

DRAFT TOURISM PLAN

2022-2027

SUPPORT. GROW. DELIVER



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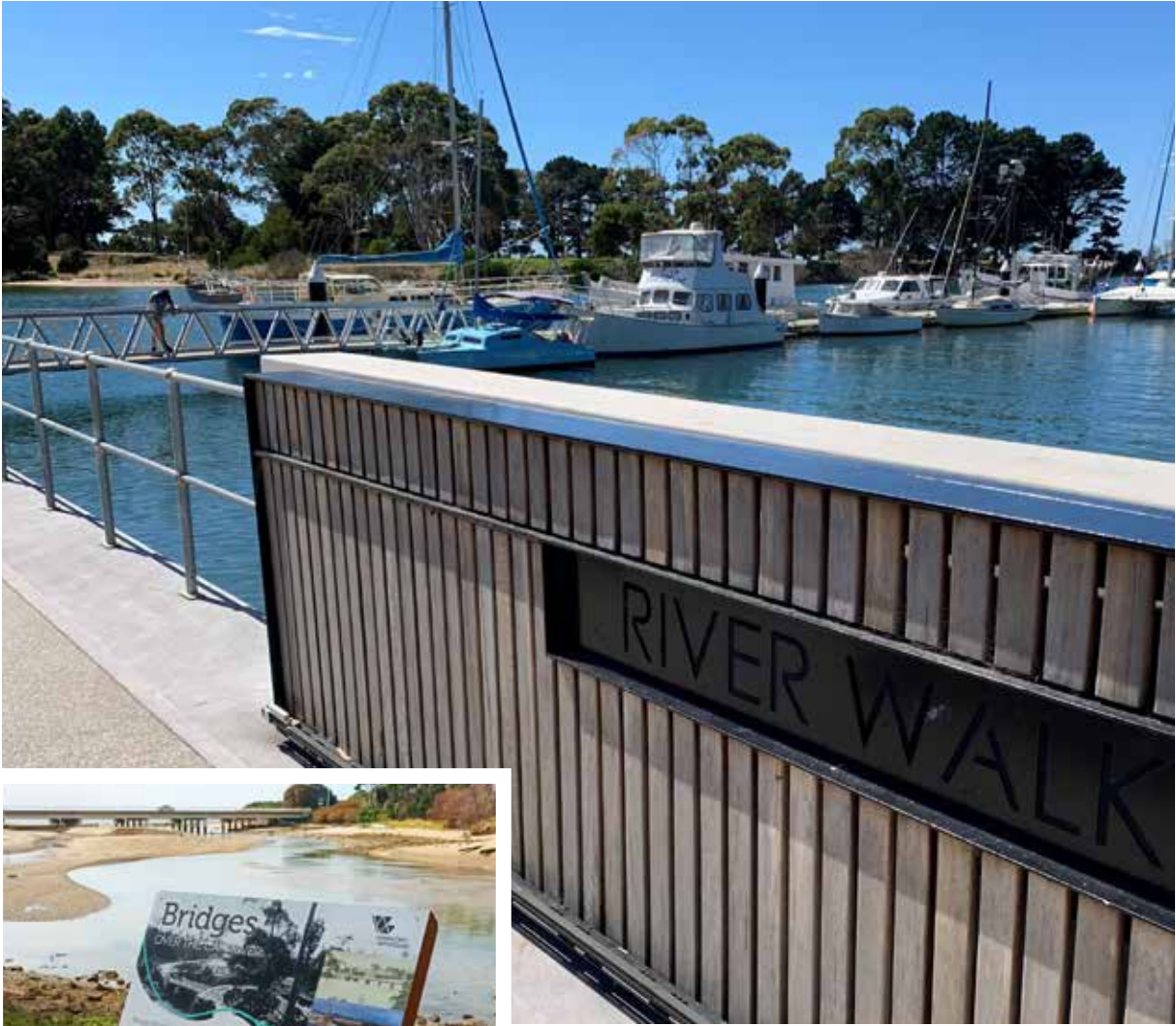
TOURISM PLAN 2022-27

Priorities and recommendations

Unlike areas that are famous for only one thing, Wynyard and Surrounds has many striking features. From the geological formations, to the kaleidoscopic land, to the distinct towns, small villages and unique communities, no two features are alike.

The unique experiences in the area offer an abundance of possibilities and opportunities for businesses, locals and tourists to craft their own unique story.

(Waratah Wynyard Council
Marketing Strategy 2017)





EXECUTIVE SUMMARY

The Waratah-Wynyard Council Tourism Plan 2022-2027 celebrates achievements from the past decade of tourism planning and provides a summary of the key strategic priorities for the next five years.

The plan outlines roles and responsibilities of local government within the strategic framework of Tasmanian tourism. Priorities and recommendations are built around these key roles including the provision of public infrastructure, encouraging economic development, provision of visitor servicing, local marketing and the support of local events.

Importantly, the plan also aligns with the strategic priorities of the State and Regional tourism bodies, as well as Council's existing strategic plans.

The priorities focus on the unique selling points of Wynyard and Surrounds as a destination and build demand through the pursuit of new 'hero' products and a cluster of experiences that will drive year-round demand in a crowded marketplace.

The plan also briefly describes some global, national, state and local trends in order to create some context for the recommendations.

The plan delivers recommendations that are achievable in a timeframe that could be considered conservative, however considering the current context of global uncertainty longer-term planning would be somewhat speculative.



HISTORY

HIGHLIGHTS FROM THE WARATAH-WYNYARD COUNCIL TOURISM PLAN (2011-2020)

Waratah-Wynyard Council's Tourism Plan (2011-2020) focussed heavily on establishing a planning and structural framework from which the Council could build industry connections and set a strategic direction for what was at the time, an industry very much in its infancy not only locally but throughout the region as a whole.

A current desktop analysis of the existing tourism products/businesses identified in the 2011-20 report shows that only approximately 40% are still operating in 2022. The majority of those still operating are larger businesses such as car hire companies, golf clubs, hotels, motels and caravan parks. Very few of the café's, restaurants, guest houses and tour companies still exist.

This reflects the nature of the local industry, which in large part is made up of small, family-run operations. These are, by nature, more transient than the larger corporate operations and also the volatility of the industry as a whole over the past few years in particular.

Key outcomes of the 2011-2020 plan include increased resourcing for Council's tourism and events and the development of a destination marketing strategy (including rebranding) in 2017.

Council has also continued to invest in infrastructure to support the industry such as the Wynyard Waterfront Precinct and walking tracks including Philosopher Falls, as well as maintaining the Waratah visitor attractions including the Athenaeum Hall, Stamper Mill and Caravan Park.

Visitor servicing was also a highlight, with the Wonders of Wynyard Exhibition and Visitor Information Centre building a national reputation for excellence culminating in a Gold medal at the 2021 Australian Tourism Awards.

Community events and festivals were also noted as a key driver for increasing tourism demand for the destination. The Tulip Festival has evolved into an event of cultural significance, attracting over 15,000 people to Wynyard for the one-day event in 2020. The event has also won State and National awards and attracted State Government funding for future expansion.

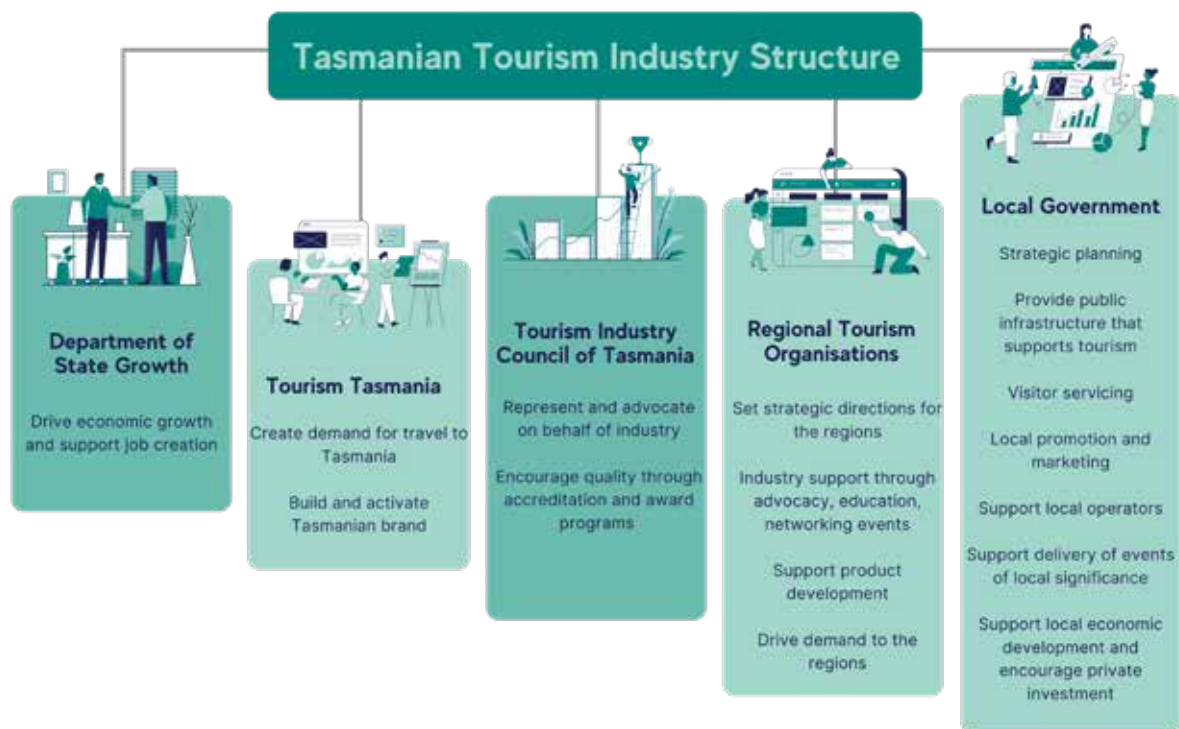
These key outcomes illustrate that Waratah-Wynyard does indeed have the potential to play in the tourism space and compete with the best for visitor experiences.

Directives in this new plan will seek to build on what we already do well, focus on what is special about the area and continue to embrace opportunities. This will encourage new investment in unique and innovative offerings that will play to our strengths, satisfy customer needs and create year-round demand.

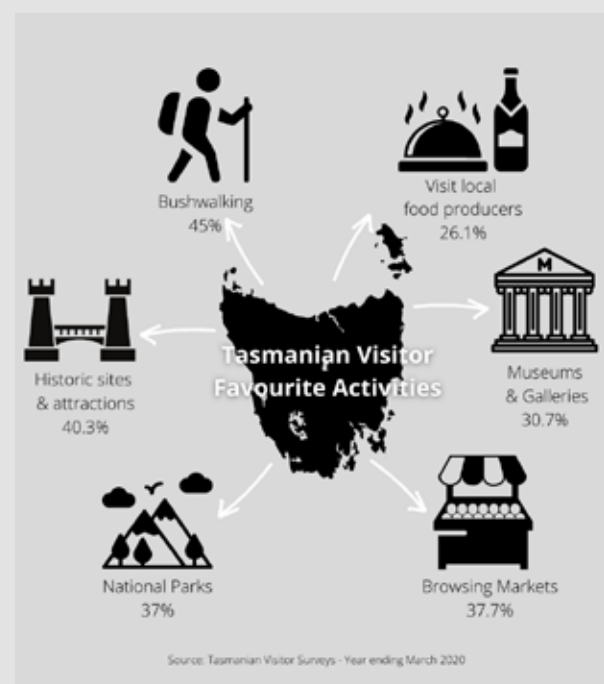
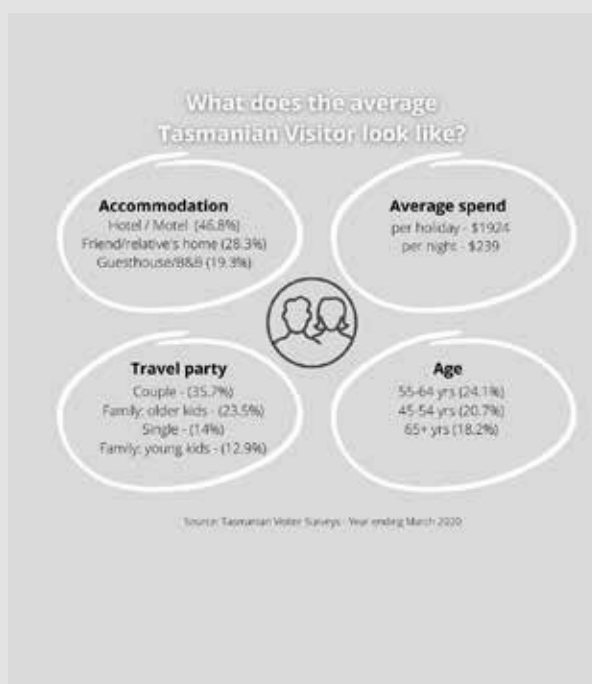


TASMANIAN TOURISM INDUSTRY

STRATEGIC PLANNING CONTEXT



TASMANIAN VISITOR PROFILES



STRATEGIC PLANS GUIDING TOURISM IN TASMANIA

TOURISM TASMANIA

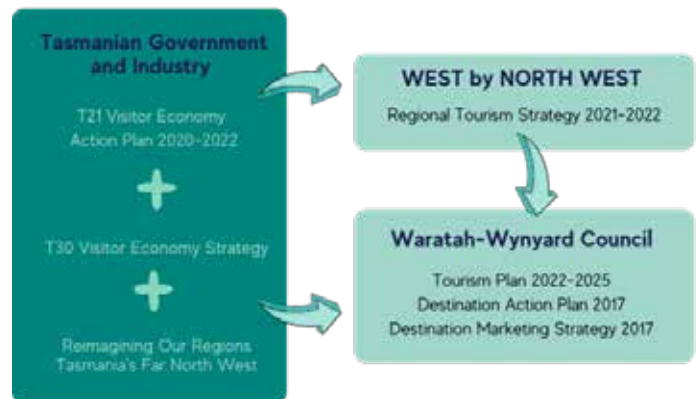
T21 Visitor Economy Action Plan (2020-2022): Focusses on short-term recovery and being industry ready to capitalise on the increased demand post-COVID*.

Reimagining Our Regions: Focusses on strategic investment opportunities to increase demand and drive visitation to the far North-West.

*T30 Visitor Economy Strategy: In development at the time of writing.

WEST BY NORTH WEST

WxNW Regional Tourism Strategy: Outlines a regional focus on four strategic pillars: Advocacy, Industry Support, Product Development and Marketing.



HOW DO THESE PLANS RELATE TO COUNCIL'S PRIORITIES?

Reimagining Our Regions

- Table Cape: Loo with a View & lookout upgrade

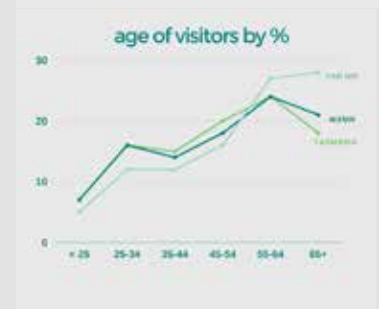
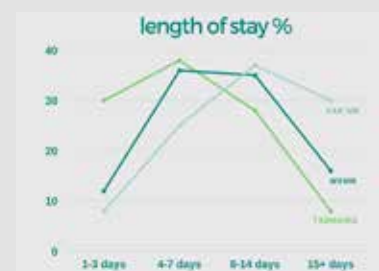
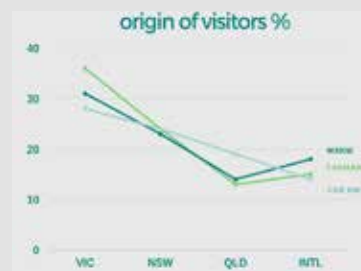
Destination Action Plan

- ANZAC Park destination playground
- Table Cape amenities

AVERAGE TASMANIAN VISITOR V'S NW AND FAR NW

Compared to the average Tasmanian tourist, visitors to the North-West and Far North-West are:

- More likely to stay longer;
- More likely to come from regional areas of Australia;
- Less likely to be from overseas;
- 4 times more likely to arrive on the Spirit of Tasmania;
- More likely to be aged over 55.



TASMANIAN REGIONAL TOURISM CONTEXT

Visitors spend money throughout the state, regardless of their purpose for coming here. This benefits the Tasmanian economy in many ways: through the increased demand for services; goods; capital investment; and labour.

This in turn benefits many local industry sectors, including direct tourism services.

More visitors spending in our communities stimulates the creation of new businesses; they sustain existing businesses; create jobs and population growth; and support cultural endeavours, the arts and creative industries.

(Source: T21 Tourism Strategy: Tourism Tasmania)

“ Whilst Tasmania saw a Large increase in demand between 2010-2018 (45%) , this was largely made up of increased visitation to Hobart City and Launceston. With very few exceptions, regional centres generally experienced declining visitation over that time of between 2-30%. (TVS) ”

The challenge for the regions of Tasmania is to encourage more people to disperse further into the corners of the state, thus spreading the benefit that tourists bring outside the larger metropolitan centres. Recognising regional dispersal as a key measure of success for Tasmania's visitor economy, Tourism Tasmania commissioned the 'Reimagining our Regions' report as part of the T21 Tasmanian Visitor Economy Strategy (2015-2020). The report identified clear disparity between total visitation and visitation to the north west, with the gap even more pronounced when looking at the far north west (defined as west of Wynyard).

The report outlined some enablers for growth, emerging points of difference and priority concepts for product development to drive demand. One of those key projects directly relates to the Waratah-Wynyard municipality, with "Improved experiences at Table Cape: 'Loo With A View' and boutique accommodation" identified as a key strategies to create a 'hero' experiences to drive demand to the Far North-West.



WYNYARD AND SURROUNDS VISITOR STATISTICS

WYNYARD AND SURROUNDS VISITOR RECOVERY RATE

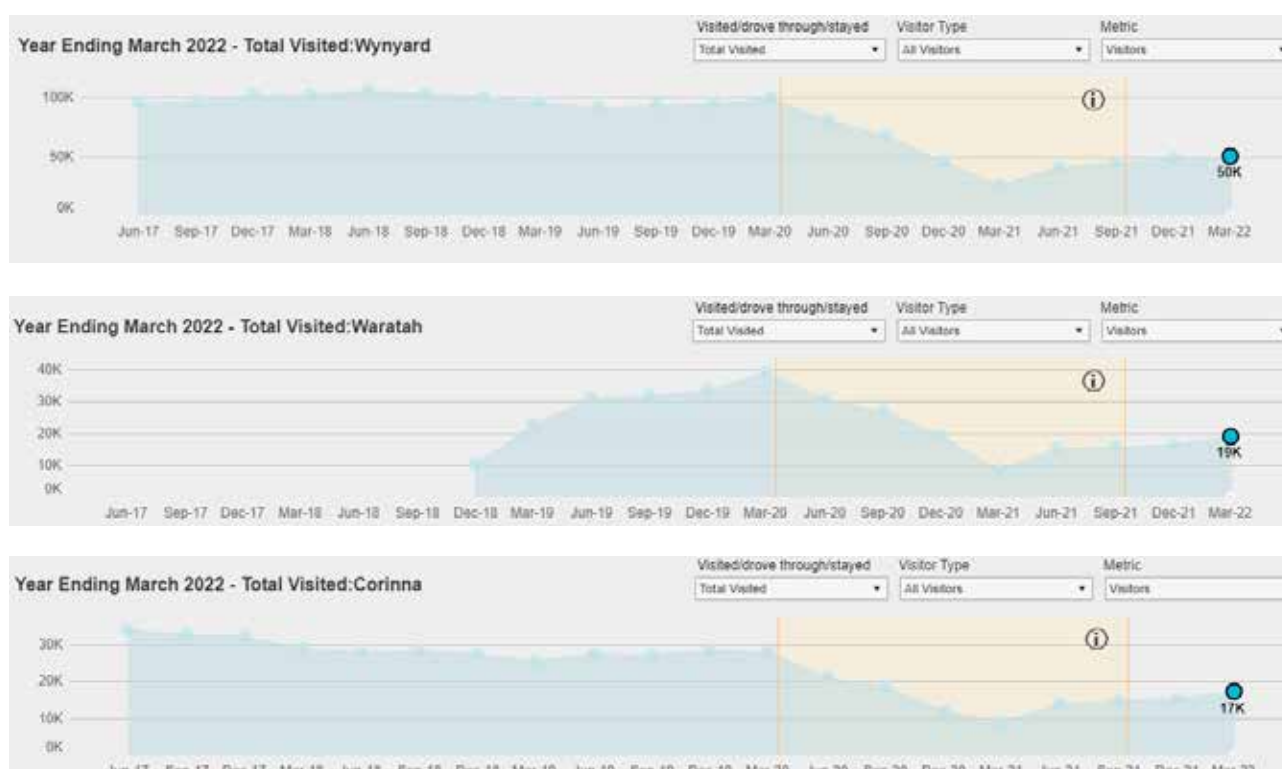
The graphs below show the total number of people who indicated that they visited Wynyard, Waratah and Corinna since January 2017* according to figures gathered in the Tasmanian Visitor Survey.

The statistics show a reasonably consistent visitation trend until March 2020, when numbers dropped by as much as 75% at the height of COVID-19 border closures and disruptions. The recovery since then has been slow, with Wynyard back at approximately 50% of pre-COVID numbers and the outer regions recovering even more slowly.

These figures compare less favourably than figures relating to the overall visitation to Tasmania, which is sitting at 66% of pre-COVID figures as at March 2022. Given the story that the graph on the previous page tells about the historical disparity between urban and regional travel in Tasmania, this is not an unexpected outcome. Traditionally Hobart and Launceston have seen the lion's share of total visitation to the state, with the regions lagging behind significantly, so it stands to reason regional recovery will also lag behind.

Tourism Tasmania data does show, however, that visitor nights and visitor spend are recovering at a faster pace than overall numbers, and this trend seems to be replicated for Wynyard and Surrounds with 2021/22 visitor numbers at the Wonders of Wynyard Exhibition and Visitor Information Centre down 66% on 2018/19 year, with income down just 33% for the same period.

It is too soon to speculate whether this trend of fewer, higher value visitors will continue into the future, or whether the changing economic environment will see the return of the more value-conscious traveller.



(*Waratah was added to the Tasmanian Visitor Survey as a destination in December 2018)



GLOBAL TOURISM TRENDS

There have been many rapid changes to the global tourism industry over the past two decades. It is difficult to compare long-term trends and statistics given the fundamental framework within which they existed previously is so profoundly different to the industry environment today.

Consider international travel demand as an example. Accessibility and affordability have made world travel within reach of the average consumer, exposing them to experiences that set the benchmark for future travel and set expectations for a higher level of visitor experience. Destinations are no longer competing locally or nationally, but on an international scale.

The advent of disruptive technologies and new industries such as the sharing economy have also fundamentally changed the tourism industry.

The rise in choice and popularity of social media platforms such as Youtube, Instagram, website blogs, Facebook, and Snapchat enable consumers to share content instantly and disseminate to wide and often

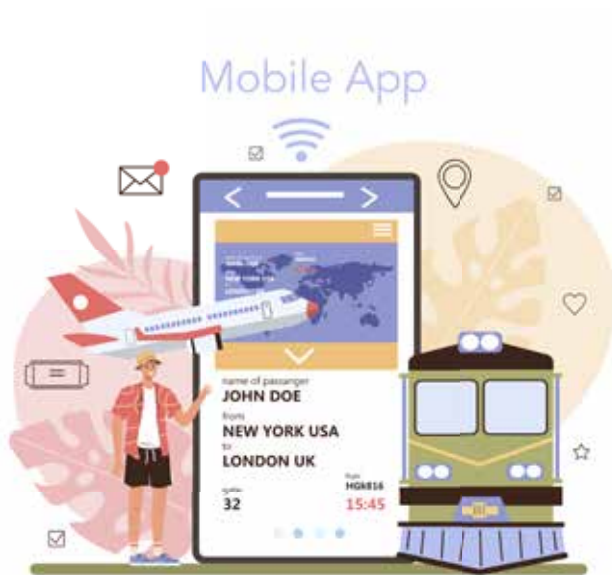
well targeted audiences at the touch of a button.

Review sites such as Trip Advisor, Google and Wikicamps provide travellers uncensored opinions on the quality of the experience, and the general availability of information across the numerous digital platforms provide consumers with unlimited opportunity to research, plan and share holiday experiences.

Whilst these advances can provide both the consumer and the tourism operator with positive opportunities, they also create some challenges including confusion and frustration for the consumer trying to plan in a crowded marketplace that has the potential to overwhelm them.

The challenge for industry players is to find a way to stand out: to target consumers effectively with marketing and to ensure positive visitor experiences for those that they do capture, so they reap the benefit from the 'new age' digital 'word of mouth' advertising.

The way we plan and experience travel has changed exponentially over the past two decades



The shift to a digital world has created an environment where booking platforms have fundamentally changed the way travellers plan and experience holidays. Airlines and accommodation are increasingly researched and booked by the consumer prior to commencing travel.

This has led to a boom in platforms such as Air BnB, Youcamp, Uber, Rideshare and the numerous 'food on demand' services. These are all examples of emerging economies that lure customers away from the traditional hospitality, accommodation and transport options. The entertainment industry and tourist attractions are likely to experience similar disruptions as technologies such as augmented reality and virtual reality emerge as the gold standard for visitor experiences.

The challenge for Tasmania has been to build and maintain a reputation as a destination of choice in this changing environment. Tasmania has strong competition from its neighbour New Zealand, with its well established reputation as a leader in the nature and adventure-based tourism experiences.

In recent years, Tourism Tasmania has established a strong demand for Tasmania's tourism brand, positioning the state as a leader in nature-based tourism and bespoke, authentic experiences that allow consumers to connect meaningfully with people and place.

The challenge for the regions in Tasmania, including Waratah-Wynyard, is to attract a fair proportion of the 1.2 million (pre-COVID) visitors to the state by offering something unique that tourists are both seeking from a holiday and are unable to experience elsewhere.

POST-PANDEMIC TOURISM

Since March 2020, COVID has had a profoundly negative impact on the world-wide tourism industry. As border closures and travel restrictions ease, the travel landscape will undoubtedly change further in the future. Some emerging themes for post-COVID travel may provide indications for the direction future trends might take, at least in the short-term.

SAFETY IN SMALL NUMBERS

Research is indicating travellers are looking for increased security, with travel uncertainty and the threat of cancellations, disruptions to travel plans and loss of deposits leading to bookings being made with much shorter lead times. Travellers are also looking for destinations that offer a greater emphasis on personal hygiene and safety.

Early 2022 indications are that consumers are returning to travel, however they are looking for smaller scale experiences. For at least the short-term, there will be more emphasis on family/small group travel where consumers have more control over their interactions with others outside their travel party.

GLOBAL CONCERNS

There are also clear indications that global uncertainty and rising prices are likely to have an impact on the post-COVID recovery rate for global tourism, and will curb the demand for large-scale international holidays, at least in near term.

Research on sentiment for domestic travel shows that while the desire for a domestic holiday is rising slightly, financial barriers have overtaken concern over contracting COVID as the biggest barrier to travel (42% compared to 26%). Indications are that domestic travel will take 6-12 months to recover.

CARAVAN AND CAMPING

As at June 2019, there has been a 28.1% increase over the previous five years in the number of caravans in Australia, with a similar increase in the number of campervans.¹

Young to midlife couples with no children have overtaken the 'grey nomads' and families as the largest sector of users. These trends bode well for Tasmania as a preferred touring destination, and for regional Tasmania in particular as caravaners are more likely to travel and spend money in regional areas.¹

Since the pandemic, this industry has seen a further boom in popularity, as travellers look for the relative safety and freedom of the great outdoors. Some recreational vehicle retailers have reported sales increases of up to 80% since July 2020.

GETTING BACK TO BASICS

Nature-based tourism, eco-tourism and sustainable tourism are all emerging trends that play to the strengths of the Tasmanian brand.

Tasmania's natural environment has always been our competitive advantage, however as the post-COVID traveller seeks to escape their urban confines to de-stress and re-engage with nature (and the simple things in life, like great food and wine), connecting with people and place have become key travel motivators.

* Tourism Australia March 2022 Consumer Sentiment report

¹ Caravan Industry Association of Australia Data Report :BDO 2019

The pandemic has increased the desirability of nature-based experiences and attractions, self-drive trips, and appeal of Tasmania's food, wine and beverages.

CRUISING

The cruise market in Tasmania was rising rapidly prior to the pandemic decimating the industry. In the 2019-20 season, cruise nights in Tasmania had reached almost 200, compared to an average of 60 per year between 2012-2015. With the Australian government removing the ban on cruise ships in April 2022, early indications are that there is likely to be a strong surge in demand in the coming season.

Tourism Tasmanian recently commissioned a report by KPMG that examines the value proposition of the cruise market for Tasmania. The report outlines the benefits and challenges of the market, in particular for the areas close to the main ports (including Burnie), and examines several scenarios for consideration as the State develops a future strategic direction that considers the triple bottom line for the sector.

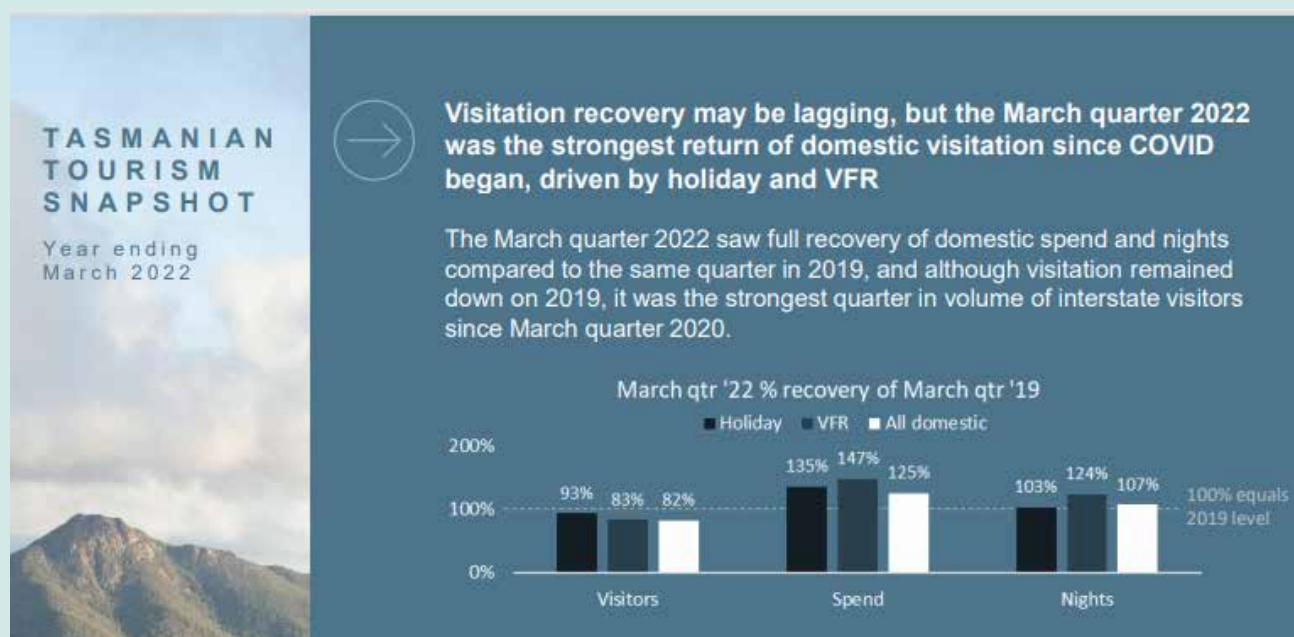
With Wynyard a previous beneficiary of some day trips from cruise ships berthing in Burnie, future state-led strategic decisions in this space are also likely to have an impact on Wynyard and surrounds.

TASMANIA WELL PLACED TO CATER TO EMERGING TRENDS

Tasmania is well-placed to cater for the post-COVID traveller. It's natural landscapes and wildlife are the top influences for holiday visitors to choose the state. The appeal of Tasmania's wilderness and wildlife grew from 60% to 65% between 2019-21, as people sought out more open-space places in response to the confinement of the pandemic, and perhaps a cautiousness of crowds.

The second greatest influence to travel to Tasmania, 'to self-drive around' the state, along with a desire to experience the state's food, wine and beverages (third place) also sees Tasmania in a position to capitalise on the post-COVID 'cautious traveller' resurgence*.

Recent research (below) shows that although Tasmanian visitation rates are still well below pre-COVID numbers, visitor spend and visitor nights are outpacing 2019 levels in the March 2022 quarter.



WYNYARD AND SURROUNDS DESTINATION BRAND

BACKGROUND

In 2017 Waratah-Wynyard Council undertook a full rebranding process, both at a corporate level and for Wynyard and Surrounds as a destination. The purpose was to establish a strong and relevant strategic narrative and brand identity that would:

- Revitalise the Waratah-Wynyard brand, generating excitement for the area both internally and externally.
- Celebrate the key strengths of the area as a unified whole.
- Have a real point of difference from other areas in Tasmania, Australia and the world.
- Attract new visitors by putting the area on the map and giving tourists more reasons to visit, stay longer and spend more.
- Grow existing businesses and draw new businesses that add value to the location and community.
- Retain existing residents, attract new residents and entice residents who have left the area to come back.
- Create a unique experience, lifestyle and a visual identity (e.g. signage) to be proud of.

MARKETING THEMES

ECO ADVENTURE	ARTIST FOOTPATH	CULTURE DIVE	SECRET NATURE
<p>Overview: Seeking outdoor activities including hiking, cycling and eco trails.</p> <p>Objective: Work up a sweat whilst experiencing the beauty of the region</p>	<p>Overview: Browsing in the local shops, seeing art galleries, visiting markets and tasting local produce.</p> <p>Objective: Relax and browse the region at your own pace</p>	<p>Overview: Travelling the region to learn about our rich history, taste our food, watch our sports teams, see live music, and get involved with our local artists.</p> <p>Objective: Get a hands on experience with the locals in our area.</p>	<p>Overview: Passively enjoying the hidden gems of our geology, flora and fauna of the area. Maybe include fishing and light walking.</p> <p>Objective: See nature without getting your feet dirty.</p>

SEASONAL MARKETING STRATEGY





BRAND POSITIONING

DIVERSITY IN
ABUNDANCE





Sitting near the edge of the world, Wynyard and Surrounds is a patchwork of diverse and exquisite beauty.

Born from unique geological formations, sculpted by the elements and decorated with mesmerising natural beauty, the area offers physically striking diversity.

Whether you're on a sea-sprayed cliff-top, wandering through vibrant fields of explosive colour, relaxing on a white beach or immersed in the prehistoric wilderness, you'll experience breathtaking moments surrounded by rare, unspoiled beauty and unique experiences.

The magic of our area exceeds the natural environment. The seven communities of Waratah-Wynyard are each historically, geographically and culturally unique. From the idyllic beachside communities to the historic mining towns, all have their own story, quirky idiosyncrasies and individual community spirit. And with stores, cafes, museums, trails and festivals waiting to be explored, there are so many undiscovered treasures to be found.

Whilst the area benefits from the purity of isolation, we're a well-connected, creative and innovative community. With established amenities, transport, sporting and creative recreational opportunities on our doorsteps. The lifestyle has all the benefits of a modern suburb, without the hassles.

For those seeking a relaxing, remote lifestyle or an action packed adventure, this is a place of opportunity and optimism with endless possibilities for businesses, locals and tourists to craft their own unique story and weave the threads of their own unforgettable experiences.



*A patchwork of diverse
and exquisite beauty*



Wynyard and Surrounds

Strengths



- Excellent reputation for visitor servicing
- Strong brand well aligned with Tasmania's key target markets
- Tulip Festival
- Unique offerings: Tulips, Table Cape, Lighthouse tours, Lobster Ponds, distilleries and agritourism product, boutique accommodation.
- Local markets and produce
- Natural beauty

Weaknesses



- Limited 'hero' attractions
- Limited coordinated industry representation
- Accommodation is mostly small scale – limiting ability to attract and service demand from large-scale events
- Transient nature of the local industry
- Traditionally been seen as 'drive through' destination

Opportunities



- Capture the 'short break market' from Melbourne and Sydney – potential partnerships with Burnie/Wynyard airport carriers
- Drive demand through additional unique attractions
- Build event sector
- Geological Trail and associated infrastructure & attractions
- Development of attractions that encourage overnight stays

Threats



- Unknown return rate of interstate & overseas visitors
- Limited intra-state market
- Uncertainty of forward travel bookings
- Future pandemic related disruptions including border closures and density limits, particular for events
- Existing or new Tasmanian 'hero' attractions drawing demand away in a tight market
- Not being ready to meet changing market expectations and new market demands

TOURISM PLAN 2022-2027

PRIORITIES AND RECOMMENDATIONS

The recommendations made in this report are based on the solid foundation already built over the previous ten years and take into consideration the global, national and state trends that have already, or will likely impact the tourism industry in the foreseeable future.

This plan is intended to set the groundwork for the return to pre-COVID visitation demand, acknowledging the challenging environment that currently exists, and the level of speculation and guesswork required to predict what the future tourism might look like for Wynyard and Surrounds.

The rapidly changing nature of the industry, with digital disruptions, global uncertainty and changing consumer expectations, creates an environment of both constant challenges and endless opportunities for the industry as a whole. Given the current broad range of global uncertainties that are largely driven by external factors, a five year plan that focusses on supporting industry recovery (through the provision of vital infrastructure and creating demand through product development and marketing) is a sound strategic direction for Waratah-Wynyard Council at this time.



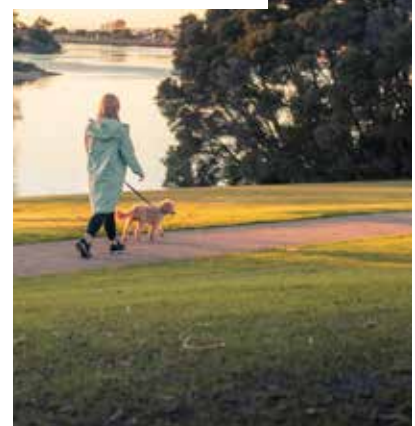
SUPPORT.



GROW.



DELIVER.





SUPPORT

PRIORITIES

Support a strong, cohesive brand aligned industry through strategic planning, maintaining strong industry connections at all levels and encouraging innovation and new product development.

RECOMMENDATIONS

- Support economic recovery through industry-specific grants programs for tourism and events.
- Support and promote innovative new industry offerings that align with our strategic priorities and encourage overnight stays to increase length of stay and spend in the region.
- Support significant tourism product enhancements outside our municipal area that have the potential to provide benefit to Waratah-Wynyard.
- Continue to participate in broader industry networking and planning opportunities.
- Support local community and sporting groups/organisations wishing to develop events that have the potential to increase visitation, particularly in winter and the shoulder seasons.



GROW

PRIORITIES

Grow supply of attractions and experiences to build a cohesive cluster of product that will appeal to new and existing target markets.

Grow market demand for Wynyard and Surrounds as a destination.

RECOMMENDATIONS

- Deliver signage, interpretation and marketing material for the Geological Trail.
 - Seek funding for a Philosopher Smith statue at Waratah.
 - Seek funding to progress the Loo with a View project at Table Cape.
 - Continue to look for opportunities to expand and refresh the offerings at Wonders of Wynyard.
 - Encourage strategic development that compliments and enhances the product offerings at/around Table Cape.
 - Enhance visitor experiences through the use of virtual or augmented reality.
 - Facilitate the continued delivery of Table Cape Lighthouse tours.
 - Conduct a feasibility study of the Oldina Gravity Area mountain bike concept should there be demonstrated community support for the project.
-
- Market the destination using the branded 'threads' theme, focussing on the key themes of accessible nature, markets and local produce, local culture and eco-adventure.
 - Produce a vibrant and brand aligned destination website.
 - Leverage the State Government projects such as Western Wilds, Drive Journeys, tourism Agri-business development and Tasting Trail expansion.
 - Review and update key destination marketing material.



DELIVER

PRIORITIES

Deliver infrastructure that supports tourism in and around our municipal area, including public toilets, playgrounds, pathways, signage, recreational spaces, waste facilities, sporting grounds and picnic areas.

Deliver walking tracks and trails that create linkages encouraging increased use of recreational spaces and ease of movement throughout the municipal area.

Deliver quality visitor services.

Deliver key events and promote an annual events calendar.

RECOMMENDATIONS

- Complete ANZAC Park destination playground at Somerset.
 - Deliver new signage for Council recreational facilities and public spaces.
 - Maintain tourism assets at Waratah including Caravan Park, Kenworthy Stamper Mill and Athenaeum Hall.
 - Deliver priority projects as identified in the Waratah Community Plan.
 - Continue to explore options for low cost public camping.
 - Progress the Boat Harbour Beach Master Plan.
 - Improve parking and road access at Table Cape lookout.
 - Track upgrades between Table Cape Lookout and Lighthouse, including seating, tables and signage.
-
- Progress the Burnie to Wynyard section of the Coastal Pathway.
 - Link pathway to geological sites including Doctors Rocks and Fossil Bluff, and develop supporting infrastructure and interpretation for the Geological Trail.
 - Complete options report for Inglis River walking track.
 - Investigate options for a multi-use pathway between Wynyard and Circular Head as a joint venture with Circular Head Council.
 - Explore options for new walking tracks at Waratah.
-
- Promote the Wonders of Wynyard, including the Ransley Veteran Car Collection, and build on it's existing reputation for excellence.
 - Provide static visitor information in the noticeboard at the Cam River Reserve, Somerset.
 - Investigate opportunities to enhance delivery of tourism services in Waratah.
-
- Continue to deliver the annual Tulip Festival and associated Spring events.
 - Maintain an event calendar on Council's website.



Photo credits:

Leanne Marshall: Cover; p.5 Fossil Bluff; p.21&24 Waratah Falls

Luke O'Brien: p.18 Rural fields; p.19 Philosopher Falls

Jess Bonde: p.21&22 Table Cape Lighthouse; p.21&26 Gutteridge Gardens

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