations and visitor expectations.	CHC	Medium
2. Support and provide opportunities for continuous improvement and encourage a lift of standards across the region. E.g. encourage participation in the THA's customer engagement training program.	Industry	Medium
3. Review ways of communicating and celebrating the Hydro heritage and infrastructure experience to industry stakeholders.	HEC, Hydro Power Trail	Underway
4. Explore ways of better integrating the trout fishing experience into main stream visitor experiences.	ILG, Industry	Medium
5. Investigate and encourage integration of the indigenous heritage experience in interpretation activities in conjunction with the aboriginal community.	ILG, Industry	Medium
6. Position the Central Highlands to be able to participate in the Tasmanian Visitor Engagement project as opportunities arise, and apply to service delivery in the Highlands as a best practice destination.	ILG, DST, DSG	High
7. Review the access to visitor information, including digital sources and explore ways of leveraging off the 190.000 visitors to Mt Field.	Parks and Wildlife Service	Medium/High



PRIORITY 4 Infrastructure and product development

Actions

	Organisations	Priorities
1. Establish an industry development program focussed on encouraging innovation such as operator visits to other destinations and attractions to benchmark the Highlands experience and to explore opportunities for development to better meet visitor expectations and optimise new opportunities.	DST, Industry	Medium
2. Further develop signage (agriculture, scenic photo stops, directional) as per Derwent Bridge	DST, ILG, DSG	Medium/High
3. With the support of DST, continue to advocate for the improvement of public infrastructure in the region such as roads, walking tracks, toilets and directional signage.	DST, ILG, CHC	Ongoing