Central Coast Visitor Accommodation Strategy

Place Shaping
… it's in our nature

APRIL 2018

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PURPOSE

The purpose of the Central Coast Visitor Accommodation Strategy (the Strategy) is to underpin and provide a resource for a Central Coast Investment Prospectus (a Prospectus) of accommodation development opportunities as a vehicle to showcase the distinctiveness and opportunities in Central Coast to prospective developers and operators of related commercial activities.

INTRODUCTION

Suitable visitor accommodation provision is important to the success of the visitor economy. Visitors need appropriate places to stay if they are to visit Central Coast to see its attractions or carry out business. Accommodating visitors benefits the local economy, for example the hospitality and retail sectors then capturing the flow-on expenditure. This Strategy supports and encourages visitor accommodation provision in Central Coast, which includes hotels/motels, serviced apartments and alternative accommodation types.

According to regional supply and demand studies for North West Tasmania conducted by the Office of the Coordinator General (OCG), the number of nights visitors stay in the region will grow. It is forecasted that demand for visitor accommodation will often exceed supply, crowding out many visitors who cannot find an available room to suit their needs. Positively increasing demand for visitor related services and increasing hotel/motel room supply in a sustainable and balanced way will be important to ensure that we can benefit from short stay visitors and their expenditure in Central Coast.

Identification of potential development sites to include in an a 'Central Coast Investment Prospectus' provides for a proactive, long-term destination management approach that also plans for growth in visitor numbers. This will require Council to support landowners to bring potential sites to the development-ready stage where needed, for example rezoning and negotiating with the Parks and Wildlife Service and adjacent landowners. While market-driven, creating a Prospectus of development-ready sites could be an effective marketing tool to showcase opportunities in Central Coast to prospective tourism related developers.

The Strategy contributes to strengthening the shape of Central Coast. When planning for a vibrant place, it is important to focus on its shape, that is; planning, precincts, open spaces and the physical environment. The Strategy seeks to assist with sustainably enhancing these elements of shape in order to promote the distinctiveness of Central Coast to prospective tourism developers and commercial operators and build competitive advantage for the tourism industry.

In developing the Strategy, we acknowledge the valuable contribution of our Councillors, Council staff, community members, local groups, Government representatives, representative associations and peak bodies who brought their collective knowledge and experience to the following strategic conversations and activities:

- Central Coast Destination Action Plan Workshops (Cradle Coast Authority);
- The Tourism Accommodation Supply Analysis: North West Tasmania (OCG);
- Leven Canyon Review Working Group workshop; and
- Central Coast Accommodation Strategy project team meetings.

The Strategy is related to a number of local and regional strategies and plans. These include: the Central Coast Place Marketing Plan; Parks and Wildlife Dial Range Master Plan; Leven Canyon/Leven Valley Master Plan; Central Coast Cycling Strategy; and the Cradle Coast Authority Marketing Plan. While many of these documents are under review or development, they all seek to enhance our destinations and experiences in North West Tasmania and are considered as part of the Strategy's holistic viewpoint.

The Strategy is also part of the Council's Social Planning Framework (SPF). The SPF sets the direction and outcomes to achieve improved community outcomes and services. It comes from, and contributes to, the realisation of the Central Coast community's vision of 'living our potential' and 2014-2024 Strategic Plan that outlines the things that need to be done to achieve the preferred future. The three SPF priority areas that relate to the Strategy are: active, engaged and included.

The Strategy seeks to improve and create long-term resilience for our visitor economy and encourage more people to want to stay in the Central Coast destination and identify with our places and people. Increasing the competitive advantage of the destination in attracting visitors to our area can positively influence overnight stays and demand for related services. Investment in (and types of) accommodation and related commercial activities is connected to the visitor attractions in the area. A destination offering similar attractions will increase demand for specific types of accommodation and commercial products. Attractions, accommodation and motivation/market characteristics are inter-related, see Appendix 1. In order to positively influence demand for Central Coast tourism related infrastructure and services (including visitor accommodation) we need to work together to collectively build on and market our distinctly 'Great Natured Place'.

CENTRAL COAST INVESTMENT PROSPECTUS

Creating a Central Coast Investment Prospectus of development ready sites could be an effective marketing tool for a range of visitor accommodation development opportunities in Central Coast. Attracting new development and growing the range and capacity of available accommodation would improve the quality of place by creating a sense of momentum and create new opportunities for local economic development by capitalising on the visitor economy.

The identification of a range of potential accommodation development sites to create an investment prospectus for market testing is in process. Community engagement activities and analysis of our strengths suggest a Prospectus of development-ready sites is created to market to 3.5-4 star hotel developers. Alternative types of accommodation providers, should also be considered, see Appendix 1.

The Council has identified potential development sites within Ulverstone, especially connecting with the river and parklands. Potential accommodation development sites are also located in the Central Coast Hinterlands especially the area surrounding the Leven Canyon (colloquially known as the Leven Valley) and Dial Range including the area near and adjacent Dial Reserve. The Strategy will provide a resource and guide to engage with stakeholders to create a Prospectus.

Studies commissioned by the OCG found that around 70% of visitors to the North West Tasmania region currently stay in paid accommodation, with hotel/motels being the most popular type followed by rented house, flat, unit and serviced apartment. The OCG identified development opportunity to cater for visitors seeking 3.5-4 star hotel/motel

style visitor accommodation in the region. Over two thirds of visitor accommodation currently offered are in the 3-3.5 star range, whereas Cradle Mountain has a higher proportion of 4-4.5 star properties. Additionally, current visitor accommodation stock is ageing and often in need of improvement to meet market expectation. Central Coast is well positioned to attract accommodation development and address regional supply gaps.

Many hotels are now managed by operating companies under management agreements or sometimes franchises. This often means that when a new hotel is built, a developer will take the lead. They will seek to interest an operator who will (typically) take a 30 year operating agreement. The operator provides a degree of certainty that the premises will be managed professionally and will be operating under a strong brand. This enables the developer to secure funding. The implication of this way of doing things is that often, in trying to encourage development where there are gaps, the first task for a local authority is to identify a development opportunity and interest a developer, which the Council are currently investigating to include in a Prospectus. Attracting a hotel operator comes next.

CONTEXT

Tourism is a key lever to influence demand for visitor accommodation and associated commercial activities in Central Coast. Proactive government action is needed to coordinate, support and encourage accommodation delivery and the range of businesses involved in the visitor economy to realise the economic opportunities. The visitor economy is made up of many industry sectors including: visitor accommodation, hospitality, transport, cultural and recreational services, and retail. The economic benefits of visitors to Central Coast flows across these industry sectors and between regions. Increasing the number of visitors to our area can positively influence overnight stays in Central Coast, and demand for related commercial activities such as hospitality, the service sector and retail.

GLOBAL/NATIONAL LEVEL

People are increasingly mobile and travel across the globe seeking new experiences and holiday or business destinations. United Nations World Tourism Organisation (UNWTO) research on growth tourism markets indicate that visitors are searching for more genuine and authentic experiences, combined with outdoor activities to stimulate both mind and body. The global interest in the environment has also increased the desire of visitors to experience outdoor attractions, and the aspiration for a healthier lifestyle has encouraged visitors to seek more active experiences while travelling[1].

Tourism 2020 is Australia's national strategy for the tourism industry. It identifies the potential for the industry to grow nominal overnight visitor expenditure from $70 billion in 2009 to between $115 and $140 billion by 2020[2]. The strategies to achieve these targets are: encouraging investment, implementing regulatory reform, such as reducing compliance costs and removing barriers and facilitating new tourism infrastructure projects.

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[1] UNWTO website, *'Capacity Building Workshop, Adventure Tourism'*, accessed 6 June 2017 http://themis.unwto.org/ event/application-unwto-capacity-building-workshop-adventure-tourism-understanding-and-developing-sa

[2] Tourism Australia (2011) 'Tourism 2020), www.tourism.australia.com/content/dam/assets/document/1/6/w/u/3/2002107.pdf, accessed 10 May 2017

STATE LEVEL

There are a number of Tasmanian strategy documents that relate to the tourism (or the visitor economy), which is a key lever to positively influence demand for visitor accommodation in Central Coast and related commercial activities. Collective local efforts need to compliment work by neighbouring councils, the broader region and the State. State strategies are outlined below:

Visitor Economy Strategy 2015-2020 (T21)

The Tasmanian Government and the Tasmanian tourism industry, represented by the Tourism Industry Council Tasmania (TICT), set a target to increase visitor numbers to 1.5m by 2020 to grow employment in tourism industries. Actions in the Tasmanian Visitor Economy Strategy 2015-2020 (T21) focus on four strategic priorities: generate more demand for travel to Tasmania; grow Tasmania's air and sea access capacity; invest in quality visitor infrastructure; and build capability, capacity and community[3].

Events Strategy 2015-2020

The Tasmanian Government Events Strategy 2015-2020 supports the creation of new events to help meet the target of 1.5m visitors to Tasmania by 2020. It aims to become the boutique events capital of Australia, promoting Tasmania as a business events destination; highlighting the social and economic value of events that promote cultural, sporting and artistic pursuits; and to enrich Tasmania's keen sense of community[4].

Parks 21

The Parks and Wildlife Service and the Tasmanian tourism industry, represented by the TICT, has identified a shared long-term goal to facilitate and enhance tourism activity and the overall visitor experience in Tasmania's national parks and reserves. Parks 21, the Joint Strategic Action Plan, identifies three strategic objectives: enhanced tourism focus; sustainable experience delivery; and enterprise and economic activity[5].

Engagement Strategy 2016

The Tasmanian Government Engagement Strategy 2016 emphasises that high-quality visitor engagement plays a critical role in enhancing the overall visitor experience. The three priority actions for implementation are: reimagining our Visitor Information Centres; reviewing directional and wayfinding signage; and reviewing gateways (air and sea ports). Other priority actions include: digital strategy and collateral; drive journeys; and destination/experience advocacy[6].

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[3] Tasmanian Government (2015), 'Tasmanian Visitor Economy Strategy 2015-2020', website accessed 19 August 2017

[4] Tasmanian Government (2015), 'Tasmanian Government Events Strategy 2015-2020', website accessed 2 September 2017

[5] Parks and Wildlife Service Tasmania (2014), *'Parks 21'*, http://www.parks.tas.gov.au/file.aspx?id=38967, website accessed 19 August 2017

[6] Tasmanian Government, Department of State Growth (2016), Tasmanian Visitor Engagement Strategy 2016, Website accessed 2 September 2017

REGIONAL/SUB-REGIONAL LEVELS

The Cradle Coast Authority (CCA) is the regional tourism organisation for the North West and West Coasts of Tasmania representing nine member councils and responsible for implementing strategies to ensure that the region maximises its tourism potential. CCA is guided by the Cradle Coast Tourism Executive creating local, regional and state partnerships. A Service Agreement also exists with Tourism Tasmania to deliver strategies and programs at regional and local levels[7].

CCA has recently released a Regional Marketing Plan and is currently developing a Regional Events, Festivals and Arts Strategy. The Marketing Plan outlines regional strengths, challenges and opportunities and discusses the region's most profitable and ideal customers. The Plan identifies marketing guiding principles, areas of emphasis and strategic priority areas. The Regional Events, Festivals and Arts Strategy will seek to work with stakeholders and create a calendar of high-quality, innovative, diverse events and festivals for the region, with an emphasis on securing events during the low season in winter.

Cradle Mountain Experience Master Plan

The Cradle Mountain Experience Master Plan project aims to improve visitor experience and ensure Cradle Mountain retains its reputation as a premier Tasmanian destination. In June 2017, the State Government committed $21.8m in the 2017/18 budget to progress implementation of the Master Plan's improved visitor amenities. Key features of the upgrades include the construction of a new visitor centre, commercial services hub and village precinct, and a new viewing shelter and viewing platform at Dove Lake as well as a plan for improved transportation within the Tasmanian Wilderness World Heritage Area. Visitation has been growing at Cradle Mountain in recent years and the upgrades may attract even more tourists, with visitor expenditure flowing through the regional economy.

Cradle Country Marketing Group

A partnership agreement exists between Central Coast, Kentish, Latrobe and Devonport City councils to work collectively in order to maximise competitive advantage opportunities for Mersey-Leven catchment area. The Cradle Country Marketing Group is steered by stakeholders including the Cradle Coast Tourism Executive and Tourism Tasmania. The group collaborates on strategic, sustainable and mutually beneficial tourism initiatives, priorities and opportunities. An example is the Cradle to Coast Tasting Trail, which is an integrated marketing strategy by over 40 member business food and wine producers in Tasmania's North West region. Interactive trail itineraries and information is designed to help create convenient touring routes for visitors seeking culinary experiences.

Living City Master Plan - Devonport

Nearby, the city of Devonport (around 25 minutes drive north east of Ulverstone) has developed an urban renewal project aiming to create new retail, business/service and waterfront precincts that emphasis tourism, arts, food and services. This Living City project is a four-staged development, and market testing has commenced for development of the hotel component. According to OCG studies, if completed the hotel

[7] Cradle Coast Authority, http://www.cradlecoast.com, website accessed 15 August 2017

will provide an additional 150 visitor beds, which in the short-term (one to five years) exceeds the projected demand for Devonport by approximately 50 beds[8]. While this hotel would significantly lift the regional supply of available visitor accommodation in the 3.5-4 star type, the Living City Master Plan project also has potential to attract visitors and positively contribute to regional tourism.

LOCAL LEVEL

The Council's actions to influence the tourism industry need to compliment and work within the broader national, state and regional contexts. However, it is also important to differentiate Central Coast as a destination by building on and enhancing our distinctive places and sense of community identity. The Council identified the following through the Strategic Plan 2014-2024[9] community engagement process:

A Vision for Central Coast

Central Coast – Living our Potential

We are a vibrant, thriving community that continues to draw inspiration and opportunities from its natural beauty, land and people and connected by a powerful sense of belonging to our place.

Central Coast Place Marketing Plan 2017

The Central Coast Place Marketing Plan 2017 identifies ways to stay in tune with consumer and travel trends and create a point of differentiation for Central Coast to compete as a destination in crowded marketplaces, including the visitor economy. Place marketing aims to communicate selective images of specific geographical localities or areas to a target audience. "Coast to Canyon" is the tourism place brand for Central Coast and is shown in Figure 1. The Coast to Canyon "Great Natured Place" brand has a strategic capital framework and marketing positioning. The "…it's in our nature" message has been designed to target various audiences such as visitors, new business or locals[10].

Figure 1: Coast to Canyon Tourism Place Brand

[8] Office of the Coordinator General, (2017), 'Tourism Accommodation Supply Analysis: North West Tasmania',
[9] Central Coast Council, 'Central Coast Strategic Plan 2014-2024', Tasmania, pp. 6-8
[10] Central Coast Place Marketing Plan, (2017), http://www.centralcoast.tas.gov.au/wp-content/uploads/2016/11/Place-Marketing-Plan_FINAL-May-2017.pdf

Central Coast Destination Action Plan 2017

The development of the Central Coast Destination Action Plan was facilitated by the Cradle Coast Authority in partnership with the Department of State Growth. The process brought together representatives from all stakeholder groups that benefit from the visitor economy including the Council, State government agencies, industry and the community to develop a plan for Central Coast. The Plan seeks to identify the challenges and opportunities facing the Central Coast and to establish achievable affordable priorities that if delivered, would increase competitiveness of Central Coast in global markets. A Leadership Group for the Plan has been established and the Council are currently in the process of developing specific and measurable tasks for actions of Council responsibility.

Leven Canyon/Leven Valley Master Plan 2018

The Council developed a framework to guide strategic decision making, sustainable development and use of the Leven Valley including the Leven Canyon. Strategies and initiatives were mapped by a Working Group as part of the Leven Canyon Review. This Review considered the values, pressures/challenges and opportunities for the Leven Valley in a balanced and place-based approach that integrated perspectives of residents and key stakeholders. The Review's collective and whole-of-place approach enabled strengths and opportunities to be explored and helped to ensure the Master Plan identified appropriate strategic directions and potential initiatives to guide future developments.

RATIONALE – THE PRESENT SITUATION

Key metrics for Central Coast in 2014[11]:

TRA Metric	Total
Visitors	161,000
Nights[12]	239,000
Average stay (nights)	5
Average spend per day	$31
Average spend per trip	$193
Average spend per night	$84
Visitors to Tasmania	7,069,000
Nights spent in Tasmania	12,519,000
Average stay (nights)	5
Spend in Tasmania	$2,570

[11] Tourism Research Australia website, (2014), '*Local Government area profiles – Central Coast, Tasmania*', http://tra.gov.au/Tourism_in_Local_Government_Areas_2016/LGA_Profiles/index.html, accessed 25 July 2016

[12] Excludes domestic day visitors, who did not stay a night in their trip to the Central Coast

Visitor accommodation	
Providers[13]	43
Airbnb listings[14]	35
TRA Metric	**Central Coast percentages relative to Tasmania**
Visitors	. 1.1% of international visitors . 2.1% of domestic overnight visitors . 5.2% of domestic day visitors . 2.3% of total visitors to Tasmania
Nights	. 0.6% of international visitors . 2.4% of domestic overnight visitors . 1.9% of total visitors to Tasmania
Average stay (nights)	. Slightly under half the rate of international visitors . Slightly over half the rate of domestic visitors . 5 nights; comparable to total Tasmania average
Spend	. 2.6% of international visitors . 1.1% of domestic overnight visitors . 5.1% of domestic day visitors . 1.2% of total visitor spend in Tasmania
Tourism Businesses	**Number**
Non-employing	68
1 to 4 employees	65
5 to 19 employees	48
20 or more	4
Total	185

The Tourism Accommodation Supply Analysis: North West Tasmania undertaken by the Office of the Coordinator General (OCG) examines how current visitor accommodation in the region will cope with growing tourism levels as we move towards the T21 goal of 1.5m visitors by the year 2020.

The study provides a short (one to five year) and medium-term (five to ten year) focus on visitor accommodation supply and demand for the North West Tasmanian hubs of Burnie and Devonport. It provides insights to guide tourism infrastructure and tourism delivery, and future investment and development opportunities to meet projected demand in the region. According to OCG and TRA findings, the level of visitation to the North West Coast

[13] Central Coast Council Ulverstone Visitor Information Centre, (2017)
[14] Office of the Coordinator General, as at December 2016. Anecdotal evidence suggests this figure is increasing.

enjoyed strong growth in neighbouring cities of Burnie and Devonport for the 2014/15 and 2015/16 period[15].

While statistically limited, occupancy data shows strong growth in annual average occupancy across the region since the 2013/14 period[16]. OCG demand analysis indicates that the number of visitor nights will grow and that there will be a shortage of 3.5-4 star hotel/motel style accommodation, particularly during peak summer months[17]. There are currently 150 rooms proposed in Devonport (the Living City Master Plan hotel development). Once complete, this hotel would significantly lift the supply of available visitor accommodation in the 3.5-4 star type, however there is scope for accommodation demand growth and a potential undersupply in Burnie[18].

To determine the future number of rooms needed in Central Coast, the OCG created four scenarios based on assumptions. The first figure in the below table indicates the projected need for double (or twin) beds. Halving this figure provides an indication of the projected need for rooms. Scenario 1 (S1) is based on the assumption that visitor nights to the North West hubs will grow at the same rate as forecasts by Tourism Research Australia (TRA) forecasts for Tasmania. Scenario 2 (S2) is based on T21 visitation targets of reaching 1.5m by 2020. Scenario 3 (S3) is based on increased market share in the North West hubs assuming that the T21 growth target is reached and that the share of total visitors increased from 8% to 10%. Scenario 4 (S4) is based on T21 visitation targets combined with an increase in visitors to Cradle Mountain in line with the Cradle Mountain Experience Master Plan.

Bed/Room Requirements[19]:

North West Hubs	S1 Base Case TRA Growth	S2 T21 Target	S3 Increased Market Share	S4 Cradle Mountain Master Plan
Burnie (number of double beds / rooms needed)				
2021	7 / 3	106 / 53	185 / 92	106 / 53
2024	123 / 61	294 / 147	439 / 219	294 / 147
Devonport (number of double beds / rooms needed)				
2021	-18 / -9	-42 / -21	192 / 96	106 / 53
2024	208 / 104	286 / 143	680 / 340	294 / 147

[15] Economy id (2016), https://economy.id.com.au/cradle-coast/tourism-visitors-nights, Cradle Coast Authority, website accessed 20 August 2017
[16] Australian Bureau of Statistics, (2016), *Tourism Accommodation, Tasmania,* http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/8635.02014-15, CAT 8635Do007_20152016, website accessed 13 July 2017
[17] Office of the Coordinator General, (2017), 'Tourism *Accommodation Supply Analysis: North West Tasmania'*. Tasmanian Government
[18] OCG supply and demand projections are dependent on actual visitation rates and movement patterns over time
[19] OCG (2017), see above note 17

APPROACH

The Council should continue to make a positive contribution through upgrades to streets, parks and laneways, wayfinding, encouraging fine grain development and events. Adopting a development approach can create an authentic experience for visitors and enhance the distinctive sense of shape and place to market in a Prospectus of development and investment opportunities.

This Strategy is not just for the Council to deliver on. Many stakeholders, associations and businesses are already working on activities and actions that are making a positive difference to positively influencing the visitor economy and attracting new development investment in Central Coast. The Strategy is the roadmap to follow to create a Prospectus and positively influence our vision and preferred future around this issue. Everyone can play a role and thus the energy and resources of our collective efforts can be harnessed. This is part of the Council's destination management approach where we build relationships; make productive use of our networks and work collaboratively to tackle shared issues.

Working together with tourism operators, State Government Departments, agencies and the Central Coast community to develop capacity and foster a collaborative culture assists with mobilising community action, which can lead to identification of new innovative and sustainable place-based solutions. Supporting collaborative environments can also facilitate design of visitor experiences, customer service and visitor management. This may lead to creating long-term resilience for Central Coast's visitor accommodation and related commercial activities.

Consortia - A Network Approach

The visitor economy in several European countries employs the concept of 'consortia', a network approach to compensate for the disadvantages associated with small size. A consortium is a group of stakeholders (often between 10 and 20) that pools member resources to pursue integrated marketing and product development strategies. The Coast to Canyon Tourism Association is comprised of a number of local tourism related representatives and local stakeholders and is an example of the approach. Consortia more effectively represents the interests of members and provides access to relevant information and financing. Ideally, a consortium creates efficient economies of scale without compromising the autonomy and character of the individual businesses and can be increasingly used for tourism efforts in Central Coast[20].

[20] For example, the Cartwheel cooperativein southwestern England has 200 member vacation farms in 2,000 (or about 5% of all farms in the region). It is an interesting example of a large consortium that engages in innovative practices such as the provision of local food supplies to visitors and the utilisation of rural development grants from the European Union.

VISION

WILLING AND ABLE

- Visitor accommodation is supported by our community and actively promoted by all; and
- Whatever we are doing or wherever we are, there is visible link to the Coast to Canyon place brand or its values.

LOCAL BUSINESSES

- Our industry sectors and community groups collaborate and network, aiming to create consortiums to increase economies of scale; and
- We work together, share knowledge and provide referrals to local businesses for the benefit of all in our community.

OUR IDENTITY

- We socialise and enjoy a variety of unique identities and experiences in our communities.
- Our vibrant, thriving and genuine communities are visible and admired by both visitors and investors; and
- Our attractions are connected and supported by high quality social and physical infrastructure.

GUIDING PRINCIPLES

The following principles will guide the work and approaches of the Council and stakeholders towards achieving positive change for visitor accommodation in Central Coast. The first four guide the Council's Social Planning Framework, with the fifth specific to the Strategy.

MAKING A DIFFERENCE

- Transforming the systems and relationships to produce social impact and better community outcomes;
- Aligning practices, delivery systems and culture with the Central Coast vision; and
- Taking action and developing a Prospectus of development and investment opportunities.

INNOVATION

- Using the Strategy to align effort across policy and service domains;
- Identifying improved and new ways of working; and
- Providing inspiration and incentives to encourage innovation and investment to achieve agreed outcomes.

COLLABORATION

- Working together to achieve positive outcomes;
- Using a shared vision and purpose;
- Building on existing assets/strengths;
- Developing broad coalitions to identify and resolve key challenges; and
- Developing service agreements, partnerships and other effective collaborative models.

LEARNING

- Developing knowledge, skills and attitudes as a foundation to change;
- Starting with young people while emphasising lifelong learning;
- Integrating learning and education into all approaches; and
- Raising awareness through social marketing and cross-promotion.

A FOCUS ON VISITOR ACCOMMODATION

- Meeting the needs of current consumers and attracting consumers of the future;
- Working together on relevant strategies to enhance and connect local attractions, experiences and products;
- Engaging with stakeholders to develop a Prospectus of development and investment opportunities;
- Supporting growth and improved quality of commercial operations and related activities; and
- Doing with, not doing for.

CONTACTS

If you would like more information or want to share what you are doing please contact:

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FUTURE DIRECTIONS AND STRATEGIC OUTCOMES

SOCIAL PLANNING FRAMEWORK MODEL

The Social Planning Framework (SPF) places the Central Coast community vision at the centre. The SPF model illustrated in Figure 2 links SPF priority areas (future directions) with dimensions of the Council's Strategic Plan 2014-2024, World Health Organisation Social Determinants of Health and the State Government's Healthy Tasmania Plan, to place-based needs.

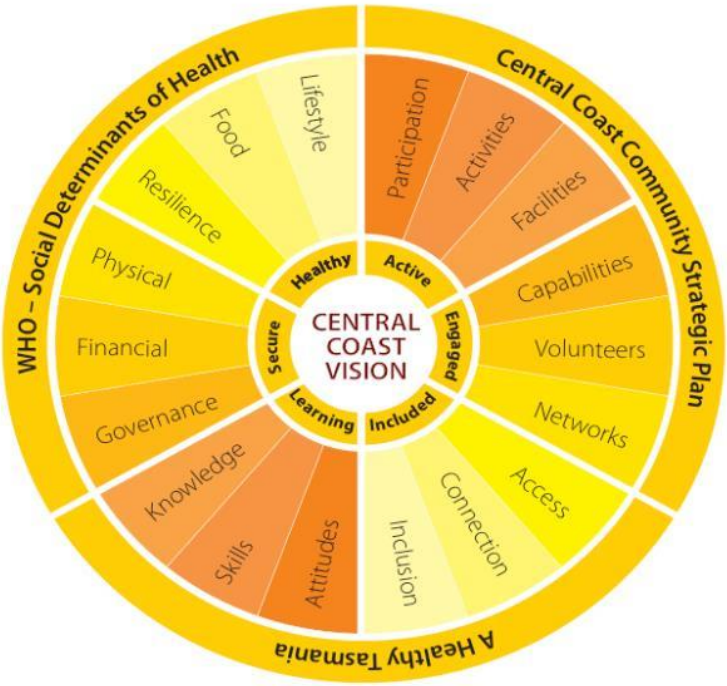

Figure 2: Social Planning Framework Model

FUTURE DIRECTIONS

The Action Plan identifies actions and related tasks that the Council will be able to undertake within the three roles of provider, facilitator and advocate. These actions aim to achieve the associated strategic outcome.

Actions are categorised under the four future directions identified by the SPF to make a difference for the Central Coast: active, engaged and included:

Active

Opportunities and facilities to gather and participate in recreational activities and cultural experiences.

Engaged

Capabilities and networks to volunteer our time and skills and engage in decisions that affect us.

Included

Connectivity and inclusivity for our communities to access services, shops, education, work and play.

STRATEGIC OUTCOMES

Identifying strategic outcomes and indicators to measure enables evaluation of the Strategy's implementation and whether a positive difference is being made for the community. The strategic outcomes are:

1. Brought new development sites to shovel-ready stage to include in a Prospectus;
2. Facilitated development of networks and collaboration to achieve common objectives;
3. Identified and removed barriers (where possible) to investment and development; and
4. Continued to contribute to tourism demand and the tourist experience.

TIMINGS

Short-term	One year
Medium-term	One to three years
Long-term	One to five years (+)

KNOWING IF ANYONE IS BETTER OFF

The Council will take a Results Based Accountability (RBA) approach to measuring the performance of the Strategy. This approach starts with the end 'results' desired for a community or population group and then identifies the indicators, which can be measured to quantify the achievement of desired results.

A measure of how well a program, agency or service system is working involves three types of interlocking measures shown below:

1. How much did we do?
2. How well did we do it?
3. Is anyone better off?

Performance Measures

	Quantity	Quality
Effort	How much service did we deliver?	How well did we deliver it?
Effect	How much change/effect did we produce?	What quality of change/effect did we produce?

ACTION PLAN

Active – Future Direction 1					SPF Priority Area
Strategic Outcome	**SPF Dimension**	**Action**	**Council Role**	**Timings**	**Resources**
Brought new development sites to shovel-ready stage to include in a Prospectus	Activities	Identify potential development opportunity sites and investigate interest to develop concept plans	Provider	In progress	Community engagement
	Activities	Engage a marketing consultant to create a Prospectus of development sites	Provider	Short term	Community engagement
	Activities	Market test a Prospectus to potential developers and liaise with the OCG	Provider	Medium-term	Council collateral
	Activities	Assist potential developers with general enquiries	Provider	Long-term	Council collateral
Identified and removed barriers (where possible) to investment and development	Activities	Develop place marketing initiatives to improve identity and distinctiveness of places and alignment of stakeholders	Provider	Short-term	Council collateral
	Activities	Construct advantage through initiatives to enhance distinctiveness of places	Facilitator	Long-term	Council collateral
Continued to contribute to tourism demand and the tourist experience	Facilities	Investigate facilitation of new tourism infrastructure projects	Facilitator	Long-term	Council collateral
	Facilities	Investigate ways to modernise Visitor Information Centres, including technology platforms	Provider	Medium-term	Council collateral
	Participation	Support and pursue new events, such as the small conference market and sporting/artistic pursuits	Provider	Short-term	Council collateral
	Activities	Investigate and support further development of the Ulverstone Wharf Precinct	Provider	Short-term	Council collateral
	Activities	Investigate and support further sustainable development of the Leven Canyon Reserve	Provider	In progress	Council collateral

Active – Future Direction 1

SPF Priority Area

Strategic Outcome	SPF Dimension	Action	Council Role	Timings	Resources
	Activities	Investigate and support further tourism development in the Dial Range Reserve, south of Penguin	Provider	Short-term	Council collateral
	Activities	Participate in the development of a Dial Range Joint Recreation and Land Management Plan	Provider	Medium-term	Council collateral
	Activities	Review drive/cycle journey marketing strategies and develop marketing/promotional activities	Provider	Medium-term	Council collateral
	Activities	Encourage investment and value-adding in recognised growth tourism markets	Provider	Long-term	Council collateral
	Activities	Measure trends in visitor accommodation related metrics, including Airbnb	Provider	In-progress	Council collateral

Engaged – Future Direction 2					SPF Priority Area
Strategic Outcome	**SPF Dimension**	**Action**	**Council Role**	**Timings**	**Resources**
Facilitated development of networks and collaboration to achieve common objectives	Networks	Create and foster a collaborative tourism-related culture	Facilitator	Long-term	Community engagement
	Networks	Investigate/develop a visitor accommodation provider consortia to improve economies of scale and assist with strategic marketing activities	Facilitator	Long-term	Community engagement
	Networks	Develop destinations through implementation of the Central Coast Destination Action Plan, in particular culinary and adventure tourism experiences	Facilitator	Medium-term	Strategic alliances
	Networks	Work with community leaders and commercial operators to identify emerging opportunities and solutions to key needs/challenges	Facilitator	Medium-term	Community engagement
	Networks	Review involvement in the Cradle Coast Tasting Trail and Cradle Country Marketing Group	Provider	Medium-term	Strategic alliances
	Capabilities	Support hospitality and retail sectors in partnership with Central Coast Chamber of Commerce and Industry	Provider	Medium-term	Strategic alliances
	Capabilities	Work collaboratively with stakeholders to improve offerings of tourism-related attractions and experiences	Facilitator	Long-term	Community engagement
	Capabilities	Review digital strategy/collateral and consider integrating a consortia approach into planned marketing	Provider	Medium-term	Policy
Identified and (where possible) removed barriers to investment and development	Networks	Lobby the Cradle Coast Authority (CCA) for increased strategic marketing of tourism-related products and experiences to key target audiences	Advocate	Long-term	Strategic alliances
	Networks	Work with local business leaders to increase new investment opportunities in Central Coast	Facilitator	Short-term	Community engagement

Engaged – Future Direction 2					SPF Priority Area
Strategic Outcome	**SPF Dimension**	**Action**	**Council Role**	**Timings**	**Resources**
	Networks	Lobby CCA for joint development of a Liveable Region Strategy to positively influence tourism demand	Advocate	Long-term	Strategic alliances
Continued to contribute to tourism demand and the tourist experience	Volunteers	Develop Place Ambassadors that advocate destinations and experiences to visitors	Provider	In progress	Community engagement

Included – Future Direction 3					**SPF Priority Area**
Strategic Outcome	**SPF Dimension**	**Action**	**Council Role**	**Timings**	**Resources**
Brought new development sites to shovel-ready stage to include in a Prospectus	Connection	Support and encourage visitor economy related stakeholders to increase collaboration and information exchange	Facilitator	Medium-term	Community engagement
Identified and removed barriers (where possible) to investment and development	Access	Ongoing analysis/monitoring of tourism-related supply/demand and growth markets to understand needs of the community in the context of the State, national and international environments, including the sharing economy	Advocate	Short-term	Council collateral
	Access	Identify barriers to investment, i.e. regulatory issues such as compliance costs and consider feasible solutions	Provider	Long-term	Council collateral
	Access	Lobby the CCA for provision of new local tourism-related programs, initiatives and services	Advocate	Long-term	Strategic alliance
	Access	Investigate improved road connection to Cradle Mountain	Provider	Long-term	Council collateral
	Connection	Review Gateway signage for Ulverstone and Penguin	Provider	Complete	Council collateral
	Connection	Review directional wayfinding signage, in particular with the objective to attract visitors to (and around) rural and outlying places	Provider	Medium-term	Council collateral
	Connection	Lobby the State government and CCA for improved public transport services	Advocate	Long-term	Strategic alliance

MEASUREMENT

Strategic Outcome	How much did we do?	How well did we do it?	Is anyone better off?
Brought new development sites to shovel-ready stage to include in a Prospectus	. # of potential development sites identified . # of sites brought to the shovel-ready stage	. # of people participating in Prospectus development . # of sites included in a Prospectus	. # of developers approached relating to a Prospectus . # of development enquiries handled
Facilitated development of networks and collaboration to achieve common objectives	. # of stakeholder meetings facilitated . # of common objectives identified	. # of stakeholders engaged	. # of stakeholders networked in a consortia or similar model . % increase in visitor spend per trip
Identified removed barriers (where possible) to investment and development	. # of barriers to investment and development identified	. # of solutions to barriers identified	. # of new visitor accommodation developments or investments
Continued to contribute to tourism demand and the tourist experience	. # of promotional initiatives/activities aimed at increasing tourism demand	. # of new visitor experiences identified . % increase visitor spend per night	. % increase in Central Coast visitation . # of night stays in Central Coast

ATTACHMENT 1 – TYPOLOGY OF TOURISM

The Leisure Tourist

The United Nations World Tourism Organisation defines tourists as people "traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".[21] However, it is important to understand there are differences between travel for business and travel for leisure. There is often a misunderstanding that business events are a 'category' of leisure tourism.

The differentiation between the two stems from two fundamental principles:

- Selection of a holiday destination is markedly different from the selection of a destination to hold and attend a business event.
- The decision to travel for leisure is taken in a totally different context and by a different 'person' than that for a business event.

Leisure visitors are primarily motivated to travel because of the opportunity to explore other cultures, to experience freedom and personal growth (characterised by alternative tourism), and to visit family and friends. Southern Tasmania has a significant market share of the business tourism market as a result of scale.

The Business Tourist

The principal motivator to attend a business event is the business activity itself rather than the desire to travel for pleasure[22]. Business events are part of the tourism industry because of their potential to attract visitors (both delegates and accompanying persons) and to extend their stay beyond the business event. The infrastructure and services used by the business events delegates are also used by the leisure tourist.

While tourism may be a consequence of the event, there is no overriding tourism objective. There are two aspects to the 'selection process' of a business event:

- Event organisers (decision-makers of holding the event) - are predominantly motivated by the suitability of the venue, a strong local host association and the range of venues, visitor accommodation and transport facilities.
- Delegates (attendees to the event) - are primarily influenced by the content of the business program as well as the networking opportunities, location and accessibility of the venue[23].

[21] UNWTO Website, http://www2.unwto.org/, accessed 25 October 2017
[22] Business Events Council of Australia, (2011), '*Business events and leisure tourism'*, http://www.businesseventscouncil.org.au/business-vs-leisure-tourism.html, website accessed 6 July 2017
[23] Deery, M., Fredline, L., and Jago, L., (2005), *'A framework for the development of social, and socio-economic indicators for sustainable tourism in communities'*. Tourism, Review International, 9(1), pp. 33, 51

The Alternative Tourist

Alternative tourists are characterised by intellectual curiosity, self-confidence, openness to new experiences and respect for other cultures. Also described as 'adventurers', they are risk takers who prefer to explore offbeat places perceived to be more authentic than 'tourist destinations'[24].

Alternative tourists are FITs (free and individual travellers) who avoid high volume package tour arrangements and instead travel as individuals or in small groups, often remaining in a destination for an extended period of time. They often prefer to travel in the off-season, knowing there will be fewer tourists so alternative tourism tends to be less susceptible to the pronounced seasonality that often characterises mass tourism. In addition, visitors typically originate from a diverse array of countries, since the mass marketing systems that skew mass markets to one or two dominant sources are not in place.

The Green Tourist

Overall, 'green consumers' can be loosely defined as those who express concern about environmental issues and consciously engage in green consumer behaviour at least some of the time. Green consumers account for about three-quarters of the populations in Australia, the UK and the USA[25].

The growth of alternative tourism provides evidence to the robustness of green and socially responsible consumption within at least one facet of the tourism industry. However, the conventional tourism industry is more likely to meaningfully pursue sustainability-based strategies if there is compelling evidence of green inclinations towards specific things and behaviour within the much larger conventional mass tourist market. As with green consumption in general, the patterns within conventional tourism are variable but generally indicative of a significant green component.

Perhaps the most wide spread evidence of green sentiment among conventional tourists is almost universal desire to experience one's holidays in a scenic, unpolluted environment. For example, research from Germany indicates that 78% of travellers 'always' and 34% 'sometimes' sought information about the environmental condition for intended destinations and that 84% were influenced in their destination selection by environmental information[26].

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[24] Plog, S., (1998), Why destination preservation makes economic sense', Global Tourism, 2nd edn, pp.251-266
[25] Roberts, J., 'Green consumers in the 1990's: profile and implications for advertising', Journal of Business Research, 26, pp. 217-231
[26] Swarbrooke, J., and Horner, S., eds. (1999), *'Consumer behaviour in tourism',* Butterworth-Heineman

Typology of Tourism

Figure 3 identifies common forms of tourism (as well as their subsets) and also demonstrates their orientation towards attractions (experiences), accommodation or motivation. It shows how the different forms of tourism gravitate toward one of the three criteria and that some combine attraction with motivation. The forms vary in the extent that the market themselves as 'alternative tourism' service providers; some cater for the mass tourism market as well, e.g. ecotourism and historical re-enactments[27].

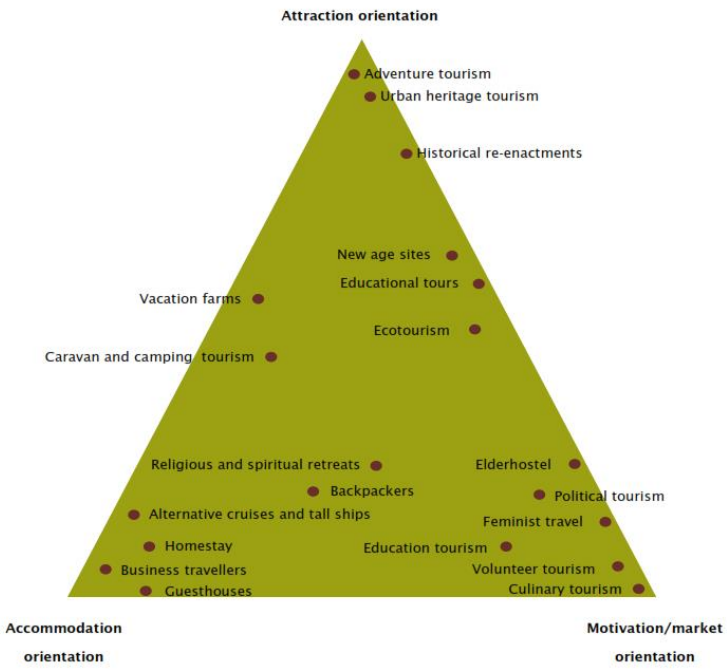

Figure 3: Types of alternative tourism[28]

Growth Market Trends

Adventure tourism has experienced significant growth in recent years. Cycling, and nature-based tourism such as backpacking, trekking and hiking (and bushwalking) are growth adventure activities globally. An increasing number of adventure tourists are embarking on both road and mountain biking and participating in cycling events. The Council has developed a Central Coast Cycling Strategy to harness opportunities created by the tourism trend. Cycling infrastructure provides an attraction to tourists and diversifies transportation options for locals, the Central Coast Shared Pathway Network connection throughout most of Central Coast is an example of cycling infrastructure. Final stages of this connected shared pathway network should be completed soon. Integrated shared pathways that connect destination along the North West region is planned, which would enhance the work completed by individual councils and improve the regions competitiveness to attract cyclists.

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[27] Gossling, S., Borgstrom, C., Hortmeier, O., and Saggel, S., (2002), *'Ecological footprint analysis as a tool to assess tourism sustainability'* Ecological Economics 43, pp. 199-211
[28] Weaver, D., (2006), *'Sustainable tourism'*, Eslevier, Great Britain, pp.38-57

Backpacking and bushwalking are forms of exploring destinations on foot, often on a budget. Several States have developed Backpacker Action Plans. Tourism in Tasmania's National Parks and Reserves is important for its ability to maintain and increase the value of these protected areas into the future. Visitor focused infrastructure facilities, and tourism businesses offer people the opportunity to experience natural and cultural heritage in areas that they may not otherwise have been able to access. These experiences, coupled with interpretation, can increase visitors' knowledge and appreciation of parks and reserves, and the need to look after our protected area[29]. The Cradle Mountain Experience Master Plan for example aims to improve visitor experience and ensure Cradle Mountain retains its reputation as a premier Tasmanian destination.

Rapid growth in Tasmanian tourism has not been shared across all regions. Importantly, many of these regional economies are increasingly dependent on tourism; the visitor economy. It is in these regional areas that parks and reserves are often the most important asset and driver for tourism, such as the Dial Range (Dial Range Reserve) which is located to the south of the Penguin township and the Leven Canyon in the Leven Valley. It follows that nature-based tourism has the most potential to contribute to Central Coast's local economic development in activities such as bushwalking, mountain biking, kayaking, cruising or alternative accommodation provision[30].

Attractions

The characteristics of the alternative tourist drive a preference for 'authentic' cultural, historical and natural attractions (experiences) that are perceived to capture a destination's unique sense of place and allow for interactions between visitors and local residents. This contrasts with generic and purpose built theme parks and casinos and other attractions favoured by mass tourists. Alternative tourism attractions may in some instances be non-commercialised, but it is more likely that there is a degree of commercialisation because of the need for the product to be financially viable.

Accommodation

North West Tasmania's supply and demand analysis study commissioned by the Office of the Coordinator General indicates demand for corporate ownership of 3.5-4 Star hotels/motels. A hotel/motel is a commercial establishment that provides short and long term accommodation facility. Hotels/motels are classified into 'Star' categories and different countries have different 'Star Rating' requirements. The standards below define quality for Australian accommodation 'Star Ratings'[31]:

5 Star properties typify luxury across all areas of operation. Guests will enjoy an extensive range of facilities and comprehensive or highly personalised services. Properties at this level will display excellent design quality and attention to detail.

[29] Tasmania Parks and Wildlife Service and Tourism Industry Council of Tasmania, (2014), '*Parks 21 Joint Strategic Action Plan'*, http://www.parks.tas.gov.au/index.aspx?base=38968
[30] Tasmania Parks and Wildlife Service and Tourism Industry Council of Tasmania, (2014), see above note 26
[31] Star Ratings, (2017), '*Star Ratings Australia',* https://www.starratings.com.au/about-us/star-ratings/whatarestarratings

4 Star properties achieve a deluxe guest experience. A wide range of facilities and superior design qualities are typically complemented by service standards that reflect the varied and discerning needs of the guests.

3 Star properties deliver a broad range of amenities that exceed above-average accommodation needs. Good quality service, design and physical attributes are typically fit for purpose to match guest expectations.

2 Star properties focus on the needs of price conscious travelers. Services and guest facilities are typically limited to keep room rates affordable and competitive but may be available upon request or are fee-based.

1 Star properties offer budget facilities without compromising cleanliness or guest security. Guests may access fee-based services or facilities upon request.

(**½ Star** ratings indicate modest improvements in the quality and condition of guest facilities)

Tourism Industry and Accommodation Implications

Adventure Tourism

Adventure tourism broadly encompasses alternative tourism. It can be defined as experience-based holiday with added value as visitors learn and interact with local populations and connect with their core values[32]. There are two theoretical and empirical dimensions of adventure tourism: hard and soft, Table 2 lists activity types and links with adventure types. 'Soft' adventure tourism goes beyond the typical tourist itinerary, is rewarding for the spirit and the mind and is safe and without excessive physical demands. 'Hard' adventure tourism has a more physical challenge, higher element of risk, is rewarding to the spirit and push people outside their comfort zones. Anecdotally, adventure tourism in Central Coast holds a significant market share alongside visiting friends and relatives.

Table 2: Activities and their adventure type[33]

Activity Type	Adventure Type
Archaeological expedition	Soft
Backpacking	Soft
Birdwatching	Soft
Camping	Soft
Canoeing	Soft
Caving	Hard
Climbing (mountain/rock/ice)	Hard
Cycling (road/mountain)	Soft/hard
Eco-tourism	Soft

[32] UNWTO, (2014), *'Global report on adventure tourism'*, AM Reports (9), Spain
[33] Adventure Travel Trade Association (2013), *'Adventure Tourism Market'*, biz/docs/research/adventure-tourism-market-study-2013-web.pdf, p. 4, accessed 2 June 2017

Activity Type	Adventure Type
Educational programs	Soft
Environmentally sustainable activities	Soft
Fishing/fly fishing	Soft
Hiking	Soft
Horseback riding	Soft
Hunting	Soft
Kayaking/sea/white-water	Soft
Nature-based walks	Soft
Orienteering	Soft
Rafting	Soft
Research expeditions	Soft
Sailing	Soft
Scuba diving	Soft
Snorkelling	Soft
Skiing/snowboarding	Soft
Surfing	Soft
Trekking	Hard
Volunteer tourism	Soft

Adventure tourists rank areas of natural beauty as the most important factor in choosing their destination, followed by the activities available, learning about different cultures and climate[34]. They are savvy travellers who spend time researching and planning their ideal experiences. Most relevant research on adventure tourism is from outdoor recreation. The major themes are: psychological, including thrills, conflicts and norms; safety, including injuries, illnesses and insurance; impacts (whether ecological, social or economic); and participation and management[35]. Characteristics and regulatory themes include: operational audits; commercial statistics; client characteristics; site geography; equipment manufacture; safety and insurance; recreation ecology; adventure destination marketing; and links with amenity migration and lifestyle[36].

Cycling

A cycling tourist is of any nationality including locals, who spend a minimum of 24 hours away from home, i.e. not one-day trippers, and who use a bicycle as a mode of transportation during their holiday and to whom cycling is important[37]. Being out-of-doors and exercising are the main reasons for choosing a cycling holiday. Cycling, swimming and visiting cultural attractions are the preferred tourist activities[38]. Entrance-fee-based attractions

[34] Adventure Travel Trade Association (2013), see note 30
[35] Newsome, D., Moore, S. and Dowling, R., (2002), '*Natural area tourism'*, Channel View
[36] Petty, R., McMichael, S., and Brannon, L., (1992), 'The elaboration likelihood model of persuasion: applications in recreation, tourism and natural management', M. Manfredo ed., Sagamore, pp. 77-101
[37] Stifstidende. F., (1996), *'The cycling tourist'*, Denmarks Radios TV-Avis
[38] Poon, A., (1993), 'Tourism, technology and competitive strategies', CAB International

are not very popular among cycling tourists as compared to free activities. Cycling tourists mainly choose a cycling holiday because they want to see beautiful landscapes and take exercise.

The most common reason for choosing to follow designated paths are the beauty of the routes, such as the Central Coast Shared Pathway Network that provides peace and quiet and traffic safety. Integration of the pathway network regionally between neighbouring councils will enhance the experience and impel cycling tourism growth.

Cycling follows the alternative tourism type. Cycling tourists prefer environmentally friendly accommodation. It was shown in Denmark that the cycling tourist uses the following accommodation:

Table 3: Choice of accommodation of the cycling tourist[39]

Camping	Back-packer Hostel	Rented holiday house	Own Holiday House	Hotel/ Motel	Holiday Centre	Yacht	Primitive Campsite	Total
54%	17%	8%	1%	9%	1%	1%	8%	99%

Backpacking

The backpacking tourism sector has been extensively studied. It is defined mainly in participant terms as involving usually young and budget-minded tourists, i.e. the 'backpacker' travelling for extended periods of time. Research indicates that backpackers usually stick to many of the core attributes of alternative tourism, such as the preference for small-scale, locally owned accommodations and independent travel arrangements as well as a desire to interact with local residents[40]. Backpacking is less vulnerable to fluctuating economic conditions and backpackers are more likely to be resilient travellers[41]. Backpackers can be regarded as a distinctive sub-culture of alternative tourismbecause of their tendency to travel and socialise with other backpackers while avoiding other types of tourist, constructing and demonstrating in the process an overt 'anti-tourism' identity[42].

[39] Simonsen, P. S., Jorgensen, B and Robbins, D., (1998), *'Cycling tourism",* Unit of Tourism Research Centre of Bornholm, Denmark, pp. 31-120

[40] Loker-Murphy, L., and Pearce, P., (1995), *'Young budget travellers: backpackers in Australia',* Annals of Tourism Research, 22, pp. 819-843

[41] Tourism Victoria, (2009), '*Backpacker Tourism Action Plan 2009–2013*', Victorian Government, Melbourne

[42] Welk, P., (2004), 'The beaten track: anti-tourism as an element of backpacker identity construction', In Richards, G., Westerhausen, K., and Macbeth, J., (2003), 'The Global Monad: Backpacker Travel in Theory and Practice', pp. 77-91, Channel View

An interesting pattern of behaviour that results from this tendency is exceptionally flexible itineraries and travel parties that change impulsively in response to encounters with other backpackers and exposure to the backpacker 'grapevine'[43]. It is ironic that while backpackers identify themselves in strongly individualistic terms, they can often be readily distinguished by their appearance (and by their backpack in particular) and they are predictable in terms of what they eat and where they congregate. The 'backpacker hostel' is a specialised type of accommodation that encourages these cliquish and predictable yet unpredictable tendencies by serving as a 'gathering place' for the sub-culture[44].

Food Tourism and the Culinary Tourist

Culinary tourism focuses on the search for and enjoyment of prepared food and drink. Culinary tourism promotes all gastronomic experiences and it's the pursuit of unique and memorable eating and drinking experiences. Local cuisine is the motivating factor in choosing a destination and culinary tourists are more likely to research and plan their trips using both print and online materials[45]. A culinary tourist can be a visitor who has travelled to town specifically to dine at a specific establishment or a business traveller who decides to dine at a restaurant.

It is important to take full advantage of the region's culinary tourism opportunities including aligned branding and marketing strategies for sub-regions, including Central Coast, that promote a unique and memorable dining degustation[46]. For example, identifying a regional specialty and collaborating with local restaurants and cafes to create their own version of it. Strategies should create unique local programs and events that cannot be experienced during leisure travel such as: cooking classes; visiting farmers' markets; gourmet food shopping; participating in winery tours; and attending food and wine festivals/events. Guesthouses, homestays and bed and breakfast style accommodation are the predominant accommodation type for the culinary tourist.

Caravan and Camping Tourism

Caravan parks are an essential facility for many visitors, particularly in Central Coast. Caravan or camping visitors spend more nights in regional Australia than visitors using other forms of accommodation[47]. Caravan parks and campgrounds provide a range of accommodation options and other tourism services to meet the needs of a wide cross section of visitors. The Caravan Industry Association of Australia (CIAA) is the peak national body for the Australian caravan and camping industry and Caravanning Tasmania Incorporated is the peak industry organisation for caravan parks in the State.

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[43] Sorensen, A., (2003), *'Backpacker ethnography'*, Annals of Tourism Research, 30 pp. 847-867.
[44] Westerhausen, K., and Macbeth, J., (2003), 'Backpackers and empowered local communities: natural allies in the struggle for sustainability and local control?' Tourism Geographies, 5, pp. 71-86.
[45] Mullins, P., (1992), 'Cities for pleasure: the emergence of tourism urbanisation in Australia', Built Environment, 18 (3), pp.187-198
[46] Hudson, B., and Ritchie, J., (2001), *'Tourist behaviour: an analysis of behaviour and marketing'*, Journal of Travel and Tourism Marketing, 10 (2/3), pp.1-22
[47] Caravan Industry Association of Australia, http://www.caravanindustry.com.au/marketing-to-government, website accessed 15 June 2016

The Campervan and Motorhome Club of Australia (CMCA), with its 60,000 members, is very active in lobbying for change to restrictive camping regulations. Although not officially endorsed by the club, some members boycott towns they regard as 'unfriendly'. Central Coast currently enjoys 'friendly' status. Combined with the membership of the various caravan club organisations under the motouring banner, the CMCA has considerable market power in the sector. CMCA recently stated in its monthly member's magazine (the 'Wanderer') that member users of 'free camping' are prepared to pay an appropriate fee if it resulted in better facilities, safety and security.

Farm-Based Tourism

'Farm-based tourism', under a variety of guises, e.g. vacation farms (farm stays) and 'wolfing', is one of the longest established forms of organised alternative tourism, having been in existence in Europe as a formal industry since the late 1800s[48]. To qualify as a form of alternative tourism, farm-based tourism should involve operations that are locally owned and derive most of their income from agriculture, i.e. 'working' farms. Individual operations should also be small, with maximum thresholds of five or ten units of overnight accommodation usually stipulated. As an industry, farm-based tourism is a relatively small sector in Australia, New Zealand, Canada and the USA. In contrast, the UK, France, Germany and Austria, farm-based alternative tourism is much larger[49]. However, there are several working farms in Central Coast area that have created an environment where farm-based tourism is significant. It is noted that the working farms subset of alternative tourism can create negative feedback from the local community.

Farm-based tourism is an attractive form of economic perspectives because of its potential to supplement and diversify rural economies in peripheral areas, such as Central Coast's rural areas, which suffer declining agricultural economies due to the impacts of globalisation in the knowledge economy of the 21st century[50]. Critically, tourism typically accounts for only a small portion of a farm's total income, but this revenue is perceived by many operators to constitute the difference between survival and failure[51]. Farm-based tourism is a symbiotic opportunity for areas where neither agriculture nor tourism are independently viable[52]. Importantly, investment costs can be minimal for farmers who have rooms available in their homes when children leave the household and there is evidence that the tourism component provides income and power for female household members who provide most of the relevant labour[53]. Research indicates that many participants enjoy the contact with guests as an outlet for relieving stresses caused by social isolation[54].

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[48] Frater, J., (1983), 'Farm based tourism in England:-planning, funding, promotion and some lessons from Europe', Tourism Management, 4, pp.155-166
[49] Weaver, D., and Fennell, D., (1997), *'The vacation farm sector in Saskatchewan: a profile of operations'*, Tourism Management, 18, pp. 357-365.
[50] Ilbery, B.,Bowler, I., Clarke., G. et al. (1998), 'Farm-based tourism as an alternative farm enterprise: a case study from the Northern Pennise, England', Regional Studies, 32, pp. 355-364
[51] Frater, J., (1998), 'Farm tourism in England: planning, funding promotion and some lessons learned from Europe', Tourism Management, 4, pp. 155-166
[52] Inskeep, E., (1991), 'Tourism planning: an integrated and sustainable development approach', Van Nostrant Reinhold
[53] Dernoi, L., (1981), 'Alternative tourism: towards a new style in north-south relations', Tourism Management, 2, pp. 253-264
[54] Opperman, M., (1998), *'Rural tourism in Germany: farm and rural tourism operators',* Journal of Vacation Marketing, 4, pp. 465-281

Volunteer Tourism

Volunteer tourism encompasses a diverse array of experiences and settings that involve tourists who receive no financial compensation while undertaking various forms of usually, organised social and/or environmental work in the destination[55]. It is explicitly associated with enhancement sustainability, not just from the destination perspective, but also in terms of the personal development of the participating tourist. Another distinctive characteristic is the extent to which volunteer tourism is associated with environmental, religious and social non-profit NGOs (non-governmental organisations) based in major origin regions.

Guesthouse Tourism

Where volunteer tourism is defined in terms of tourist motivation, guesthouse tourism such as bed and breakfast type accommodation is defined, like homestay and farm-based tourism, primarily by accommodation type. There is no standard definition of 'guesthouse', though it is usually perceived as a specialised tourist facility that has a small number of accommodation units or rooms and is usually locally owned. To the extent that owners often reside on-site, the guesthouse sector overlaps with homestay tourism.

Education Tourism

With education tourism most of the post-secondary institutions that host international and domestic student tourists are located in urban centres. It is distinct from other forms of alternative tourism in that few students who meet the World Trade Organisation definition of an 'educational tourist' intuitively identify themselves as tourists. Similarly, the businesses and organisations that have been spawned by international education are only tangentially associated with the larger tourism industry. Basic patterns of motivation are education, and learning and education tourism involves FIT travel arrangements, interactions with local residents, widely dispersed spatial distribution usually away from conventional tourism spaces and consumption of locally produced goods and services.

The Sharing Economy

Airbnb was launched in 2008 and in May 2017 the company was valued at $31b dollars US[56]. It is the most prominent example of a huge new 'sharing economy' where people rent beds, cars, boats and other assets directly from each other coordinated via the internet. Technology has reduced transaction costs, making sharing assets cheaper and easier than ever and therefore, possible on a much larger scale. At 30 June 2017, there were around 150 million users of Airbnb worldwide[57].

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[55] Wearing, S., (2001), 'Volunteer Tourism: Experiences that make a difference', CABI Publishing
[56] Statistica, (2017), *'Airbnb – Statistics and Facts'*, https://www.statista.com/topics/2273/airbnb/, website accessed 12 June 2017
[57] DMR (2017), 'Airbnb Statistics and Facts', http://expandedramblings.com/index.php/airbnb-statistics/, website accessed 12 June 2017

Airbnb is a consumer peer-to-peer model. 'Collaborative consumption' is a good thing for several reasons, owners make money from underused assets and creates social benefits as people meet by staying in homes[58]. The sharing economy is an example of the internet's value to consumers and this emerging model is now big enough and disruptive enough for companies to have woken up to it. That is a sign of immense potential and the long-term implications of this model on traditional accommodation markets is largely unknown.

Marketing and Creating Competitive Advantage

The tourism industry has been characterised by increasing competition. Destination management has emerged as an effective methodology to help tourism organisations in their effort to intensify marketing activities[59]. Importantly, the wide variety of organisations involved and the complexity of tourism products has rendered the coordination and cooperation among them a critical success factor. The Cradle Coast Authority as a destination management organisation is the umbrella organisation incorporating all stakeholder and has a crucial role in fostering the development of local tourism systems[60].

Information and communication technology (ICT) plays a key part in assisting operations with important functions both in networking of local organisations and in promoting destination brand and products on a global market[61]. The internet has obviously affected these activities strongly and many activities from traditional (mainly printed) media have been transferred to the internet.

Central Coast destinations need to differentiate their products and develop partnerships between the public and private sector locally in order to coordinate delivery. Taking advantage of new technologies and the internet also enables destinations to enhance their competitiveness by increasing their visibility, reducing costs and enhancing local co-operation. Regional destination marketing must lead to the optimisation of tourism impacts and the achievement of the strategic objectives for all stakeholders.

The Visitor Accommodation Strategy is underpinned by a number of strategic documents including the Central Coast Destination Action Plan; the Tourism Accommodation Supply Analysis: North West Tasmania; the Central Coast Cycling Strategy; Parks and Wildlife's Dial Range Master Plan; and the Leven Canyon/Leven Valley Master Plan. These strategies and plans provide strategic justification of the Visitor Accommodation Strategy as a resource to guide the Council and community to improve our accommodation provision, enhance the distinctiveness of our destinations and to build on our product development and marketing. Development of a Prospectus is the first stage in this journey. The Strategy can contribute to creating long-term resilience and competitive advantage for the local visitor economy for the benefit of all.

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[58] The Economist, (2015), *'The rise of the sharing economy'*, http://rachelbotsman.com/work/defining-the-sharing-economy-what-is-collaborative-consumption-and-what-isnt/, website accessed 16 March 2017

[59] Ritchie, J.R., and Crouch, G. I., (2010), *'A model of destination competitiveness/sustainability',* Brazilian Public Administration Review (RAP) 44(5), CAB International, pp. 1049-1066

[60] Bruhalis, D., (2000), *'Marketing the competitive destination of the future',* Tourism Management, 22(1), pp. 97-116

[61] Ritchie, J.R., and Crouch, G. I., (2010), see note 56