BRUNY ISLAND

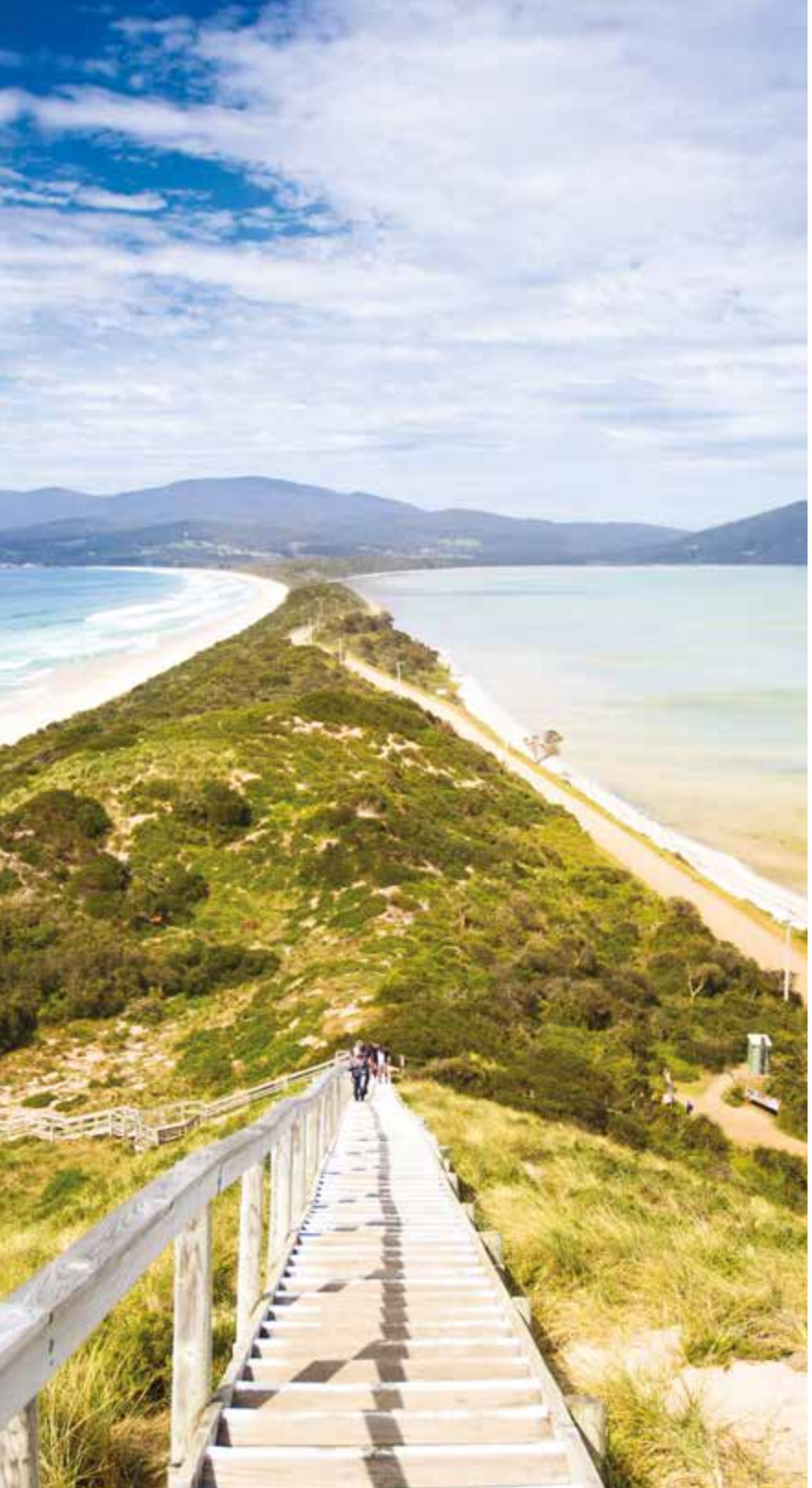
Destination Action Plan 2016–2018

August 2016

SUPPORTED BY

Tasmanian Government

DESTINATION SOUTHERN TASMANIA



Acknowledgments

The development of the Bruny Island Destination Action Plan has been facilitated by Destination Southern Tasmania (DST) with the support of the Department of State Growth (DSG).

The process brought together representatives from all stakeholder groups that contribute to and benefit from the visitor economy, local government, state government agencies, and the community (residents & business) to develop a Plan.

This is an action focused plan that identifies specific priorities and actions that if cooperatively acted on by stakeholders will contribute to the achievement of agreed objectives in the short term (rolling three years). As such the Plan does not purport to be a comprehensive strategic plan but is deliberately focused on identifying the key challenges and opportunities facing the destination and to establish achievable and affordable priorities and actions to address them. It is a 'bottom up' plan driven by the community (business and residents) while being cognisant of State and regional strategic plans and programs. For example, the Bruny Island Tourism Strategy (2011) updated by Kingborough Council (April 2016) is a complementary and valuable reference to this Destination Action Plan (DAP). The DAP builds on the Strategy by identifying specific priorities and actions for consideration and action over the next three years.

Destination Southern Tasmania would like to thank all who participated in the plan development process:

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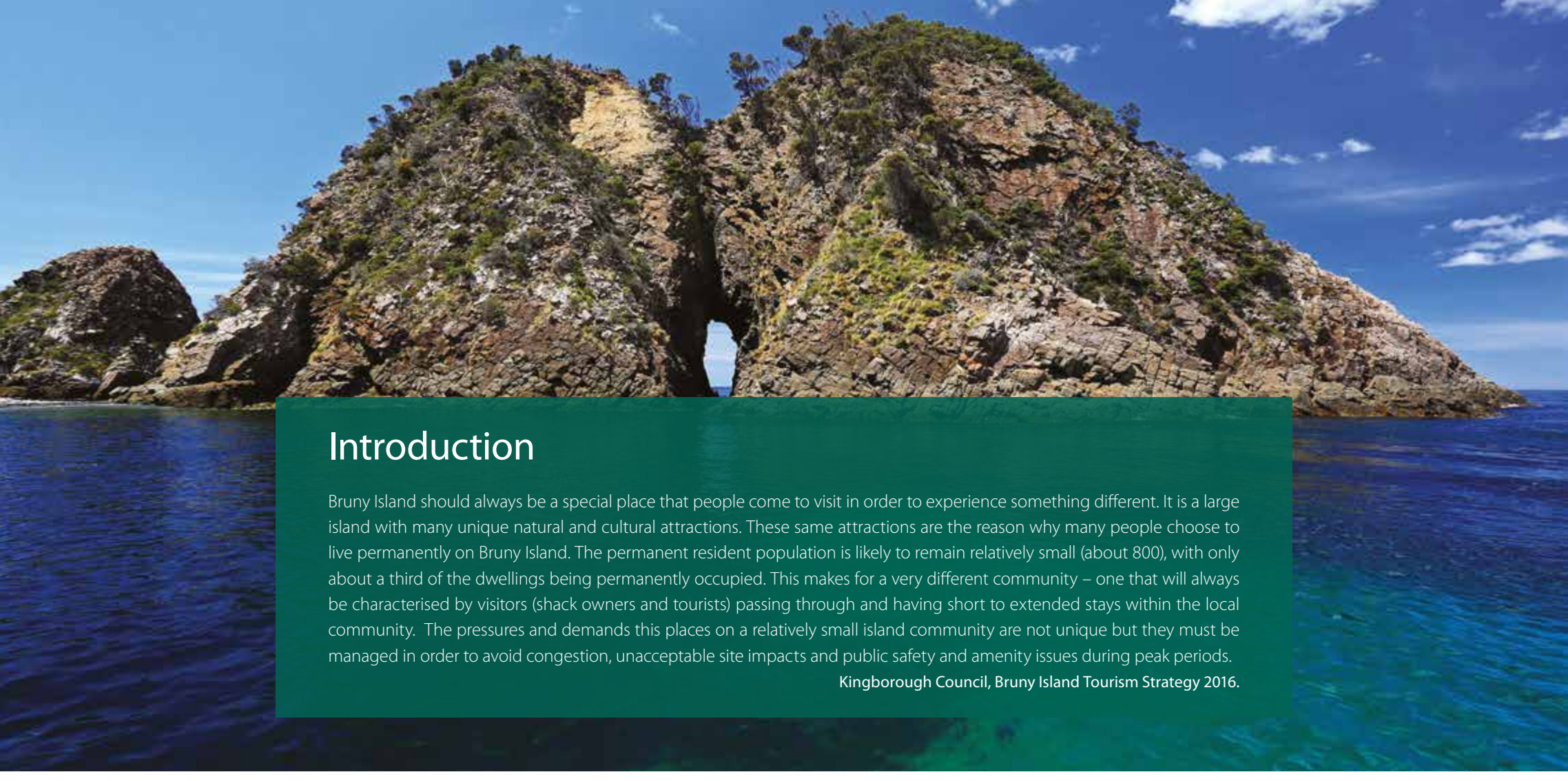


Introduction

Bruny Island should always be a special place that people come to visit in order to experience something different. It is a large island with many unique natural and cultural attractions. These same attractions are the reason why many people choose to live permanently on Bruny Island. The permanent resident population is likely to remain relatively small (about 800), with only about a third of the dwellings being permanently occupied. This makes for a very different community – one that will always be characterised by visitors (shack owners and tourists) passing through and having short to extended stays within the local community. The pressures and demands this places on a relatively small island community are not unique but they must be managed in order to avoid congestion, unacceptable site impacts and public safety and amenity issues during peak periods.

Kingborough Council, Bruny Island Tourism Strategy 2016.

This Destination Action Plan for Bruny Island identifies priority strategies and actions which if implemented over three years will enhance the region's position as one of Tasmania's most special visitor destinations. Destination Action Plans are an implementation initiative of the Tasmanian Visitor Economy Strategy 2015-2020 (T21), Priority 4 Building capability, capacity and community.

This Plan has been prepared by a facilitated workshop process involving community (residents and business) representatives who considered and reached consensus on destination development, marketing and management opportunities and challenges. The group then identified and agreed on the key priorities and actions that would make a positive difference to the sustainable growth of the Bruny Island visitor economy and experience, while also contributing to, or not adversely impacting on, sustainable environmental, social and cultural attributes of the Island.

The primary consensus of the workshop participants is to develop the quality of the visitor experience based primarily on the natural environment and cultural assets of the Island while managing and minimising the impact of visitation. The priorities and actions are therefore focussed on maximising visitor expenditure, dispersal and satisfaction and NOT increasing visitor numbers.

To achieve the desired outcomes, the Plan will require new levels of collaboration, communication and cooperation by the community (residents and business) driven by a shared vision and not sectional interests.

The visitor economy

Visitors to Bruny Island are substantial contributors to the local economy. Visitors include leisure tourists (intrastate, interstate and international), visitors to friends and relatives, non-permanent resident landowners, business visitors, students and day-trippers. Their expenditure is 'new money' contributed to the local economy which supports jobs and the provision of services, facilities and activities in the community.

Interstate and international visitors

In the year ending December 2015 Bruny Island attracted 111,000 interstate and international visitors, increasing 30% from the previous year. Nearly 30% of visitors stayed overnight, averaging 2.6 nights.

Intrastate visitors

Bruny Island received over 80,000 intrastate visitors (day and overnight) during 2015, with just over half staying overnight.

Total expenditure by visitors to Bruny Island is estimated to be $32,850,601*.

Employment*

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

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

Thirty-four percent of the 771 permanent residents on Bruny Island at the 2011 census indicated that they were employed. Of these, 30 persons indicated that they were employed in the Accommodation & Food Services sector. It is uncertain which category would have been chosen for those others who are employed in hire or tour services or the tourism related manufacturing and retail businesses. It is however clear from the Census that the most significant employment sectors on the Island are these various tourism related activities, plus public services, construction, agriculture and aquaculture (Kingborough Council Tourism Strategic Plan 2016).

Source: Tasmanian Visitor Survey year ending December 2015, International Visitor Survey year ending December 2015, National Visitor Survey year ending December 2015, Economic Impact Analysis in Tasmania's South 2013, Remplan.
*Expenditure figures are calculated based on average expenditure per night/day trip in Tasmania.

Objectives

The primary objective of this Plan is to improve the visitor experience of the Island's natural and cultural assets, increase visitor satisfaction, dispersal (geographic and seasonal), length of stay and visitor spend.

Therefore the priorities and actions proposed focus is on improving the visitor experience and positioning the Island as a quality nature based, heritage and living cultural destination with supporting infrastructure, products and services consistent with the demand and aspirations of specific interest target markets, rather than mass markets.

As a consequence this first three-year action plan does not prioritise marketing and is more supply rather than demand focused. In other words the focus is on progressively improving infrastructure, visitor experiences and services rather than increased marketing to attract more visitors.

That said, managing visitation growth and attracting the desired market will require careful consideration of the positioning, brand, product, pricing, promotion and distribution relevant to target markets. Targeting higher spending visitors and offering appropriately priced quality products and services will act as a brake on volume visitation growth. This will require engagement and cooperation with Destination Southern Tasmania and Tourism Tasmania to develop and implement a strategically targeted cooperative marketing plan.

As a foundation to managing desired future visitor numbers, the key objective of this Destination Action Plan is to progressively develop the visitor infrastructure, product and services to competitively deliver the visitor experience expectations of higher spending target markets.

Our opportunities

A better visitor experience:

- Leverage off ferry terminal. Provide a gateway orientation experience. The ferry access point also provides the opportunity to capture data on visitor movement.
- Infrastructure to meet visitor and community needs. This includes upgraded facilities at icon areas such as The Neck.
- Product development to support brand:
  - Walking trails
  - Adventure product/experiences
  - Artist product development/festivals/artist in residence/arts experience
  - Small niche opportunities/meet the local/birdwatching
  - Murrayfield walking trail potential and other experiences
  - Paddock to plate opportunities e.g. Bruny Island Cheese
- Coordinated signage and interpretation strategy. Interpret endangered and threatened species on island, utilising innovative approaches where appropriate e.g. Bruny Island Cheese bird signage.
- Whole of island WiFi hot spot.
- Enhanced access to the Island: existing ferry, internal transport by land and sea, ferry direct from Hobart (service standards and pricing matched to target market demand).
- Professional development of visitor services and experiences through consistency of product offering, including fresh produce and service quality.

Resourcing:

- Explore grant funding opportunities to improve infrastructure and drive investment further.
- Alternative funding sources to become more self-reliant:
  - Community bank used by local businesses to fund marketing etc on island
  - User pay opportunities
  - Public private partnerships
  - Crowd funding for conservation and interpretation projects
  - Events to support community fund raising.

More involvement from community and visitors:

- Volunteering: involve visitors in environmental conservation and interpretation activities.
- Local ambassadors.
- Various stakeholders to work together to achieve outcomes i.e. business and resident organisations, local government, regional organisations and state government.
- Community understanding the value of tourism.

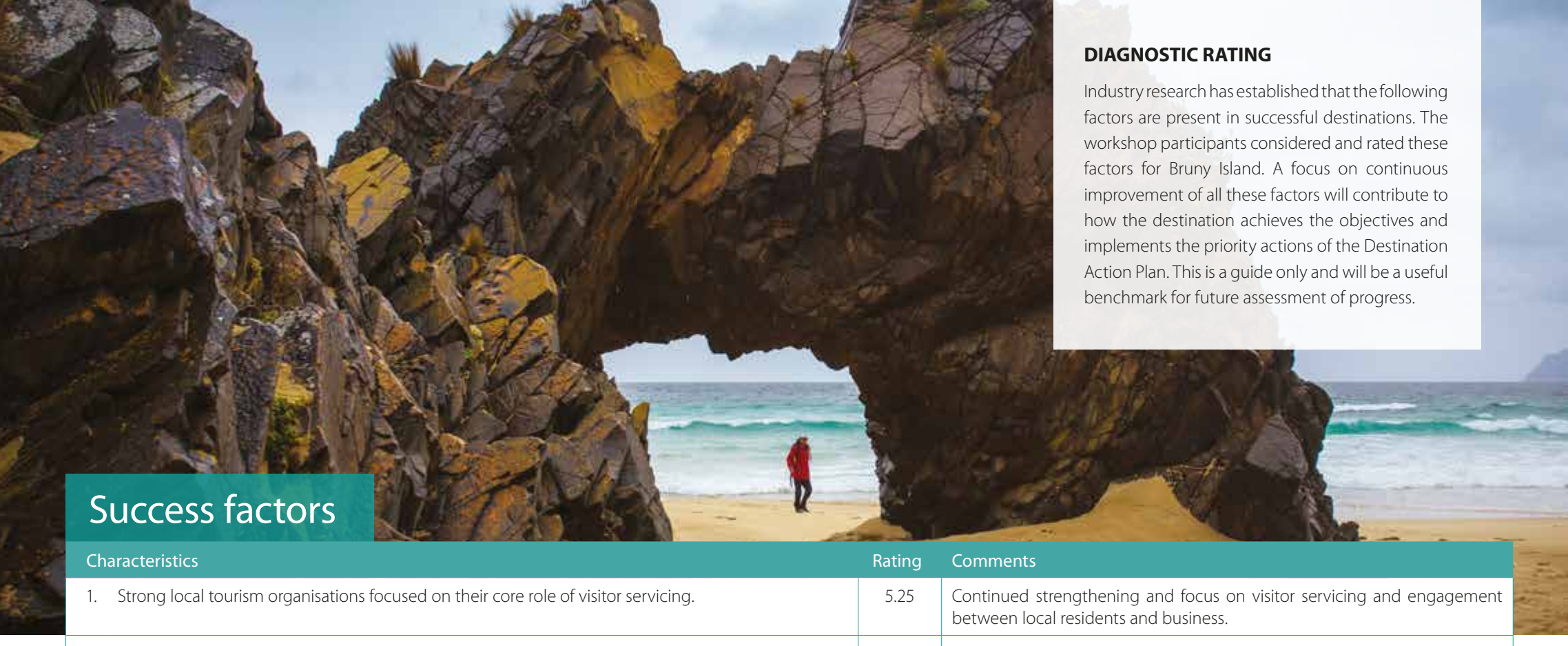
Coordinated marketing:

- Leverage off Destination Southern Tasmania's assets and contract with Kingborough Council to create marketing efficiencies.
- Reflect cultural needs of visitors.
- Consistent Bruny Island branding.
- Local produce promotion.
- Create shared database of visitors for whole of community marketing purposes.
- Research the value of tourism through operator barometer.
- Addressing length of stay and seasonality issues.

UNESCO biosphere proposal

Our challenges

- Managing visitor capacity and resident needs must take into account the economic, social, cultural and environmental sustainability of the island. Seek to understand what visitor volume can be sustained and how to manage the impact of this activity effectively, including how 'well targeted and managed' tourism can be achieved.
- Accommodating environmental sustainability and future climate change.
- Access: a reliable ferry service and providing other access points to meet visitor and resident demand.
- Visitor infrastructure to match visitor expectations, including the ferry, safe roads, facilities, signage, plus having sufficient resources to provide and maintain this infrastructure.
- Managing negative community sentiment towards tourism and encouraging a shared community vision focussed on maximising the positive benefits from tourism to the community.
- Illegal and inconsistent signage damages brand and impacts on visitor experience. It is important that signage regulations are enforced.
- Ageing population impacts on availability of volunteers and ambassadors which impacts on services to visitors in peak periods (e.g. ambulance).
- Ensuring tourism providers have quality assurance programs supported by trained staff.
- Land use (State/Local) planning and associated regulation needs to provide for development that suits community and visitor expectations.
- Need for visitors and residents to understand and respect the fragile environment.
- Collaborative community engagement (residents and business) to agree and support shared economic, environmental, social and cultural goals. Business and resident groups to communicate and work together.
- Consistent Bruny Island brand, including better promotion and communication to target visitor market segments.
- Preventing the exploitation of the Bruny Island brand.
- Increase yield (visitor expenditure) to island, converting more day trip to overnight visitors.
- Encouraging public/private investment partnerships, with less reliance on government.
- There is limited electricity supply and a reliance on diesel generators.
- There is limited water supply and no reticulated water.



DIAGNOSTIC RATING

Industry research has established that the following factors are present in successful destinations. The workshop participants considered and rated these factors for Bruny Island. A focus on continuous improvement of all these factors will contribute to how the destination achieves the objectives and implements the priority actions of the Destination Action Plan. This is a guide only and will be a useful benchmark for future assessment of progress.

Success factors

Characteristics	Rating	Comments
1. Strong local tourism organisations focused on their core role of visitor servicing.	5.25	Continued strengthening and focus on visitor servicing and engagement between local residents and business.
2. Strong regional tourism organisations focused on their core role of regional marketing and development.	6.67	Facilitation support for infrastructure, product and visitor experience development. Strategic marketing to target high yield markets.
3. Local Government support.	5.4	Continued engagement and support. See note below.
4. Strong, consistent and effective leadership by individuals or organisations	6.95	Encourage and support.
5. Strategic planning for the region with economic, social, environmental and cultural objectives supported by local destination plans.	5.00	In progress.
6. Consistent visitor service excellence.	2.95	Needs priority attention.
7. Research driven cooperative marketing.	4.17	Cooperative with Destination Southern Tasmania.
8. A breadth and depth of tourism infrastructure, experiences and events matched to market demand.	4.21	Opportunity to develop to match target market demand and community value.
9. Risk management plans in place.	3.17	Needs attention to consider the visitor.
10. Supportive communities that collectively value tourism.	4.45	Needs continuous attention to engagement, collaboration, communication and shared vision.

Experience has demonstrated that consistently high performing destinations usually score above 7 on most self assessed measures.

Action Plan implementation

The following Action Plan outlines priorities and actions as a guide for stakeholders to collaboratively and cooperatively implement the Plan. To facilitate this, an Implementation Steering Group of representatives will be formed. A key consideration will be the availability and securing of resources to progress the implementation of the Plan in a timely manner. It may also be appropriate and necessary to involve other organisations and to seek funding for specific projects. The Plan does not commit any organisation to the actions proposed but is a guide to pursuing priorities and actions which will make a positive difference to the achievement of the tourism objectives noted above.

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

HIGH	within the first year
MEDIUM	within one to two years
LOW	within three years

A review of progress of implementation of the Plan will be undertaken annually by Destination Southern Tasmania in consultation with the Implementation Steering Group. This may result in a revision and updating of the Plan. A new plan will be prepared in three years.

The following organisations have been identified to have a role to consider the Destination Action Plan and to progressively work together to implement the priority actions. This may include nominating representatives to form the core of an Implementation Steering Group or being involved in specific projects. The Implementation Steering Group should act to keep all of these groups informed of progress and engaged as required.

- Bruny Tourism Inc. (BTI)
- Kingborough Council
- Tasmanian Parks and Wildlife (PWS)
- Department of State Growth
- Tourism Tasmania
- Bruny Island Advisory Committee to Kingborough Council (BIAC)
- Friends of North Bruny
- Bruny Island Environmental Network
- Bruny Island Historical Society
- Bruny Island Arts Inc
- Bruny Island Community Association (BICA)
- Bruny Island Primary Industry Group
- Friends of Adventure Bay
- Murrayfield
- Bruny Island District School
- Community Health Centre
- Bruny Island CWA
- Bruny Island SES.

Action Plan implementation cont.

BRUNY ISLAND TOURISM STRATEGY

In addition to the input from the workshop process, the following action plan draws on the Draft Bruny Island Tourism Strategy prepared by Kingborough Council (reviewed April 2016).

The Strategy is a valuable and useful reference that should be considered in implementing this Destination Action Plan. This Plan is focussed on actions that will help to meet objectives outlined in the Tourism Strategy. The documents complement each other and should not be treated in isolation.

It should also be noted that Kingborough Council, Department of State Growth and Tasmanian Parks and Wildlife have a program of planned and budgeted improvements to the infrastructure of Bruny Island that will contribute to the visitor experience as well as the local community.

The following is a summary of planned works for Bruny Island for 2016/2017:

- Construction of new public toilets at Alonnah during 2016/2017. Pedestrian path to be constructed at Adventure Bay, extending the existing path on the beach-side of Adventure Bay Road.
- Upgrading (resheeting) the Lighthouse Road (south from Lunawanna) and the Cloudy Bay Road.
- Maintenance of the Bruny Island Main Road.
- Department of State Growth is developing a coordinated road infrastructure plan for Bruny Island. Initial investigations have been carried out into what is required to upgrade and maintain the gravel roads within the national park and the State forests.
- Department of State Growth is to seal the gravel section of the Main Road on the Neck. Kingborough Council has been commissioned to install tunnels under the existing road for the penguins on a trial basis.
- Tasmanian Parks and Wildlife are replacing the lookout walkway at the Neck and the public toilets and providing a proper parking area. This will be a major tourism attraction and will incorporate protection for the penguins and interpretive information.
- Tasmanian Parks and Wildlife are providing new facilities at the Lighthouse, including public toilets, parking and visitor amenities. New public toilets are also being provided at Cloudy Bay.
- Kingborough Council has also recently upgraded the waste transfer station and this will continue in 2017. A waste management strategy is to be prepared in 2016/17 and this will consider the particular needs of Bruny Island.

PRIORITY 1
Infrastructure development (to support the visitor experience)

Actions	Participating organisations	Priorities
1. Undertake an audit of visitor infrastructure to identify maintenance, renewal and development needs and priorities. Consider: ▪ Essential services to support visitors including ambulance ▪ Roads ▪ Walking tracks and trails ▪ Parking ▪ Wayside stops ▪ Viewing platforms and interpretation ▪ Cycle ways ▪ Toilets ▪ Rubbish management ▪ Jetties, boat ramps and moorings ▪ Footpaths ▪ National Park visitor services ▪ Telecommunications ▪ Access to key sites ▪ Information services ▪ Water ▪ Electricity ▪ (Reference: Section 2.5 Draft Bruny Island Tourism Strategy) Note the 2016-17 program of works planned by Kingborough Council (See above) DSG and PWS. 2. Determine priorities and seek to secure resources and commitments from Kingborough Council and State Government agencies. 3. Consider access development needs and opportunities: ▪ Airstrip upgrade ▪ Water Taxis ▪ Ferry services and facilities. **Note:** Community advocacy is a priority to inform the ferry contract due for renewal in 2018 ▪ Internal transport options.	Kingborough Council, BIAC, DSG, PWS, BICA	High

PRIORITY 2
Industry and community collaboration and leadership

Actions	Participating organisations	Priorities
1. Establish a Destination Action Plan Implementation Leadership Group (Steering Committee) to lead the implementation of this Plan. ▪ Consider a community (business and residents) launch of the Plan ▪ Identify 2-3 actions for immediate implementation in the first year and apply a sound project management process ▪ Implement a communications plan to keep all stakeholders engaged and informed of progress ▪ Encourage Kingborough Council to endorse the Plan and to participate in the Implementation Leadership Group ▪ Bruny Tourism Inc. and appropriate community groups to endorse the Plan and participate in the Implementation Leadership Group or specific projects.	DST, BTI, Kingborough Council	High
2. Bruny Tourism Inc. to establish regular industry and community networking events to facilitate collaboration and cooperation including exchange of ideas, issues solutions and project implementation. This can include the current collaborative work between Destination Southern Tasmania and Kingborough Council.		
3. Establish an annual industry and community forum to consider the status of the visitor economy (information sharing), celebrate industry and community leadership contributions, progress updates and review of the Destination Action Plan and to progress collaborative projects such as: ▪ Conservation projects ▪ Interpretation and information provision ▪ Community engagement ▪ Community and visitor services ▪ Heritage and culture stories ▪ Special events	Village Well, DSG, Kingborough Council, DST – Bruny Island case study	In progress
4. Consider outcomes of the state-wide visitor engagement project and identify opportunities for Bruny Island tourism and community partnership development to enhance collaborative leadership to increase visitor experience and community benefit.		

PRIORITY 3
Product development

Actions	Participating organisations	Priorities
1. Undertake an audit of accommodation, attractions and visitor services (including hospitality provision), to identify gaps and opportunities. Consider visits to other like destinations. Prepare a prospectus of development opportunities and work with Destination Southern Tasmania to advocate and facilitate in collaboration with State Government. 2. Continuously develop Bruny Island produce offerings and experiences: ▪ 'Meet the producer' experiences ▪ Food trail ▪ Special events ▪ Off Island promotions. 3. Consider the development of a public/private operated Bruny Island Visitor Orientation/Interpretation/Experience Centre as an attraction to interpret Island biodiversity, produce, heritage and visitor services, supported with retail and hospitality services.	Kingborough Council, DST, BTI	High

Note: The development of a unique, market competitive positioning and brand for Bruny Island (supported by the community – businesses and residents) is an essential foundation initiative. This will guide tourism development, marketing and management collaboration and cooperation.

Destination Southern Tasmania is in progress of working with Kingborough Council on destination branding to leverage off Hobart and Beyond positioning.

PRIORITY 4
Sustainable destination positioning

Actions	Participating organisations	Priorities
1. Develop and consistently promote a unique market positioning and brand identity for Bruny Island. 2. In consultation with key stakeholders undertake a destination positioning identification process with consideration of: ▪ Unique Island attribute ▪ Natural assets ▪ Environmental values/biodiversity ▪ Cultural and heritage assets/diversity ▪ Island produce ▪ Island lifestyle. 3. Develop a Bruny Island brand style guide and encourage all businesses and organisations to use consistently. 4. Incorporate the positioning and brand in Destination Southern Tasmania and Tourism Tasmania marketing strategy and communications. 5. Scope a distinctive signing plan consistent with the positioning and brand to refresh and upgrade all Island signing and interpretation, including a distinctive welcome sign statement as a photo point for visitors. Note: This also provides an opportunity to 'educate' visitors to respect the Island community values. 6. Support the 'Island/sustainability/nature based 'positioning by: ▪ Considering the 'Conscious Travel' market segment trend and philosophy to guide destination and experience development and visitor hosting. (Refer Anna Pollock 'The Conscious Traveller') ▪ Encourage business and experience eco and general tourism accreditation ▪ Review land use planning schemes to ensure that new development proposals are low key and consistent with the Bruny Island character and positioning. ▪ Pursuing the proposed Unesco Biosphere application ▪ Featuring and promoting local produce in hospitality offerings. This may include Bruny Island produce branding for local provision and Island exports.	Kingborough Council, DST, BTI, BICA, PWS	High

PRIORITY 5
Visitor management

Actions	Participating organisations	Priorities
1. Research visitor travel movements to determine origin of visitors, sites visited, expenditure, location and adequacy of visitor services. Consider opportunities for improvements and value adding to increase length of stay, dispersal, expenditure and satisfaction. This could be undertaken by an ongoing survey of visitors and/or use of the SenseT project. 2. Consider opportunities to diversify visitor access. (Refer Action 2.3) 3. Review the provision of visitor information to determine accuracy, consistency, adequacy, distribution gaps, visitor reviews and feedback, and consistency relevant to refreshed positioning. Consider current provision and opportunities for improvement or development. ▪ Bruny Island website ▪ Printed collateral ▪ Online tourism review sites ▪ Mobile apps ▪ WiFi. 4. Review, develop and progressively implement a contemporary best practice way finding, safe travel, visitor precinct and location information and interpretation signing system throughout the Island. Note: Tasmanian RTO's are currently undertaking a visitor engagement project which will provide future direction opportunities. 5. In collaboration with Department of State Growth, develop and implement a cooperative marketing strategy (brand and tactical, product, price, promotion and distribution) including identification of target markets (high yielding) matched to Bruny Island positioning. 6. Consider and integrate visitor risk management into Kingborough Council disaster management planning. This to include Bruny Island business and community awareness, education and training. 7. Develop and implement a visitor service excellence program with the objective of creating a competitive advantage of visitor satisfaction from seamless visitor service excellence. Measure, monitor, communicate and continuously improve. Consider 'Conscious Host' training. 8. Consider development of a 'Volunteer Visitor' program for conservation projects. 9. Consider opportunities to improve the Ferry Terminal visitor experience as the major arrival, gateway and departure experience. Advocate to Department of State Growth for inclusion in Ferry contract. This will be informed by the Visitor Engagement Project funded by Department of State Growth.	Kingborough Council, DST, BTI, DSG, BICA	High-Medium

PRIORITY 6
Resourcing

Actions	Participating organisations	Priorities
1. As an output of Priority 1, prepare a 'Priority Projects Action Plan' supported by appropriate business costing and business cases. The Plan to include public infrastructure maintenance, renewal and development. Identify potential government grant programs, prepare applications and implement a coordinated advocacy program. 2. Prepare an 'Investment Prospectus' of product development opportunities for attraction of public and private investment for renewal and development of accommodation, attractions and services consistent with the Bruny Island positioning and to fill well researched demand gaps. 3. Undertake an independent economic analysis of the Bruny Island visitor economy to support attraction of public and private investment. 4. Undertake research of 'user pays' models and opportunities. Investigate: ▪ A Bruny Island Pass – packaging of the Island experiences and services ▪ Public land/site access fees ▪ Visitor volunteers for conservation projects (Refer Priority 3.8) ▪ Value added 'exclusive' experiences ▪ Crowd funding for conservation or product development projects ▪ Support and encourage small group tours to limit visitor vehicle traffic and to enable support of local providers and facilities. 5. Consider the development, sale and distribution of unique Bruny Island merchandise. 6. Subject to success of a Unesco Biosphere application, seek federal development funding. 7. Investigate opportunities to engage tertiary students in research, visitor servicing, IT and interpretation design projects. 8. Investigate establishing a Community Bank and the opportunity to support local projects relative to this Destination Action Plan.	Kingborough Council, DSG, DST, BTI, PWS, BICA	High-Medium-Low