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Final Draft for Stakeholder Consultation

# **TRIABUNNA-ORFORD AND MARIA ISLAND (TOMI) VISITOR PLAN**

Prepared for Glamorgan-Spring Bay Council in conjunction with  
Tasmanian Parks and Wildlife Service, Tourism Tasmania, Orford/Triabunna Chamber of Commerce  
and the Freycinet Coast Tourism Board



Maria Island, Oil on Canvas 2006, Sarah Weaver

<http://weavereye.net/gallery.php>

inspiring place



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## **S U M M A R Y**

### **1. PURPOSE OF THE VISITOR PLAN**

The purpose of the project is to “deliver a best-practice visitor plan for the Triabunna Orford Maria Island TOMI) area.

Importantly, the Plan is to be “innovative, forward-thinking, and market-led”, driven by sustainability, a strong desire to develop and support local industry and business, create jobs for local people, and contribute to community building in the area. It is to provide a strategic direction that is environmentally sustainable, financially viable, and socially acceptable.

The Plan is a joint project between Glamorgan Spring Bay Council, Tourism Tasmania, the Tasmanian Parks and Wildlife Service, Orford/Triabunna Chamber of Commerce and the Freycinet Coast Tourism Board.

### **2. THE CURRENT VISITOR EXPERIENCE**

The current visitor experience has been defined by research, site visits and consultation with the local tourism industry and community who attended an experience workshop (see Table 2.1). This is based on the layers of an experience set out in the Tasmanian Experience Model<sup>1</sup>, being:

Interpretation;  
Services;  
Tours, Activities and Attractions;  
Infrastructure; and  
Place

To maximise the experience, each of the layers must deliver consistent quality that is targeted to the needs of the market.

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<sup>1</sup> Tourism Tasmania 2002. The Tasmanian Experience ; Creating unforgettable natural experiences.

<p style="text-align: center;"><b>INTERPRETATION</b></p> <ul style="list-style-type: none"> <li>• Interpretation on Maria Island - information panels, Discovery Ranger program, and Coffee Palace</li> <li>• Interpretation provided by guides on tours and ferry service (e.g. about Spring Bay Mussels operations)</li> <li>• Limited interpretation of historic buildings in Triabunna – information panels</li> </ul>
<p style="text-align: center;"><b>SERVICES</b></p> <ul style="list-style-type: none"> <li>• Triabunna Visitor Information Centre</li> <li>• Maria Ferry Service</li> <li>• Range of basic services (e.g. retail, information, internet, ATM/banking, post, food and beverage)</li> <li>• East Coast Cruises shuttle bus service – public transport to the area generally limited</li> <li>• Quality restaurants and cafes</li> <li>• Medical services – two local doctors in Triabunna and Health Centre, paramedics)</li> <li>• Online Access Centre</li> </ul>
<p style="text-align: center;"><b>TOURS, ACTIVITIES AND ATTRACTIONS</b></p> <ul style="list-style-type: none"> <li>• Maria Island Ferry</li> <li>• Maria Island Walk – award winning nature-based tourism product</li> <li>• East Coast Cruises - One Day on Maria, Maria Island Eco Cruise, and Wilderness to Wine</li> <li>• Tasmanian Bushland Garden</li> <li>• Other East Coast tours that may stop and pass through the area</li> <li>• Darlington Vineyard</li> <li>• Wielangta Forest Drive</li> <li>• Dive wreck – the Troy D</li> <li>• Caravan park</li> <li>• Camping opportunities</li> <li>• Tasmanian Seafarers Memorial</li> <li>• Independent recreation and nature-based activities – walking, cycling, fishing and water sports, diving, kayaking, boating/sailing etc</li> <li>• School group facilities (e.g. Gumleaves, Spring Beach Youth Convention Centre, and Maria Island campground)</li> <li>• Tas Air Scenic Flights – Maria Island and surrounds</li> <li>• Trout Fishery and Sporting retreat (Twin Lakes) and Redbanks Fish and Field Outdoor Experience</li> </ul>
<p style="text-align: center;"><b>INFRASTRUCTURE</b></p> <ul style="list-style-type: none"> <li>• Roads – some in better condition than others (e.g. the gravel surface of Wielangta Road may deter some visitors with hire cars)</li> <li>• Town service centres at Triabunna and Orford (may be water and sewer capacity limitations in some places)</li> <li>• Range of accommodation types (although limited high end)</li> <li>• Port/mooring facilities – currently limited with minimal capacity for visiting vessels</li> <li>• Boat ramps</li> <li>• Sport and recreation facilities – golf course, bowls club, shooting clubs, tracks and trails (including coastal paths, 4WD, and the Old Convict Road)</li> <li>• Day use areas – picnics, barbeques</li> <li>• Basic visitor infrastructure on Maria Island – camping, toilets, walking tracks</li> <li>• Air strip on Maria Island</li> <li>• Black water dumps for motorhomes in Triabunna and in the caravan park</li> </ul>
<p style="text-align: center;"><b>PLACE</b></p> <ul style="list-style-type: none"> <li>• Maria Island National Park (World Heritage Area) and Marine Protected Area (Maria Island Marine National Park)</li> <li>• 'World-class' marine environment and coastline - recreational and commercial fishing, diving, water sports and activities</li> <li>• Working port</li> <li>• Beaches - family friendly and easily accessible</li> <li>• Shack/holiday home culture – coastal lifestyle activities</li> <li>• Natural environment – marine and coast, inland forests (e.g. Wielangta), wildlife, habitat of threatened species</li> <li>• Strong cultural heritage – both European and Aboriginal (convict history on Maria Island, boat building and sandstone quarrying, buildings/structures, and the oldest stained glass window in the Southern Hemisphere in the Buckland Church)</li> <li>• Local industries – aquaculture, seafood, Darlington Vineyard, agriculture</li> <li>• Small-scale settlements and low-level development – 'slower pace lifestyle'</li> <li>• Maritime climate</li> <li>• Proximity to Hobart and Port Arthur</li> <li>• Gateway/entry to the East Coast</li> <li>• Art and craft – galleries, local artists</li> <li>• Spring Bay – only 'all weather' port on East Coast</li> <li>• Local seafood (e.g. Spring Bay Mussels)</li> <li>• Buckland Church</li> </ul>

### 3. TOURISM TRENDS

The broader tourism trends and challenges that will influence and impact on visitation to Tasmania, and within the TOMI area include:

- increasing affluence in developing countries;
- projected increases in international travel (including strength of the Australian dollar);
- low cost airlines;
- decline in domestic travel;
- rising oil costs (vulnerability of the tourism industry to oil price increases);
- environmental awareness and demand for sustainable tourism;
- climate change;
- an ageing population;
- increased technology sophistication and personalisation; and
- increasing demand for authentic, personalised and experience-rich tourism.

Research into the visitor market for the TOMI area indicates:

- in the last three years, the market share of total visitors (interstate and overseas) to Orford as a percentage of the total visitors to the East Coast Region have declined from 48.5% to 38.4%;
- over the same time period, the market share of total holiday visitors to Orford as a percentage of the total holiday visitors to the East Coast Region have declined from 48.9% to 39.1%;
- total arrivals to Maria Island (Darlington) by ferry has declined from a peak in 2004/05 of around 15,000 persons to around 8,000 in recent years; and
- the whole of the East Coast region has accounted for about 5-6% of total intrastate day trips over the last 5 years and between 13-16% of the total Intrastate overnight trips within the State.

## 4. DESIRED FUTURE VISITOR EXPERIENCE

The basis for a desired future visitor experience in the TOMI area is presented in the following table.

Core Elements	Brief summary of the Current TOMI Visitor Experience	What visitors want.....	Desired TOMI Future Visitor Experience
Interpretation	Limited use of interpretation, dated media (e.g. information panels) with the exception of the personalised tours provided by Maria Island Walk and East Coast Cruises	Engagement	There are clear, strong, consistent and engaging messages about the TOMI destination that are delivered through a range of different media and targeted to different customer markets. The interpretation delivery allows visitors to engage with the local community, to learn about the natural and cultural values in a meaningful way (i.e. not just facts and figures), and provide a contrast to their daily life experiences. It builds a desire for return visits, and a 'braggability' factor.
Services	Basic services limited in part by the small visitor market, limited viability and strong market seasonality rather than serving customer need.	Personalised	Improvements to the visitor services and infrastructure (e.g. roads, ferry and public transport, jetties, toilets, visitor signs and information, and recreation trails) that will add value to the tour services. Regular, reliable and viable services to cater for the seasonal visitor market, including public transport from Hobart.
Tours, activities and attractions	Small range of tours and activities - Maria Island Walk being the leading tourism product currently within the destination. Maria Island's potential as a leading nature-based and cultural heritage tourism destination is not currently being realised. Limited take-up of visitor activities and tours despite diversity of place values.	Accessible, personalised, authentic, value and engaging	An increase in the choice and price-point for a range of tours, activities and attractions that will allow increased visitors to access and enjoy the destination. Tours, activities and attractions that deliver on brand perceptions. The motivational research study suggests the scope to build appeals around coastal nature, heritage and possibly wilderness within TOMI. Well-presented and self-guided journeys that are linked to products and the destination. Visitor market to have sufficient mass to support the viability of existing and new product.

Core Elements	Brief summary of the Current TOMI Visitor Experience	What visitors want.....	Desired TOMI Future Visitor Experience
Infrastructure	Core basic infrastructure in place (roads, services, accommodation, visitor facilities, tracks and trails) but major stop-gaps to deliver capacity for visitor growth to the destination e.g. Wielangta Road, ferry service, Maria Island jetty, dredging of Triabunna marina, and accommodation capacity.	Quality	High standard infrastructure that is relevant to the target market, and reflects the local sense of place. Improved infrastructure to facilitate better connections with other destinations (e.g. Hobart, Tasman Peninsula, East Coast) and to access core attractions (Maria Island). Broader range of quality accommodation choice. Infrastructure to comply with all the legislative, planning and environmental requirements.
Place	Strong place values (both natural and cultural) with Maria Island National Park and 'pristine' coastal waters being leaders. Recent World Heritage Area listing for the Darlington convict site on Maria Island. Coastal lifestyle.	Connection	The distinctive place values are sustainably managed, marketed and promoted to under-pin the destination, and form the basis for the development of engaging experiences.

## 5. MAJOR INHIBITORS TO TOURISM GROWTH IN THE TOMI AREA

A number of major inhibitors affecting tourism growth within the TOMI area have been identified. These are not new issues but rather challenges that have been evident to many people within the tourism industry and government for some time. The major 'inhibitors' for the destination are considered to be:

- Limited competitiveness of the destination
- Unsustainable ferry service
- Gaps in Infrastructure and visitor services
- Resource and management limitations
- Legislative and policy requirements

## 6. TOMI AREA TARGET MARKETS

The following key target markets are considered to be compatible with the TOMI visitor experience in the short-medium term. Encouraging growth in these markets is considered to be the best prospect for strengthening the tourism industry in the area, based on research, consultation and the strategic assessment undertaken, and include:

increasing the day visitor market to Maria Island;

greater conversion of the visitors passing through the area (interstate and international) to the East Coast region to stop and staying longer (including overnight stays) and spend more within the TOMI area;

school groups and friends/family market (mainly intrastate market) to Maria Island; and

the camping/caravan/motorhome market.

This does not imply that other visitor markets should not be pursued but rather that these target markets offer real potential for growth in the TOMI area.

## 7. THE VISION FOR TOMI

The proposed vision statement is:

***The TOMI area will become a strong visitor destination, through the delivery of well-developed infrastructure, visitor facilities and services that support market-leading experiences to create growth in visitor numbers, yield and local employment and skill development.***

## 8. STRATEGIC FRAMEWORK: GOALS AND STRATEGIES

In order to realise the vision, a number of goals have been developed for the TOMI area, to aid in positioning a stronger visitor destination that will deliver significant social, economic and environmental benefits to the community in the long-term

The goals are:

Destination Goal	Objective
Governance	Develop the capacity to effectively manage the destination on a sustainable basis.
Development	Fix infrastructure gaps and lead with memorable visitor experiences, facilities and services to drive increased visitor numbers, longer stays and greater yield within the destination.
Marketing	Promote and market tourism both within and outside the destination to attract and influence key visitor markets.

Strategies for each of these goals are presented below. These provide a range of desirable actions that could be taken to help achieve the vision.



Goals	Strategies
<b>Destination Governance</b>	A new management partnership arrangement with the PAHSMA be considered for the Darlington precinct in Maria Island National Park.
	Increased resources to facilitate sustainable nature-based and cultural-based tourism development, and sustainable management of the natural and cultural values of the destination.
	Involve all key stakeholders in the implementation of the TOMI Visitor Plan.
	Review existing statutory controls affecting tourism development, including Council's planning scheme, management plans and policies.
	The existing Project Steering Group continue to meet to aid the implementation of the Visitor Plan, and ensure consistency among the stakeholder organisations responsible for the various actions.
	Investigate the opportunities to obtain funding to employ a part time project manager to oversee the initial implementation of the Visitor Plan, including coordination of the Steering Group.
<b>Destination Development</b>	Adopt a tourism development framework for the TOMI area incorporating destination 'elements', 'gateways', 'hubs', 'touring journeys', 'experience tours'.
	Undertake a review of the market needs and requirements (e.g. a business case) for a Government assistance/support package based on a fees-for-service model for the Maria Island ferry service. Revitalise and transform the town of Triabunna as a major service hub for the TOMI area that will attract higher visitation, encourage longer stays and increase yield.
	Upgrade the Wielangta Road experience (e.g. improved signage, low-key visitor facilities, interpretation, and improve the road surface).
	Upgrade the Darlington jetty and associated visitor facilities on Maria Island.
	Identify visitor infrastructure and services improvements that could be sensitively introduced to Maria Island.
	Resolve the ongoing dredging issues with access to the Triabunna wharf/marina area
	Support the implementation of proposed tourism projects that have the potential to be a major development catalyst for the local tourism industry.
	Support and encourage the development of quality food and beverage services within TOMI.
	Encourage the building of existing tour products and new products that are strongly aligned with the Tasmania and regional tourism brands.
	Continue to support and encourage the development of new visitor facilities, tour products and activities
	Prepare a thematic interpretation strategy for the Tasmanian WHA convict heritage sites
	Implement the Freycinet Cycling Strategy

Goals (cont)	Strategies (cont)
	Support training, accreditation, business skills, marketing and interpretive skills development within the TOMI area.
	Work with the Tasmanian Aboriginal community to explore the opportunities for an Indigenous tourism product on Maria Island.
	Identify suitable sites to better cater for the demand of the growing numbers of caravan, camping and motorhomes visiting the TOMI area.
	Establish working party with education representatives to improve resources to better meet the needs of school groups to Maria Island.
	Foster opportunities for increased residential and holiday home development within the TOMI area that will support local businesses and spend.
<b>Destination Marketing</b>	The local tourism industry become fully committed to buy-into and support for the TOMI area as part of the successful and well-developed Freycinet destination branding and marketing strategy in the short to medium term.
	Consult with the Hobart and Surrounds Marketing Group about co-operative marketing opportunities.
	Ensure that the TOMI area has a well-designed and integrated internet presence.
	Focus on re-building and developing the Maria Island experience to better cater for the key target markets; day visitor market, school groups, independent/self catering adventure (including backpackers) and family/social group market (mainly intrastate).
	Explore the opportunities to package Maria Island (e.g. Darlington Precinct) as part of the Tasmanian Convict Sites WHA.
	Assess the opportunities for developing and promoting the use of Maria Island National Park and Marine Reserve for education, research and volunteer conservation programs.
	Investigate opportunities to enhance the role of the Visitor Information Centres in the marketing of the area.

## 9. ACTION PLAN 2011-2012

It is recognised that implementation of the recommended strategies will be very much dependent upon political commitment, the level of industry support, available resources and funding and the opportunities to tap into outside funding sources.

A number of major inhibitors to tourism growth in the TOMI area have been identified within the TOMI Visitor Plan. It points to the need for intervention to bring about change that will help create a more positive environment for the existing tourism industry to not only survive given current market trends, but also the potential to attract future investment that will strengthen TOMI as a visitor destination. A failure to recognize

and address these inhibitors will place the existing tourism industry at risk in the future with failing infrastructure, continued decline in visitor numbers, loss of new investment and the prospect of growing unemployment numbers.

It also recognised that there are significant constraints for all levels of government in the present economic climate, to be able to fund the identified strategies for the TOMI area. Consequently it is important to take a pragmatic assessment in the Action Plan as to what can realistically be implemented in the short term. For the purposes of the study the short term is considered to be the next 18 months (June 2011 – December 2012), however many of the recommended actions will require ongoing commitment beyond this time period.

The following acronyms have been used for partners within the Action Plan:

GSBC	Glamorgan Spring Bay Council
PWS	Parks and Wildlife Service
PAHSMA	Port Arthur Historic Site Management Authority
TT	Tourism Tasmania
OTCC	Orford/Triabunna Chamber of Commerce
DEDTA	Department of Economic Development, Tourism and Arts
FCTB	Freycinet Coast Tourism Board
MAST	Marine and Safety Tasmania

Strategy	Rationale	Recommended Actions	Collaborating Partners
<i>DG1.</i> A new management partnership arrangement with the PAHSMA be considered for future planning, development and management of the Darlington WHA precinct within Maria Island National Park.	<p>The Darlington site was listed as part of the WHA Australian Convict Sites along with Port Arthur Historic Site, Cascades Female Factory and Brickendon-Woolmers Estates in Tasmania.</p> <p>The PWS have limited resources, skills and expertise to effectively manage the Darlington WHA precinct. The overall responsibility for the management of Maria Island National Park should remain with PWS but the PAHSMA could provide a leadership and advisory role to support PWS in heritage conservation, visitor management and marketing within the Darlington precinct.</p>	<ul style="list-style-type: none"> <li>• The State Government undertake consultation and negotiations with the PAHSMA and the PWS about the potential for a management partnership role.</li> <li>• Resource requirements to facilitate this role over a 3 year period be determined.</li> <li>• Agreement between collaborating partners in place.</li> <li>• Review of outcomes from partnership management arrangement to be undertaken on yearly basis and at end of 3 year period.</li> </ul>	<p>PWS PAHSMA</p>
<i>DD2.</i> Undertake a review of the market needs and requirements for a Government assistance/support package based on a fees-for-service model for the Maria Island ferry service	<p>This is essential in order to establish a viable, affordable and quality ferry service, which has the capacity to run all year round, at regular intervals, and meet customer needs and improved security for the operators. A longer-term vision is required to help build tourism growth around meeting customer needs.</p>	<ul style="list-style-type: none"> <li>• Independent review by State Treasury of the sustainability of the ferry services, past and current financial arrangements and the options for alternative funding arrangements such as fees-for-service package that will deliver customer needs</li> <li>• Establish operating requirements to be met for fees-for-service ferry services</li> <li>• Invite commercial tenders for delivery of a fees-for-service ferry services</li> <li>• Negotiate contracts with preferred ferry service operator</li> </ul>	<p>PWS TT State Treasury</p>

Strategy	Rationale	Recommended Actions	Collaborating Partners
DD3. Revitalise and transform the town of Triabunna as a major service hub for the TOMI area that will attract higher visitation, encourage longer stays and increase yield	Revitalisation could include the installation of town entry signage/features, redevelopment of Charles Street as the new entry road (e.g. this alignment makes better connection to the waterfront and town centre), major streetscaping improvements to connect the town arrival experience (to the entry roads, High Street to the waterfront), interpretation and public art and continued improvements to visitor facilities and services at the waterfront. The revitalisation of Triabunna, in particular enhancing the 'gateways' into the town, and developing the port/marina, will act as catalysts for other opportunities.	<ul style="list-style-type: none"> <li>• Support the funding application for these works as a Regional Development Australia Fund with the Federal Government (currently being co-ordinated by Tourism Tasmania).</li> <li>• Source other potential funding sources for the program.</li> <li>• Prepare a master plan for guiding improvements and landscape enhancement</li> <li>• Seek development approval for all works with relevant agencies</li> <li>• Instigate a main street enhancement program with involvement of retail owners and other land owners</li> </ul>	GSBC TT OTCC
DD5. Upgrade the Darlington jetty and associated visitor facilities on Maria Island	The current jetty has to be structurally upgraded within the next 5-10 years. The upgrade should be designed to cater for ferry services, PWS needs and visiting boats. It should also include infrastructure that will improve the visitor experience (e.g. shelter for visitors waiting for the ferry, improve access and egress safety) and any specific use requirements of PWS, ferry service, operators and the public.	<ul style="list-style-type: none"> <li>• Undertake structural assessment of the Darlington jetty to identify required works and cost estimates</li> <li>• Undertake consultation with key stakeholders to ensure various needs and requirements are considered as part of development and upgrading of facilities</li> <li>• Design and approval of proposed works</li> <li>• Prepare EIA for the proposed new works</li> </ul>	PWS OTCC

Strategy	Rationale	Recommended Actions	Collaborating Partners
<i>DD7.</i> Resolve the ongoing dredging issues with access to the Triabunna wharf/marina area	There is a need to improve access for the Maria Island Ferry, larger pleasure vessels, fishing fleet and to provide long-term security for the working port, and the capacity to develop and market Spring Bay as the best and safest port and marina on the East Coast of Tasmania.	<ul style="list-style-type: none"> <li>• Support the DEDTA plans for undertaking feasibility work in relation to marine infrastructure for the entire East Coast, which would include the potential to identify the extent of dredging and other issues associated with Triabunna port.</li> <li>• Undertake investigations and determine needs and priorities including the dredging issues in Triabunna</li> <li>• Implementation program for of the priorities prepared</li> <li>• Funding strategy for priority works in place</li> </ul>	DEDTA GSBC MAST Hobart Ports
<i>DD12.</i> Prepare a thematic interpretation strategy for the Tasmanian WHA convict heritage sites	This work is currently underway, and will provide the scope to integrate associated tourism product and the delivery of key messages and information across the convict sites.	<ul style="list-style-type: none"> <li>• Support the current preparation of the thematic interpretation plan</li> <li>• Identify the opportunities for the Darlington precinct to deliver the messages and the media and resource requirements</li> <li>• Seek funding for the implementation of the plan</li> <li>• Implement recommendations as they relate to Maria Island and the broader TOMI area</li> </ul>	PWS PAHSMA TT

Strategy	Rationale	Recommended Actions	Collaborating Partners
<i>DD13.</i> Implement the Freycinet Cycling Strategy	The Strategy sets out 5 objectives – encourage the development of quality cycling experiences and product, develop appropriate infrastructure to support cycle tourism and local communities, support and extend the cycling events program for Freycinet, position Freycinet as Tasmania's top cycle tourism destination and foster local support for cycling and cycle tourism. Opportunities within TOMI may include a shared trail between Orford and Triabunna, upgrading the Old Convict Road, as well as enhancing footpath connections between destinations within towns for both walkers and cyclists (including mountain bikers).	<ul style="list-style-type: none"> <li>• Build partnership arrangements with identified primary and secondary partners</li> <li>• Commit resources to the implementation of the Freycinet Cycling Strategy</li> </ul>	GSBC State Government agencies Tourism industry Community
<i>DD15.</i> Identify suitable sites to better cater for the demand of the growing numbers of caravan, camping and motorhomes visiting the TOMI area.	Identify suitable sites to better cater for the demand of the growing numbers of caravan, camping and motorhomes visiting the TOMI area.	<ul style="list-style-type: none"> <li>• Council to identify potential sites that would meet the needs of these users whilst consistent with recent legal advice regarding issues involving free fee sites and the need to charge users basic fees</li> <li>• Development approval be sought for the use of any identified sites</li> <li>• Upgrading of basic facilities at the identified sites</li> </ul>	GSBC OTCC

Strategy	Rationale	Recommended Actions	Collaborating Partners
DM3. Ensure that the TOMI area has a well-designed and integrated internet presence	This should include a dedicated website (including links from East Coast or Freycinet Coast websites, PWS website), where there is consistency of messages and information. It is important that the local tourism industry investigate the ways in which the TOMI area can incorporate new technology and media into products and marketing.	<ul style="list-style-type: none"> <li>Review the existing TOMI area internet offer</li> <li>Consider opportunities for realigning the messages to fit with brand, core appeals from motivational research and links to other key sites</li> </ul>	OTCC FCDB TT GSBC



# **SECTION 1**

## **BACKGROUND AND PURPOSE**

### **1.1 CONTEXT**

The Triabunna/Orford and Maria Island (hereinafter referred to as TOMI) area encompasses the townships of Orford and nearby Triabunna, located approximately 80km from Hobart. The seaside village of Orford is dominated by shacks and larger holiday homes, with a high proportion of retirees, and increasing numbers of permanent residents who commute to Hobart. Triabunna, 6.7 km to the north-east, is characterised by a higher proportion of permanent residents, larger range of community facilities and services, including a Visitor Information Centre, a working port, and is the access point to Maria Island. Smaller settlements in the surrounding area include Buckland and Pontypool/Little Swanport.

Maria Island National Park is located to the south east of Triabunna, separated from the mainland by the Mercury Passage. Maria Island National Park is one of the areas most significant natural and cultural assets, and is known for its scenic, ecological and recreational values. The Island has long been popular with Tasmanians as a family holiday and school group destination. The remains of the convict probation station at Darlington on the western side of the island have recently received World Heritage Area status, in conjunction with Port Arthur Historic Site, Cascades Female Factory, and Woolmers-Brickendon Estates, as part of the Australian Convict Sites. Maria Island National Park encompasses an adjacent marine protected area.

The strength of the TOMI areas natural and cultural values, including the scenic coastline, unspoilt waters, beaches, bushland, wildlife, and heritage have inspired the development and operation of unique and successful nature-tourism products, including the Maria Island Walk, and the Maria Island Ferry and Eco Cruises. Whilst these products have contributed to putting the TOMI area 'on the map', it is recognised that the region, in general, has a limited number of tourism product. This translates to a limited capacity to increase tourism interest in, and maintain the viability of the industry in the longer-term. A decrease in visitation/overnight stays suggests that the area is falling behind the broader East Coast region, in it's ability to capture visitors to the state.

In addition to limited tourism product, the TOMI region also has a limited range of visitor accommodation, facilities and services, including a restricted ferry service, to support tourism growth in the area.

These limitations, combined with concerns for the long-term economic viability of the community, are catalysts for the preparation of the *Triabunna/Orford and Maria Island Visitor Plan*. Imminent closure of the Triabunna woodchip mill, combined with a general down-turn in the forest industry (e.g. cuts to forest contractor quotas), have had, and will continue to have, significant implications for local employment, and the economic viability of the TOMI region.

Local job creation is a primary motivator and desired outcome of the Visitor Plan. It is intended that the Plan will identify achievable tourism-related projects that will provide employment, training and skill development opportunities for local residents. Ramping up the tourism industry as an alternative economic driver for the region will also result in other community benefits, such as a sense of pride, empowerment, and improved infrastructure and services that could improve the quality of life for local residents.

The Plan is a joint project between Glamorgan Spring Bay Council, Tourism Tasmania, the Tasmanian Parks and Wildlife Service, the local tourism industry and the community. Inspiring Place have been engaged to work with the stakeholders and prepare a Visitor Plan for TOMI, which will provide a strategic direction for tourism development, management and promotion into the future.

## **1.2 PURPOSE OF THE TOMI VISITOR PLAN**

The purpose of the project is to “deliver a best-practice visitor plan for the Triabunna Orford Maria Island TOMI) area, including:

- a strategic direction to achieve tangible employment benefits, including training and skill development, and a viable alternative economic driver for the region;
- a strategic direction, that is environmentally sustainable, financially viable, and socially acceptable;
- a collaborative structure that combines the interests, skills and knowledge across government, industry and community;

establishment of clear roles and responsibilities for all stakeholders (e.g. strategic decision-making, ongoing management of the destination);

a better understanding of the target visitor markets, potential demand, and digital solutions;

consideration of a suite of key experiences;

determine likely infrastructure and investment development required for future visitor servicing; and

consideration of the challenges, impediments, and implications for broader regional development.

Importantly, the Plan is to be “innovative, forward-thinking, and market-led”, driven by sustainability, a strong desire to develop and support local industry and business, create jobs for local people, and contribute to community building in the area.

The Plan is a joint project between Glamorgan Spring Bay Council, Tourism Tasmania, the Tasmanian Parks and Wildlife Service, the local tourism industry and the community. Inspiring Place have been engaged to work with the stakeholders and prepare a Visitor Plan for the area, which will provide a strategic direction for tourism development, management and promotion into the future.

### 1.3 PROJECT APPROACH

Development of the TOMI Visitor Plan was undertaken in eight main project stages:

Project Stage	Overview
1. Getting Started	Initial briefing and preparation of work and communication program
2. Background Research	Review of relevant policies, plans and other documents, including market research and visitor data
3. Initial Consultation and Site Investigations	Establish contact with stakeholders, assemble an inventory of existing tourism product, and review of existing infrastructure
4. Applying the Experience Model	Key stakeholder workshop, using the experience model process to define the current and desired destination experience
5. Developing the Strategic Direction	Develop a vision and guiding principals for the destination, identify issues and opportunities, and strategic directions
6. Testing the Strategic Direction	Test the draft strategic direction with key stakeholders
7. Review of Draft Visitor Plan	Public exhibition of the Draft Visitor Plan and review of the feedback received
8. Final Visitor Plan	Preparation of the final TOMI Visitor Plan, incorporating relevant amendments resulting from the public exhibition and review period.

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Table 1.1. Overview of the Project Approach.

### 1.4 BACKGROUND REPORTS

Development of the Visitor Plan has included a review of various tourism and marketing policies and reports including:

*Tourism Tasmania Strategic Plan 2010-2013* (see below for further detail);

*Tourism 21: Strategic Business Plan 2007-2010* (see below for further detail);

*Regional Tourism Review – The Way Forward 2010* (see below for further detail);

*Vision East 2030 – The East Coast Land Use Framework 2009* (see below for further detail);

*Tasmania's East Coast Strategic Marketing Plan 2010-2013*;

*The Freycinet Coast Tourism Strategy 2004-2010*;

*Discover Tasmania Your Holiday Planner: The East Coast and Flinders Island*; and

Parks and Wildlife documents including:

*Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan 1998*;

*Maria Island National Park Darlington Site Plan 1998*;

*Maria Island – Darlington Settlement and Point Lesueur Conservation Management Plan Volume 1 2007*;

*Australian Convict Sites brochure*; and

Local Government documents including:

*Glamorgan Spring Bay Council Strategic Plan 2006-2011*;

*Glamorgan Spring Bay Planning Scheme 1994*;

*Glamorgan Spring Bay Council Final Draft Management Plan – Prosser Bay 2007*;

*Orford/Triabunna Structure Plan 2010 (yet to be endorsed by the Council*;

*Southern Tasmania Land Use Strategy 2010*; and

*Glamorgan Spring Bay Planning Scheme Review*.

Review of the background documentation indicates that there are a broad range of statutory and strategic-level plans, reports and strategies of relevance to the TOMI area in general, and more specifically to tourism development in the area.

There are a number of tourism and marketing reports and policies relevant to the current project, in which the main focus is the broader East Coast region, Freycinet National Park/Coles Bay or Maria Island National Park.

The Visitor Plan provides the first opportunity to focus more specifically on the Triabunna, Orford and Maria Island area, and better align tourism planning in this area with the broader region, and state.

Maria Island National Park is a key attraction within the area, and has a number of plans – some of which are statutory documents (e.g. the *Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan*), guiding planning, development and management. Whilst the Management Plan is more than 12 years old, and requires updating to better align with current PWS planning, it does allow for a range of ‘low-level’ recreation and nature-based tourism upgrades and developments, which could be complimented by tourism developments and visitor infrastructure upgrades in Triabunna, Orford and surrounding areas. Other PWS documentation provides a framework for the protection, maintenance and sensitive reuse of historic buildings and artefacts.

Tourism development in the TOMI area will be subject to the suite of planning legislation (e.g. the Tasmanian Planning System), strategies and plans – including the provisions of the *Glamorgan Spring Bay Planning Scheme*, and the recommendations of the Structure Plan and Land Use Strategy.

## **1.5 SOCIO -ECONOMIC PROFILE OF THE TOMI AREA**

### DEMOGRAPHICS

The broader East Coast<sup>2</sup> region is characterised by a small population dispersed across a large area. This trend is true also for the Glamorgan Spring Bay local government area (LGA), with 1.7 persons per km<sup>2</sup> compared to the Tasmanian average of 7.3<sup>3</sup>.

Other demographic characteristics of the study area include:

Triabunna is the second largest township to St Helens, within the broader East Coast region, with a population of 795, based on 2006 Census data<sup>4</sup>;

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<sup>2</sup> Encompassing the local government areas of Break O'Day, Glamorgan Spring Bay, Tasman, and the eastern coastal and rural area of Sorell.

<sup>3</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 12.

<sup>4</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 13.

Orford has a resident population of 554 based on 2006 Census data, and is characterised by a high percentage of holiday homes, retirees and an increasing number of residents who commute to Hobart;

a resident LGA population differentiated from that of the state by an older profile (e.g. a median age of 49 compared to the state median of 39<sup>5</sup>), with fewer young people;

a significant difference between the median age for Triabunna (39), and Orford (53)<sup>6</sup>;

a much younger age profile for Triabunna (e.g. higher proportion of 5-34 year olds than the state average) compared to Orford, which has a higher percentage of people in all age classes above 55 years;

seasonal fluctuations in population given the high proportion of shacks/holiday home accommodation;

high seasonal demand for services and accommodation during the summer months;

a large proportion of vacant accommodation in Orford outside of the summer period;

slow projected population growth, with a 0.8% growth rate projected between 2008 and 2020 (e.g. an increase of 118 residents in Triabunna, and 82 in Orford), and a 0.3% projected growth rate between 2020 and 2030 (an increase of 53 residents in Triabunna and 37 in Orford).

#### S O C I O - E C O N O M I C

The local economy of the area is characterised by aquaculture, agriculture, forestry (including the woodchip mill), fishing, and, to a lesser extent, tourism. Commercial, community services and facilities, and industrial uses are primarily based in Triabunna (e.g. the Triabunna Woodchip Mill), with other boutique industries (e.g. viticulture) and nature-based tourism occurring in the surrounding area. Triabunna also retains a

<sup>5</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 12.

<sup>6</sup> Ibid

working port, with a small fleet of commercial fishing and recreational vessels.

The recent downturn in the forest industry, in particular, imminent closure of the Triabunna Woodchip Mill, will have significant implications for a township already suffering increasing unemployment.

Orford is a well-known holiday destination, with a strong shack culture and a high percentage of part-time residential and holiday accommodation dwellings. At the time of the 2006 Census, 61% of private dwellings in Orford were unoccupied on Census night<sup>7</sup>, reflecting the high number of dwellings used as holiday accommodation, rather than permanent residences. The majority of part-time shack residents originate from the Greater Hobart Area. There is limited employment opportunities in Orford itself, however, some residents work in Triabunna, and others increasingly commute to Hobart.

Other socio-economic characteristics of the region include:

Triabunna exhibited a low unemployment rate at the time of the 2006 Census<sup>8</sup>, however, anecdotal evidence suggests that the recent downturn in the timber industry has, and will continue to result in job losses, and contribute to a higher unemployment rate;

more than 80% of the residents Census Collection Districts in the Glamorgan Spring Bay local government area, scored below the Australian mean on the Index of Relative Socio-economic Disadvantage (the Index is derived from Census variables which can be indicative of disadvantage such as low income, low educational attainment, unemployment, and dwellings without cars)<sup>9</sup>; and

residents of the Glamorgan Spring Bay local government area have considerably lower levels of education, including post graduate, graduate, and bachelor degrees in comparison to the regional and state averages<sup>10</sup>.

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<sup>7</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 21

<sup>8</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 12

<sup>9</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 17-18

<sup>10</sup> Urbis (2011), *Triabunna/Orford Structure Plan*, page 15-16



## **1.6 ACKNOWLEDGEMENTS**

The project team would like to thank the Project Steering Committee, including representatives from Glamorgan Spring Bay Council, Tourism Tasmania, Tasmanian Parks and Wildlife Service, Freycinet Coast Tourism Board, and the Orford Triabunna Region Chamber of Commerce for their knowledge, time and guidance throughout the project.

The Project Team would also like to thank the individuals from the local tourism industry and the community who contributed to the development of the Plan through providing information and sharing local insights and observations.



## **SECTION 2**

### **ASSESSMENT OF THE CURRENT VISITOR EXPERIENCE**

#### **2.1 EXISTING PRODUCT**

A search of the TigerTour Database resulted in a list of 32 tourism products within the TOMI region. Of these:

23 (72%) are accommodation businesses with a total capacity of 930 beds - ranging from campgrounds, bed and breakfasts, holiday cabins, to a motel, hotel and a resort (these are primarily small scale operations);

seven (22%) are attractions, including Maria Island National Park, Darlington Vineyard, the Wielangta Forest Drive, and a gallery; and

two (6%) are tours – Maria Island Walk, and the Maria Island Ferry and Eco Cruises.

The majority of the existing products are located in Orford (16, or 50%), of which all but three are accommodation businesses, and:

eight products (25%) are located in Triabunna, and are a mix of accommodation and attractions;

four products (12.5%) are located on Maria Island – and include basic accommodation, self-guided attractions and tours;

three accommodation businesses are located in the Little Swanport Area; and

two products (accommodation and the Tasmanian Bushland Garden), and one product (holiday home) are located in Spring Beach.

In addition to those products captured by the TigerTour Database, other businesses catering to visitors within the region include:

retail (e.g. seafood outlets, cafes and other eateries, boutique shops and general services);

private shack/holiday home rentals; and

the PWS Discovery Ranger program activities over the summer months.

### **2.3 THE CURRENT EXPERIENCE**

The current visitor experience has been defined by research, site visits and consultation with the local tourism industry and community who attended an experience workshop (see Table 2.1). This is based on the layers of an experience set out in the Tasmanian Experience Model<sup>11</sup>, being:

Interpretation;

Services;

Tours, Activities and Attractions;

Infrastructure; and

Place

To maximise the experience, each of the layers must deliver consistent quality that is targeted to the needs of the market.

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<sup>11</sup> Tourism Tasmania 2002. The Tasmanian Experience ; Creating unforgettable natural experiences.

<p><b>INTERPRETATION</b></p> <ul style="list-style-type: none"> <li>• Interpretation on Maria Island - information panels, Discovery Ranger program, and Coffee Palace</li> <li>• Interpretation provided by guides on tours and ferry service (e.g. about Spring Bay Mussels operations)</li> <li>• Limited interpretation of historic buildings in Triabunna – information panels</li> </ul>
<p><b>SERVICES</b></p> <ul style="list-style-type: none"> <li>• Triabunna Visitor Information Centre</li> <li>• Maria Ferry Service</li> <li>• Range of basic services (retail, information, internet, ATM/banking, post, food and beverage)</li> <li>• East Coast Cruises shuttle bus service – public transport to the area generally limited</li> <li>• Quality restaurants and cafes</li> <li>• Medical services – two local doctors in Triabunna and Health Centre, and paramedics)</li> <li>• Online Access Centre</li> </ul>
<p><b>TOURS, ACTIVITIES AND ATTRACTIONS</b></p> <ul style="list-style-type: none"> <li>• Maria Island Ferry</li> <li>• Maria Island Walk – award winning nature-based tourism product</li> <li>• East Coast Cruises - One Day on Maria, Maria Island Eco Cruise, and Wilderness to Wine</li> <li>• Tasmanian Bushland Garden</li> <li>• Other East Coast tours that may stop and pass through the area</li> <li>• Darlington Vineyard</li> <li>• Wielangta Forest Drive</li> <li>• Dive wreck – the Troy D</li> <li>• Caravan park</li> <li>• Camping opportunities</li> <li>• Tasmanian Seafarers Memorial</li> <li>• Independent recreation and nature-based activities – walking, cycling, fishing and water sports, diving, kayaking, boating/sailing etc</li> <li>• School group facilities (e.g. Gumleaves, Spring Beach Youth Convention Centre, and Maria Island campground)</li> <li>• Tas Air Scenic Flights – Maria Island and surrounds</li> <li>• Trout Fishery and Sporting retreat (Twin Lakes) and Redbanks Fish and Field Outdoor Experience</li> </ul>
<p><b>INFRASTRUCTURE</b></p> <ul style="list-style-type: none"> <li>• Roads – some in better condition than others (e.g. the gravel surface of Wielangta Road may deter some visitors with hire cars)</li> <li>• Town service centres at Triabunna and Orford (may be water and sewer capacity limitations in some places)</li> <li>• Range of accommodation types (although limited high end)</li> <li>• Port/mooring facilities – currently limited with minimal capacity for visiting vessels</li> <li>• Boat ramps</li> <li>• Sport and recreation facilities – golf course, bowls club, shooting clubs, tracks and trails (including 4WD, and the Old Convict Road)</li> <li>• Day use areas – picnics, barbeques</li> <li>• Basic visitor infrastructure on Maria Island – camping, toilets, walking tracks</li> <li>• Air strip on Maria Island</li> <li>• Black water dumps for motorhomes in Triabunna and in the caravan park</li> </ul>
<p><b>PLACE</b></p> <ul style="list-style-type: none"> <li>• Maria Island National Park (World Heritage Area) and Marine Protected Area (Maria Island Marine National Park)</li> <li>• 'World-class' marine environment and coastline - recreational and commercial fishing, diving, water sports and activities</li> <li>• Working port</li> <li>• Beaches - family friendly and easily accessible</li> <li>• Shack/holiday home culture – coastal lifestyle activities</li> <li>• Natural environment – marine and coast, inland forests (e.g. Wielangta), wildlife, threatened species</li> <li>• Strong cultural heritage – both European and Aboriginal (convict history on Maria Island, boat building and sandstone quarrying, buildings/structures, and the oldest stained glass window in the Southern Hemisphere in the Buckland Church)</li> <li>• Local industries – aquaculture, seafood, Darlington Vineyard, agriculture</li> <li>• Small-scale settlements and low-level development – 'slower pace lifestyle'</li> <li>• Maritime climate</li> <li>• Proximity to Hobart and Port Arthur</li> <li>• Gateway/entry to the East Coast</li> <li>• Art and craft – galleries, local artists</li> <li>• Spring Bay – only 'all weather' port on East Coast</li> <li>• Local seafood (e.g. Spring Bay Mussels)</li> <li>• Buckland Church</li> </ul>

Table 2.1. Current Visitor Experience for the TOMI Area

## **2.3 TOURISM TRENDS**

### **2.3.1 Major Tourism Industry Trends**

Attachment 1 sets out the broader tourism trends and challenges that will influence and impact visitation to Tasmania, and to the TOMI area. These trends include:

- increasing affluence in developing countries;
- projected increases in international travel;
- low cost airlines;
- decline in domestic travel;
- rising oil costs (vulnerability of the tourism industry to oil price increases);
- environmental awareness and demand for sustainable tourism;
- climate change;
- an ageing population;
- increased technology sophistication and personalisation; and
- increasing demand for authentic, personalised and experience-rich tourism.

This overview was based on a review of various information sources, including research papers from Tourism Industry Australia, Tourism Australia, Tourism Research Australia and Tourism Tasmania.

### **2.3.2 TOMI Visitor Market Trends**

This section provides a summary of the following visitor markets to the TOMI area:

- International and interstate visitors;
- visitors to Maria Island;
- intrastate visitors; and

'sub-markets' of the above (e.g. holiday home/shack market, school groups, camping/motorhomes, nature-based tourism experience visitors)

The information presented indicates that the domestic market, both interstate and intrastate is most significant to the area, with the international market relatively small.

#### INTERSTATE AND INTERNATIONAL VISITORS

The following information has been sourced from the Tasmanian Visitor Survey (TVS).

In the last three years, the market share of total visitors to Orford as a percentage of the total visitors to the East Coast Region have declined from 48.5% to 38.4% (Figure 1).

Over the same time period, the market share of total holiday visitors to Orford as a percentage of the total holiday visitors to the East Coast Region have declined from 48.9% to 39.1%.

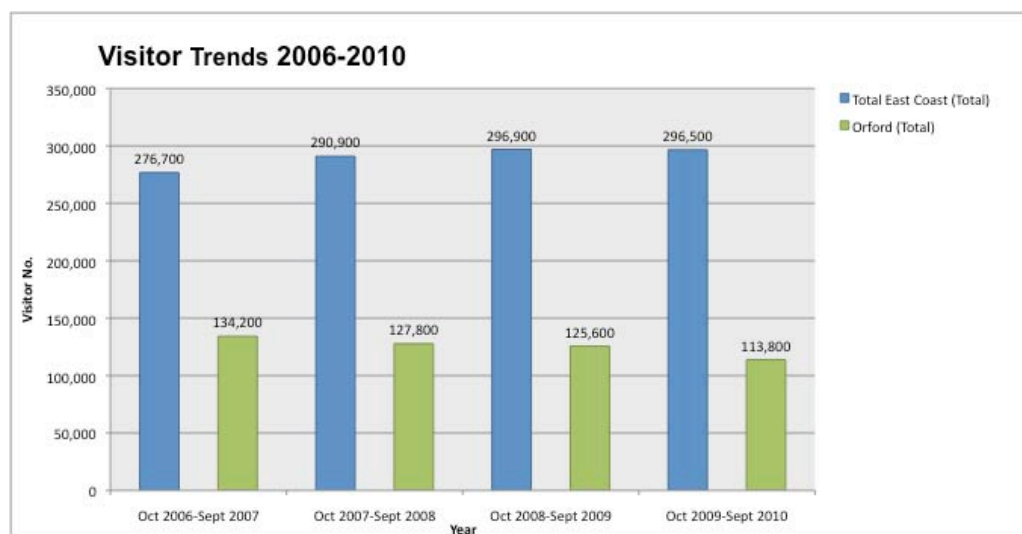


Figure 1: Total Visitors to the East Coast Region 2006-2010

The following is a summary from the TVS, of some of the characteristics of visitors to Tasmania who indicated that they either stopped or stayed overnight in Orford between the period October 2009 to September 2010:

27% of interstate visitors were from Victoria, 20.6% from NSW, and 20.3% from Queensland;

the majority of visitors departed Tasmania from Hobart Airport (47%), followed by Launceston Airport (28%), and Devonport TT Line (25%);

48% indicated that they had not visited Tasmania previously (52% had been before);

the majority of visitors were 'holiday' visitors (76%), followed by 'visiting friends and relatives' visitors (18%);

59% of visitors travelled in a party of two (excluding Tasmanian residents);

rental vehicles were the most commonly used form of transport (49%), with 40% of the total rental vehicles being cars/4WD without caravans/campervans;

22% of visitors used their own vehicle as their main form of transport, while only 5% used public transport, and 3% traveled by bicycle;

the five most popular activities that visitors participated in were:

- visit historic sites/attractions (74%);

- visit national parks (68%);

- browse at the markets (64%);

- visit craft shops (59%); and

- visit historic houses (57%).

46% of visitors indicated that they bushwalked for less than two hours, 25% bushwalked for 2 to 4 hours, 14% for over 4 hours, and only 5% went on an overnight bushwalk;

29% of visitors participated in other walks (not bushwalks) during their visit;

of the other outdoor activities recorded by the TVS:

- 36% viewed wildlife (not in a wildlife park/zoo);

- 25% viewed wildlife in a wildlife park/zoo;



10% went fishing (other than trout fishing);

7% cycled, including rode a mountain bike; and

only 0.2%\* went scuba diving or snorkeling.

of the attractions in the Tasman region, 54% visited the Port Arthur Historic Site, 37% visited the Blowhole/Tasman Arch, and 17% visited Fortescue Bay/Tasman Arch.

The *December 2010 Sentiment Survey* conducted by the Tourism Industry Council Tasmania found that tourism businesses across the State remain concerned about future business levels which are becoming harder to forecast given the changes in booking trends and shortened lead times.

#### VISITORS TO MARIA ISLAND

Total arrivals to Maria Island (Darlington) by ferry has declined from a peak in 2004/05 of around 15,000 persons to around 8,000 in recent years (see Figures 2 and 3).

The decline in visitation to Maria Island plummeted via ferry in 2007/08, coincides with the time period when there was no reliable ferry service operating.

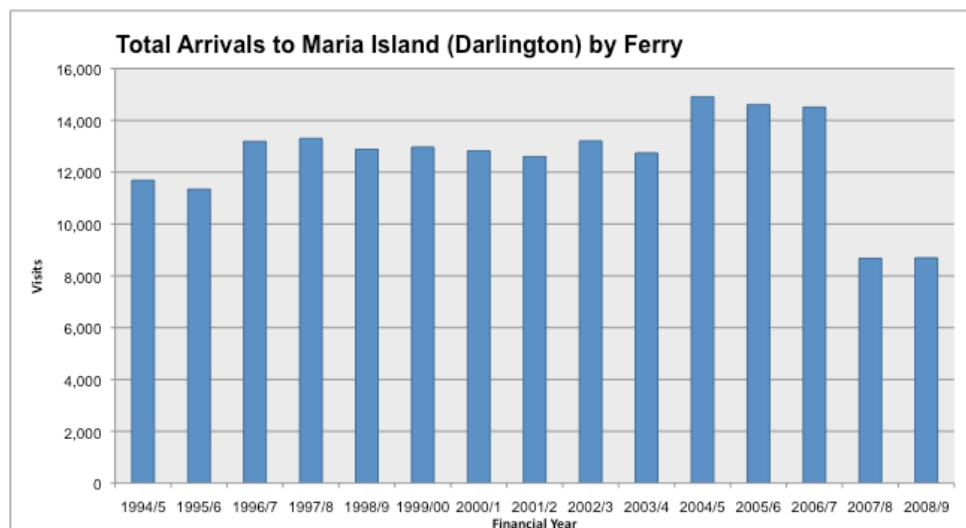


Figure 2. Total arrivals to Maria Island (Darlington) by ferry, 1994 to 2009.

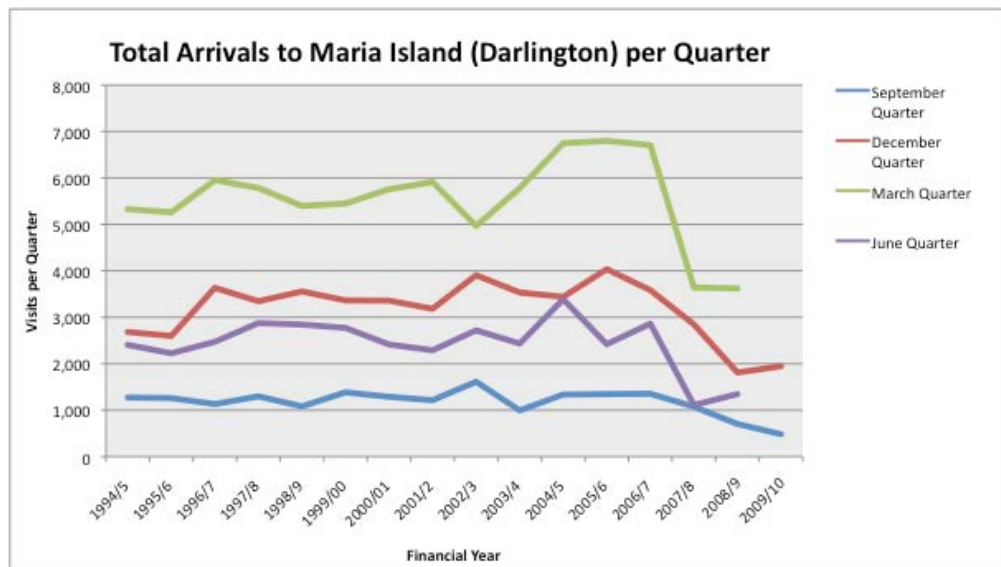


Figure 3. Total arrivals to Maria Island (Darlington) by ferry per quarter.

#### INTRASTATE VISITORS

There is limited information available on the intrastate visitor market to the TOMI area. The National Visitor Survey provides an indication of the Intrastate day trips and Intrastate overnight trips for the East Coast and Glamorgan Spring Bay, but this also includes Coles Bay, Bicheno and Swansea (outside of the TOMI area). The survey indicates that the East Coast has accounted for about 5-6% of total intrastate day trips over the last 5 years and between 13-16% of the total Intrastate overnight trips within the State.

#### VISITOR SUB-MARKETS

A number of existing sub-markets can be identified within the TOMI area, those being:

- holiday home or shack market (part of the intrastate market);
- school groups (mainly from Tasmania) to Maria Island;
- friends/family groups that are camping on regular trips to Maria Island;
- experience seeker or nature-based tourism visitor (niche market);

day visitor market to Maria Island; and  
camping/motorhome/caravan market.

### ***Holiday Home/Shack Market***

The TOMI area and in particular Orford/Spring Beach area is a popular holiday home destination, attracting high levels of visitation during the summer months (especially the school holiday period), Easter and long weekends. Anecdotal evidence suggests that the majority of shack owners are drawn from southern Tasmania, particularly from the Greater Hobart Area and surrounds. These visitors support local businesses through the purchase of food, beverage, petrol and other supplies – as well as being regular users of cafes, bakeries, hardware, banking and services. However, the close proximity to Hobart and Sorell, with major shopping centres and supermarkets is likely to limit the total visitor spend on goods and services. During summer months, some holiday homeowners, as well as a number of residents, commute between work in the Greater Hobart Area and the holiday home in TOMI area.

There are also permanent residents that make day trips or use their own boats/yachts to access Maria Island<sup>12</sup>.

### ***School Groups***

Maria Island attracts Tasmanian school groups that camp on the Island for several nights, are self-catering and undertake a range of educational and outdoor activities. This market was once one of the strongest for the Island, however, it has declined in recent years with the introduction of higher ferry costs.

### ***Family/Friends Groups***

Maria Island attracts a number of friends and family groups that make regular/annual visits to camp or use the Penitentiary accommodation. This often occurs during school holiday and public holiday periods. Groups are self-reliant and often bring bicycles, kayaks and other recreational equipment to the island. These visitors have a strong attachment to Maria island based on personal and/or family history, and are attracted by the remote and undeveloped nature of the island.

### ***Experience Seeker or Nature-based Visitor (Niche Market)***

The Maria Island Walk product is one of the leading nature-based tourism experiences within the State and has been recognised as such with many travel and industry awards. It allows clients, mainly international and

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<sup>12</sup> The capacity to access Maria Island by boats/yachts is very weather dependent and there is limited mooring facilities other than the Darlington jetty.

interstate, to enjoy a 4 day experience on the island with transport, guides, accommodation and catering inclusive. This product has been successful in positioning Maria Island (and thus the TOMI area) within the international and interstate visitor market, with a number of marketing and promotional benefits for the TOMI area - not dissimilar to the impact that the Bay of Fires Walk or the Freycinet Walk has had in helping position these high-profile destinations within the East Coast region.

In addition to the Maria Island, there has also been the more recent emergence of other nature-based tourism products (e.g. East Coast Cruises, Maria Island Ferry) promoting nature experiences linked to Maria Island and the marine environment.

A niche market may include visitors seeking cycling experiences within the East Coast – this would include cycle tourers, event cyclists, mountain bike riders and recreational cyclists as identified in the *Freycinet Cycling Strategy*.

Whilst the overall visitor numbers for these products may only be a small proportion of the total visitor market, they play a significant role in promoting and marketing the TOMI area as a visitor destination for the international and interstate markets.

### ***Day Visitor Market***

Maria Island attracts a number of day visitors out of Triabunna, who use the ferry service, or other tour operators. The ability to grow the day will be influenced by the ability to provide, and build a market perception of reliable and regular transport service to the island, and that offers 'value for money'. Reliable transport will need to be associated with a range of activities, that provide visitors with a 'taste' of Maria Island.

This market is considered particularly compatible with the management intent, and visitor carrying capacity limitations of Maria Island (e.g. energy, accommodation, staffing, and facilities).

### ***Motorhome, Caravan and Camping Visitors***

Tourism Research Australia data indicates that the caravan and holiday-park market segment is one of the fastest growing visitor markets in Australia. It is estimated that this market has shown annual growth rates of more than 10% over the last 12 years<sup>13</sup>.

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<sup>13</sup> Tourism Tasmania (2009) *Caravan and Holiday Park Market Snapshot*, page 1.

This national trend is also evident in Tasmania. The TVS and research conducted by the Caravan Industry Australian (Tasmanian branch) indicate significant growth in this market segment in Tasmania. For example, there has been a 16% increase over the last 4 years in the number of interstate leisure visitors who stayed at least one night in a caravan, cabin or tent<sup>14</sup>.

The information presented below has been sourced from Tourism Tasmania's document – *Caravan and Holiday Park Market Snapshot*, October 2009.

The caravan and holiday park market:

- contributes around \$316 million annually to the Tasmanian economy – up from \$265 over the last 4 years;

- 21.6% of visitors to the state stayed at least one night in a caravan, cabin, or tent in the year to June 2009;

- is principally a domestic market – Australians comprise 91% of the market;

- the majority of visitors are Victorian, followed closely by New South Wales and Queensland, with intrastate visitors all so an important segment;

- the average stay for caravan component of this market is 30 days, 15 days for campervans, and 11 days for cabin accommodation; and

- the market is predominately made up of mature-age travellers, with interstate families also comprising a significant part of the market.

Future predictions for the caravan and holiday park market include:

- continued growth over the next 10-15 years , with caravans and camping expected to be the main growth in accommodation up until 2020 (this is due in large part to the Baby Boomers, being the next 'wave' of retirees, and exhibiting interest in this type of travel;

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<sup>14</sup> Ibid

significant increase in the registration of campervans/motorhomes Australia-wide;

278% increase in the manufacture of caravans in Australia since 1995; and

significant growth rate in Caravan and Motorhome Club of Australia (CMCA) membership, of up to 500 new members a month.

Similar to many other places in Tasmania, the TOMI area is seeing an increase in motorhomes and campervan visitors, and the limited capacity to accommodate this demand within existing caravan parks and camping areas. As a consequence, areas such as the Triabunna foreshore are becoming 'informal' overnight camp locations for this market, with limited return to the local community.

## **SECTION 3**

### **STRATEGIC DIRECTIONS FOR TOMI**

This section of the report is about what strategic directions need to be considered to achieve tourism growth and the potential for increased local job creation in the future. It outlines the shift required from the current visitor experience, to better aligning with what the customer wants. It identifies the major inhibitors to tourism growth, presents three development scenarios for the TOMI area.

Section 3.4 presents a tourism vision for the TOMI area, and Section 3.5 outlines the target markets. A suite of goals and strategies for growing tourism by destination management, development and marketing are also provided.

#### **3.1 DESIRED FUTURE EXPERIENCE**

Tourism Australia has undertaken extensive research to identify the ideal visitor segment for Australia – those visitors who are receptive to the Australian experience. The identified target market is the *Global Experience Seeker*, which constitutes from 30-50% of all potential long-haul outbound travellers from key source markets. They can be found across all ages, income levels and origins but share a common attitude to travel, personal development and everyday life.

Experience Seekers are leaders within their peer groups. They are early adopters of products and services and their value as a market therefore extends to the influence they have on the holiday purchasing behaviour of others. They search for active engagement and participation and want to get involved with the day-to-day culture of local people and places. Therefore, the wider experience on offer at a destination is critical to its appeal for the Experience Seeker.

The Experience Seeker has a number of key wants to satisfy their travel experience:<sup>15</sup>, including:

authentic personal experiences;

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<sup>15</sup> *ibid*

social interactions – making friends and developing personal relationships;

meet and interact with the locals;

experience something different from their normal day-to-day life;

understand and learn about different lifestyles and cultures;

participate in the lifestyle and experience, rather than observing it;

challenge themselves – physically, emotionally and/or mentally;

visit authentic destinations that are not necessarily part of the tourist route; and

exposure to unique and personally compelling experiences.

Research into the Australian interstate<sup>16</sup> travelers indicate three key criteria for any holiday destination to trigger interest:

accessibility including perceived value for money;

aspirational – a destination that people feel as though they must experience at least once in their life; and

provides multi-themed experiences – choice of a wide variety of experiences without necessarily needing to participate in all of them.

For the interstate travelers to Tasmania, the types of holiday experiences they seek include coastal, adventure, and short break. Many visitors are also familiar with Tasmania being a nature-based tourism destination<sup>17</sup>, and are seeking such experiences.

Motivational research conducted for Tourism Tasmania<sup>18</sup> identified some of the appeal triggers and motivations for visitors to the State. The research focused on Tasmania's main interstate markets of Victoria, New South Wales and Queensland, and involved online surveys and focus

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<sup>16</sup> Referenced from the Lighthouse Report One, Tourism Tasmania 2007.

<sup>17</sup> Ibid

<sup>18</sup> Source [www.tourismtasmania.com.au/research](http://www.tourismtasmania.com.au/research)



groups. The key findings of interest to the future planning for the TOMI area were:

- a generally low level of awareness of the holiday experiences available in Tasmania among participants;

- the appeals of 'coastal nature' (81% appeal), 'heritage' (74%) and 'wilderness' (75%) were consistently ranked highest across each of the participant segments (in addition to those listed above, the 'appeals' also included outdoor experiences, wildlife encounters, food

- 'wilderness', 'heritage' and 'wildlife' encounters to be the highest appeals;

- raising the awareness of Tasmanian travel; experiences has the potential to increase the intention to visit by 34%; and

- building awareness of Tasmania's 'wilderness', 'coastal nature' and 'heritage' experiences is considered to have the highest potential to motivate visitors to holiday in the state.

The TOMI area is strong on the potential appeals of 'coastal nature' and 'heritage' (particularly given the recent World Heritage Area<sup>19</sup> listing of Darlington as part of the Australian convict sites) and for many visitors, may also be recognised as a 'wilderness' experience given the sense of remoteness associated with Maria Island.

The intrastate market appears to be motivated by a similar set of appeals to those of the interstate travelers. The major barrier to holidaying within Tasmania is the lack of awareness of the variety of experiences and products available<sup>20</sup>.

The following table suggests what might be the basis for a desired future TOMI area visitor experience. The table describes how the visitor experience can be better aligned with what the customer wants.

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<sup>19</sup> hereinafter referred to as WHA

<sup>20</sup> *ibid*

Core Elements	Brief summary of the Current TOMI Visitor Experience	What visitors want.....	Desired TOMI Future Visitor Experience
Interpretation	Limited use of interpretation, dated media (e.g. information panels) with the exception of the personalised tours provided by Maria Island Walk and East Coast Cruises	Engagement	There are clear, strong, consistent and engaging messages about the TOMI destination that are delivered through a range of different media and targeted to different customer markets. The interpretation delivery allows visitors to engage with the local community, to learn about the natural and cultural values in a meaningful way (i.e. not just facts and figures), and provide a contrast to their daily life experiences. It builds a desire for return visits, and a 'braggability' factor.
Services	Basic services limited in part by the small visitor market, limited viability and strong market seasonality rather than serving customer need.	Personalised	Improvements to the visitor services and infrastructure (e.g. roads, ferry and public transport, jetties, toilets, visitor signs and information, and recreation trails) that will add value to the tour services. Regular, reliable and viable services to cater for the seasonal visitor market, including public transport from Hobart.
Tours, activities and attractions	Small range of tours and activities - Maria Island Walk being the leading tourism product currently within the destination. Maria Island's potential as a leading nature-based and cultural heritage tourism destination is not currently being realised. Limited take-up of visitor activities and tours despite diversity of place values.	Accessible, personalised, authentic, value and engaging	An increase in the choice and price-point for a range of tours, activities and attractions that will allow increased visitors to access and enjoy the destination. Tours, activities and attractions that deliver on brand perceptions. The motivational research study suggests the scope to build appeals around coastal nature, heritage and possibly wilderness within TOMI. Well-presented and self-guided journeys that are linked to products and the destination. Visitor market to have sufficient mass to support the viability of existing and new product.
Infrastructure	Core basic infrastructure in place (roads, services, accommodation, visitor facilities) but major stop-gaps to deliver capacity for visitor growth to the destination e.g. Wielangta Road, ferry service, Maria Island jetty, dredging of Triabunna marina, and accommodation capacity.	Quality	High standard infrastructure that is relevant to the target market, and reflects the local sense of place. Improved infrastructure to facilitate better connections with other destinations (e.g. Hobart, Tasman Peninsula, East Coast) and to access core attractions (Maria Island). Broader range of quality accommodation choice. Infrastructure to comply with all the legislative, planning and environmental requirements.
Place	Strong place values (both natural and cultural) with Maria Island National Park and 'pristine' coastal waters being leaders. Recent WHA listing for the Darlington convict site on Maria Island.	Connection	The distinctive place values are sustainably managed, marketed and promoted to under-pin the destination, and form the basis for the development of engaging experiences.

### **3.2 MAJOR INHIBITORS TO TOURISM GROWTH**

A number of major inhibitors affecting tourism growth within the TOMI area have been identified. These are not new issues but rather challenges that have been evident to many people within the tourism industry and government for some time. Measures to resolve these issues have been discussed in the past but progress has failed for many reasons including the lack of a whole-of-government approach, limited resources and funding, lack of political leadership, lack of effective business planning and the pursuit of fragmented solutions rather than following integrated processes. The *TOMI Visitor Plan* presents a real opportunity to take a more holistic approach to tackling the critical inhibitors and to identify strategic directions for moving ahead.

The major inhibitors for the destination are considered to be:

- Limited competitiveness of the destination
- Unsustainable ferry service
- Gaps in Infrastructure and visitor services
- Resource and management limitations
- Legislative and policy requirements

These inhibitors are discussed in some detail in Attachment 3.

The State Government will need to be a leader in tackling these constraints in an integrated way, as they are beyond the capacity of the local tourism industry, Council or community. Until these constraints are overcome, there is always the risk that the industry will consider there to be little incentive to invest significantly within the area.

A review of the current *Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan 1998* was undertaken as part of the background research for this project. The implications for recreation and tourism planning and development on the island have been considered, in light of the age of the statutory management plan and are outlined in Attachment 3.

Whilst the *Management Plan* is due for review to bring it in line with the new (draft) *General Management Plan* (e.g. which incorporates a

standardised approach to zoning), and the recent World Heritage Area designation of Darlington, there appear to be few significant barriers to the types and scale of recreation and tourism developed proposed in the *TOMI Visitor Plan*, or identified by PWS through other processes.

Whilst TOMI has the potential to deliver the Tourism Tasmanian tourism brand<sup>21</sup> of “A World Apart, Not A World Away” and the regional East Coast brand “World class close” and respond strongly to the core motivational attributes identified for Tasmania, the above inhibitors remain as hurdles for achieving these benefits.

### **3.3 FUTURE DEVELOPMENT SCENARIOS FOR TOMI**

Three possible scenarios are presented for the future of TOMI as a visitor destination based on the assessment of the current visitor experience, desired future experience and the major inhibitors.

Scenario 3 clearly offers the best prospects to achieve tourism growth, increased yield and job employment within the TOMI area in the future.

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<sup>21</sup> The new tourism brand is the result of extensive consumer research and industry consultation and is the start of a long-term communications strategy that will see Tasmania’s tourism industry through the next three years.

Possible Scenarios	Reasoning and Implications
<b>Scenario 1 Fall and fade</b>	<p>The current assessment of the TOMI area highlights some significant inhibitors – loss of population due to the decline in other local industries, limited tourism product development, declining visitation to the core attraction of Maria island, a loss of visitor market share, not being competitive with other destinations, small scale tourism industry, gaps in infrastructure and limited sustainability of the existing industry given the trends that are occurring.</p> <p>The above trends are expected to continue unless there is significant government leadership in responding to these issues – it is beyond the capacity of the local tourism industry to tackle alone.</p> <p>The implications associated with this scenario is that the TOMI area will not be seen as an attractive visitor destination or a viable destination for tourism investment, and that it will simply fade over time as other destinations within the State increase their investment, professionalism and grow their yield.</p> <p>This scenario may result in further loss of employment opportunities within the local community including the tourism industry in the future.</p>
<b>Scenario 2 Crawl and survive</b>	<p>This scenario could occur with some limited intervention by government and possibly the private sector, to stimulate increased visitor interest in the TOMI area. It might help recapture some of the declining market segments, and help hold or regain some market share.</p> <p>However, given the significant investment required to upgrade infrastructure and improve visitor services, there is the risk that the fundamental issues will not be addressed in a fully integrated way.</p> <p>As a consequence, the TOMI area may slowly improve as a destination but struggle to develop a compelling experience or keep pace with other destinations, limiting its chances to be truly competitive with other destinations. In doing so, it may not provide sufficient confidence for the private sector to consider major investments within the local tourism industry.</p> <p>This scenario may facilitate existing employment in the tourism industry and provide scope for some additional job creation over time.</p>
<b>Scenario 3 Leap and grow</b>	<p>This scenario recognises that the TOMI area will only become a more competitive and sustainable tourism destination with a significant investment from the government to address the major issues inhibiting tourism investment and growth. Unless these issues are tackled in an integrated way, there is very little incentive for the tourism industry to invest in this destination.</p> <p>This scenario represents a big shift - a strategic move lead by government to help position the TOMI area as a competitive tourism destination, with the scope to support existing operators and nurture new investment in the industry.</p> <p>This scenario may provide a major stimulus for employment and training within the local community as well as attract new skills and services to support the wider tourism industry.</p>

### 3.4 KEY TARGET MARKETS

The following key target markets are considered to be compatible with the TOMI visitor experience in the short-medium term. Encouraging growth in these markets is considered to be the best prospect for strengthening the tourism industry in the area, based on research, consultation and the strategic assessment undertaken, and include:

increasing the day visitor market to Maria Island;

greater conversion of the visitors passing through the area (interstate and international) to the East Coast region to stop and staying longer (including overnight stays) and spend more within the TOMI area;

school groups and friends/family market (mainly intrastate market) to Maria Island; and

the camping/caravan/motorhome market.

This does not imply that other visitor markets should not be pursued but rather that these target markets offer real potential for growth in the TOMI area.

### 3.5 THE VISION FOR TOMI

The vision for the TOMI area must be realistic and honest, as it is clearly evident that there are major constraints that will continue to limit the potential for the area to grow into being a stronger visitor destination.

The proposed vision statement is:

***The TOMI area will become a strong visitor destination, through the delivery of well-developed infrastructure, visitor facilities and services that support market-leading experiences to create growth in visitor numbers, yield and local employment and skill development.***

### 3.6 GOALS AND STRATEGIES

The vision requires a number of goals to help create the TOMI area as a stronger visitor destination that will deliver significant social, economic and environmental benefits to the community in the long-term. This includes the potential for the tourism industry to support job creation opportunities at a time when other local industries have or may face declining employment.

The goals are:

Destination Goal	Objective
<b>Governance</b>	Develop the capacity to effectively manage the destination on a sustainable basis.
<b>Development</b>	Fix infrastructure gaps and lead with memorable visitor experiences, facilities and services to drive increased visitor numbers, longer stays and greater yield within the destination.
<b>Marketing</b>	Promote and market tourism both within and outside the destination to attract and influence key visitor markets.

Strategies for each of these goals are presented below. These provide a range of desirable actions that could be taken to help achieve the vision for TOMI, but the implementation will be entirely dependent upon the level of partnership support, available resources and processes involved with these actions. Section 4 of the report identifies what is considered to be achievable within the time frame of the next 2 years.

### 3.6.1 Strategies for Destination Governance

A number of identified strategies are listed under each of the above destination goals.

No	Strategies for Destination Governance	Rationale
DG1	A new management partnership arrangement with the PAHSMA be considered for future planning, development and management of the Darlington precinct in Maria Island National Park.	<p>The Darlington site was listed as part of the WHA Australian Convict Sites along with Port Arthur Historic Site, Cascades Female Factory and Brickendon-Woolmers Estates in Tasmania. The Port Arthur Historic Site Management Authority (PAHSMA) has been given responsibility and increased resources (by the State Government) to manage the Cascades Female Factory.</p> <p>The PWS have limited resources, skills and expertise to effectively manage the Darlington precinct. A partnership arrangement with the PAHSMA would allow for sharing of knowledge, skills and practices to provide better alignment of the management, resourcing, business planning and promotion with the other convict heritage sites in Tasmania. The State and/or Federal Government would need to provide adequate resources for the partnership arrangement to be effective in the short-medium term.</p> <p>The overall responsibility for the management of Maria Island National Park should remain with PWS but the PAHSMA could provide a leadership and advisory role to support PWS in heritage conservation, visitor management and marketing within the Darlington precinct.</p> <p>The opportunity to utilise the skills and experience of any other agencies (e.g. Tourism Tasmania, Glamorgan Spring Bay Council) or bodies (e.g. Orford/Triabunna Chamber of Commerce) should be considered as part of the advisory role.</p>
DG2	Increased resources to facilitate sustainable nature-based and cultural-based tourism development, and sustainable management of the natural and cultural values of the destination.	Allow for implementation of the <i>Maria Island Conservation Management Plan</i> and the revision of the <i>Maria Island National Park and Ile de Phoque Management Plan</i> . This is crucial to have an enabling policy for improving the quality of the visitor experience and visitor services being offered in the Maria Island National Park.
DG3	Involve all key stakeholders in the implementation of the <i>TOMI Visitor Plan</i> .	This is important to engender support, and get 'buy-in' by local tourism operators and the broader community.
DG4	Review existing statutory controls affecting tourism development including Council's planning scheme, management plans and policies.	To enable policy, planning and development processes to better support the development of nature-based and culture-based tourism products, whilst ensuring that the unique values of area are not compromised.



No	Strategies for Destination Governance	Rationale
DG5	Review existing statutory controls affecting tourism development including Council's planning scheme, management plans and policies.	The tourism industry should be pursued as a sustainable alternative industry to support the TOMI community and local economy, especially given the downturn and loss of jobs in other industry sectors.
DG6	The existing Project Steering Group continue to meet to aid the implementation of the Visitor Plan, and ensure consistency among the stakeholder organisations responsible for the various actions.	Continuation of the Steering Group will keep the document 'alive', and enable it to more easily updated as situations change. However it is important that strategy DG7 be implemented to facilitate and support the Project Steering Group.
DG7	Investigate the opportunities to obtain funding to employ a part time project manager to oversee the initial implementation of the Visitor Plan, including coordination of the Steering Group.	The project manager may only be required for the first 18 months of the implementation period, The Tasmanian Community Fund is an example of an organisation with an annual grant program, which includes funding for positions such as the proposed project manager.

### 3.6.2 Strategies for Destination Development

No	Strategies for Destination Development	Rationale
DD1	Adopt a tourism development framework for the TOMI area.	<p>There is currently no strategic framework to help define the role, function and priority for investment of places and infrastructure within the TOMI area. A proposed framework should be based around the need to identify:</p> <ul style="list-style-type: none"> <li>• gateways;</li> <li>• hubs;</li> <li>• touring journeys; and</li> <li>• experience tours.</li> </ul> <p><u>Gateways</u></p> <p>Gateways are the entry points into the destination. The major gateways for visitors to Tasmania are the regional airports and Spirit of Tasmania. The gateways for East Coast Tasmania are along the Tasman Highway with key entry points being at St Helens in the north, Swansea (via Lake Leake Road) and Orford in the south. The principal gateways for the TOMI area are at both Orford and Triabunna on the Tasman Highway. Buckland is considered to be a minor gateway.</p> <p><u>Hubs</u></p> <p>Hubs are generally well-developed centres that offer visitor services and amenities all year-round. Hubs have visitor infrastructure and facilities such as transport links, visitor centres, and a range of accommodation choices, guided tour services, banking and retail services. The major hub within the destination is Triabunna, as it is the main service centre for the area, as well as being the access point to the core attraction, Maria Island National Park. Orford also acts as an important supporting hub with dining and accommodation services, Darlington Vineyard and beaches. Buckland is a minor service hub with retail services and accommodation.</p> <p><u>Touring Journeys</u></p> <p>The touring journeys offer an experience in their own right whilst playing a primary role in linking destinations, attractions and hubs within the area. The key touring journeys are the East Coast Escape, connecting Buckland in the south to St Helens in the north along the Tasman Highway. Freycinet and the Bay of Fires are the core destinations along the East Coast Escape touring journey. The Wielangta Forest Drive is a secondary touring journey between the Arthur Highway on-route to Port Arthur/Tasman Peninsula and the broader East Coast.</p> <p><u>Experience Tours</u></p> <p>The experience tours are not touring routes but rather the bundling of tourism products to create tours for tailored to the core visitor market/s. The Maria Island Walk is an example of leading experience tour within Tasmania and the region. The link to Maria Island by the ferry or the eco-cruise boat is the beginning of an experience tour suited to both day-trippers and overnight visitors.</p>

No	Strategies for Destination Development	Rationale
DD2	Undertake a review of the market needs and requirements (e.g. a business case) for a Government assistance/support package based on a fees-for-service model for the Maria Island ferry service.	This is essential in order to establish a viable, affordable and quality ferry service, which has the capacity to run all year round, at regular intervals, and to meet customer needs and improved security for the operators. A longer-term vision is required to help build tourism growth around meeting customer needs.
DD3	Revitalise and transform the town of Triabunna as a major service hub for the TOMI area that will attract higher visitation, encourage longer stays and increase yield.	This strategy reviews the findings of the draft <i>Triabunna/Orford Structure Plan</i> (Urbis 2011). The improvements would include installation of town entry signage/features, redevelopment of Charles Street as the new entry road (e.g. this alignment makes better connection to the waterfront and town centre), major streetscaping improvements to connect the town arrival experience (to the entry roads, High Street to the waterfront), interpretation and public art, continued improvements to visitor facilities and services at the waterfront.
DD4	Upgrade the Wielangta Road experience (e.g. improved signage, low-key visitor facilities, interpretation).	Whilst it is unlikely that there will be funding to allow for the sealing of the road surface, it is important that the forest drive experience be upgraded to facilitate a more direct connection between the Tasman Peninsula and the TOMI area. This might include improved directional signage on the Arthur Highway and Orford, upgrading visitor facilities enroute at picnic/walk locations, upgrading interpretation facilities at these locations, as well as improving the road surface.
DD5	Upgrade the Darlington jetty and associated visitor facilities on Maria Island.	The current jetty has to be structurally upgraded within the next 5-10 years. The upgrade should be designed to cater for ferry services, PWS needs and visiting boats. It should also include infrastructure that will improve the visitor experience (e.g. shelter for visitors waiting for the ferry, improve access and egress safety) and any specific use requirements of PWS, ferry service, operators and the public.
DD6	Identify visitor infrastructure and services improvements that could be sensitively introduced to Maria Island. This could include the sensitive re-use of heritage buildings, including for small-scale commercial opportunities (e.g. partnership between PWS and a private operator to provide visitor services), or guided tours of Darlington WHA for aimed at day visitors.	The provisions of the current <i>Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan 1998</i> appear to support and provide for low-key recreation and tourism upgrades and developments, of a type and scale appropriate to the island setting, and the need to maintain the integrity of the natural and cultural values. However the review of the management plan should assess the potential need for appropriate re-use of historic buildings, improved transport for mobility impaired visitors, new toilets, improved camping/accommodation, improved food and beverage services, improved bicycle hire services, innovative interpretation and general information). These improvements should be considered with a particular focus on facilitating a quality day visit. It also recognises the changing age profile and mobility of some visitors to the island.

No	Strategies for Destination Development	Rationale
DD7	Resolve the ongoing dredging issues with access to the Triabunna wharf/marina area	There is a need to improve access for the ferry, larger pleasure vessels, fishing fleet and to provide long term security for the working port, and the capacity to develop and market Spring Bay as the best and safest port and marina on the East Coast of Tasmania. Currently DEDTA (Department of Economic Development Tourism and Arts) are considering feasibility work in relation to marine infrastructure for the entire East Coast, which would include the potential to identify the extent of dredging and other issues associated with Triabunna port.
DD8	Support the implementation of proposed tourism projects that have the potential to be a major development catalyst for the local tourism industry.	The development of these proposed projects, located near the waterfront at Triabunna, would improve the capacity of the town to attract passing-by visitors, increase local spend and also promote the competitive strengths of the TOMI area e.g. Maria island, cultural and natural values, impressive boating/sailing waters of the coast.
DD9	Support and encourage the development of quality food and beverage services within TOMI.	There is scope to better utilize the quality of locally produced food (e.g. seafood, fruit) and beverage (e.g. wine) as part of the visitor experience across the local tourism industry and within experience products. Bundling of local products and services is another way in which tourism development can benefit the local community. Sourcing and promotion of local products and services also builds a foundation of authenticity.
DD10	Encourage the building of existing tour products and new products that are strongly aligned with the Tasmania and regional tourism brands.	The motivational research undertaken for Tourism Tasmania highlighted for the strong visitor appeals as being coastal nature, heritage and wilderness - TOMI has the potential to deliver new experiences related to these appeals.
DD11	Continue to support and encourage the development of new visitor facilities, tour products and activities	There are a number of opportunities to add to the visitor experience within the TOMI area e.g. improved trails, scenic lookouts, feasibility of the Old Convict Road and convict probation station, improved access to Home Point lighthouse, improved motorhome infrastructure, development of festivals and events to promote the area, motorcycle and bicycle friendly, promoting water activities (e.g. sea kayaking), Spring Bay seafood experiences, marine farm tours etc. However the viability of future commercial investment will be influenced by the success in addressing the critical issues facing tourism growth in TOMI.

No	Strategies for Destination Development	Rationale
DD12	Prepare a thematic interpretation strategy for the Tasmanian WHA convict heritage sites	This work is currently taking place and will provide the scope to integrate associated tourism product and the delivery of key messages and information across the convict sites.
DD13	Implement the Freycinet Cycling Strategy	The Strategy sets out 5 objectives – encourage the development of quality cycling experiences and product, develop appropriate infrastructure to support cycle tourism and local communities, support and extend the cycling events program for Freycinet, position Freycinet as Tasmania's top cycle tourism destination and foster local support for cycling and cycle tourism. Opportunities within TOMI may include a shared trail between Orford and Triabunna, upgrading the Old Convict Road, as well as enhancing footpath connections between destinations within towns for both walkers and cyclists (including mountain bikers).
DD14	Support training, accreditation, business skills, marketing and interpretive skills development within the TOMI area.	There should be a focus on developing tourism products and visitor services, which are founded on best practice environmental principles, and contribute to community building and viability. Tourism should, in some way, contribute to the improvement of the quality of the local environment, provide a catalyst for training and employment opportunities for local residents.
DD15	Work with the Tasmanian Aboriginal community to explore the opportunities for an Indigenous tourism product on Maria Island.	This would deliver an experience strongly aligned with the motivational appeals identified for visitors.
DD16	Identify suitable sites to better cater for the demand of the growing numbers of caravan, camping and motorhomes visiting the TOMI area.	Council needs to take a pro-active response to identifying suitable areas to meet this growing demand whilst cognisant of the recent legal findings that basic fees should be charged. There are a number of sites currently being used on an informal basis within the TOMI area.
DD17	Establish working party with education representatives to improve resources to better meet the needs of school groups to Maria Island.	In recent years, Maria Island has lost significant school group visitors, which is considered to be due to increased ferry costs and limited development of support resources/facilities/services to cater for the changing needs of school groups.
DD18	Foster opportunities for increased residential and holiday home development within the TOMI area that will support local businesses and spend.	There is capacity for continued residential subdivision and development within the TOMI area consistent with statutory planning controls. This will assist local businesses and create some opportunities for local employment in the future.

### 3.6.3 Strategies for Destination Marketing

No	Strategies for Destination Marketing	Rationale
DM1	The local tourism industry become fully committed to buy-into and support for the TOMI area as part of the successful and well-developed Freycinet destination branding and marketing strategy in the short to medium term.	Whilst some local tourism industry and community members have reservations about being under the Freycinet destination brand, the reality is that TOMI has very limited capacity at present to become well-branded as a competitive stand-alone destination. The TOMI area has limited product and visitor services, only a small number of operators, limited resources for marketing and promotion campaigns that will make an impact. The idea for TOMI to create its own brand and identity will rely on the capacity of the local tourism industry to provide substantial funds to identify, develop and manage brand development so it can be competitive in the market place. The costs are significant and until such a commitment is available from the local tourism industry, TOMI is best served in the short to medium term by being a committed partner to the successful Freycinet marketing campaign positioning the Maria Island Coast.
DM2	Consult with the Hobart and Surrounds Marketing Group about co-operative marketing opportunities.	The local tourism industry must be an active partner in regional co-operative marketing opportunities to influence and achieve the benefits of collaborative use of marketing and promotional resources. It is valuable to foster greater collaboration between local and regional tourism industry members in marketing campaigns to achieve maximum benefits.
DM3	Ensure that the TOMI area has a well-designed and integrated internet presence.	This should include a dedicated website (including links from East Coast or Freycinet Coast websites, PWS website), where there is consistency of messages and information. It is important that the local tourism industry investigate the ways in which the TOMI area can incorporate new technology and media into products and marketing.
DM4	Focus on re-building and developing the Maria Island experience to better cater for the key target markets; day visitor market, school groups, independent/self catering adventure (including backpackers) and family/social group market (mainly intrastate).	These are considered to be the best prospects markets to focus on for reversing the continued decline in visitation to the Island. This will require action being taken on the identified major inhibitors to tourism growth within the TOMI area – especially the ferry service and revitalisation of Triabunna as a stronger service hub. For example, to strengthen the school group market may require special group ferry rates, improved group camping facilities on the island, and specialised educational facilities and programs. This market could also be extended into the low season.
DM5	Explore the opportunities to package Maria Island (e.g. Darlington Precinct) as part of the Tasmanian Convict Sites WHA.	This would include the possibility of a joint ticket 'package' to the convict sites and the opportunity to jointly promote and market the experience (e.g. internet, brochures, interpretation, ipod downloads etc), as well as ensuring consistency of interpretation and experience development across the sites.

No	Strategies for Destination Marketing	Rationale
DM6	Assess the opportunities for developing and promoting the use of Maria Island National Park and Marine Reserve for education, research and volunteer conservation programs.	The National Park and Marine Reserve offer scope for growing volunteer conservation tourism programs in collaboration with tourism partners.
DM7	Investigate opportunities to enhance the role of the Visitor Information Centres in the marketing of the area.	<p>There are opportunities for the Triabunna Visitor Information Centre to work more closely with local tour operators, accommodation businesses, and the PWS (e.g. to better promote and provide information about the Maria Island visitor experience).</p> <p>This may also include liaison with other Visitor Information Centres, as well as at the main gateways to the East Coast Region (Hobart and Launceston).</p>





## **SECTION 4**

### **IMMEDIATE ACTION PLAN FOR 2011-2012**

#### **4.1 REALITY OF IMPLEMENTATION**

It is recognised that implementation of the recommended strategies will be very much dependent upon political commitment, the level of industry support, available resources and funding and the opportunities to tap into outside funding sources.

Section 3.2 has identified a number of major inhibitors to tourism growth in the TOMI area. It points to the need for intervention to bring about change that will help create a more positive environment for the existing tourism industry to not only survive given current market trends, but also the potential to attract future investment that will strengthen TOMI as a visitor destination. A failure to recognize and address these inhibitors will place the existing tourism industry at risk in the future with failing infrastructure, continued decline in visitor numbers, loss of new investment and the prospect of growing unemployment numbers.

It also recognised that there are significant constraints for all levels of government in being able to fund the identified strategies for the TOMI area.

Consequently it is important to take a pragmatic assessment in the Action Plan as to what can realistically be implemented in the short term. For the purposes of the study the short term is considered to be the next 18 months (June 2011 – December 2012), however many of the recommended actions will require ongoing commitment beyond this time period.

It is recommended that implementation progress on the short term action plan be reviewed every 6 months. Based on the evaluation of the implementation program for the short term, a new action plan will then need to be prepared with the opportunity to act upon the remaining strategies identified within the TOMI Visitor Plan.

The Actions Plan identifies:

the recommended strategy and actions to be taken to implement the strategy;

the collaborating partners that need to be involved;

how the strategy responds in relation to the identified key target markets for TOMI; and

the key performance indicators for evaluating implementation progress.

The following acronyms have been used for partners within the Action Plan:

GSBC	Glamorgan Spring Bay Council
PWS	Parks and Wildlife Service
PAHSMA	Port Arthur Historic Site Management Authority
TT	Tourism Tasmania
OTCC	Orford/Triabunna Chamber of Commerce
DEDTA	Department of Economic Development, Tourism and Arts
FCTB	Freycinet Coast Tourism Board
MAST	Marine and Safety Tasmania

## 4.2 SHORT TERM ACTION PLAN 2011-2012

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DG1	A new management partnership arrangement with the PAHSMA be considered for future planning, development and management of the Darlington precinct within Maria Island National Park.	<ul style="list-style-type: none"> <li>The State Government undertake consultation and negotiations with the PAHSMA and the PWS about the potential for a management partnership role.</li> <li>Resource requirements to facilitate this role over a 3 year period be determined.</li> <li>Agreement between collaborating partners in place.</li> <li>Review of outcomes from partnership management arrangement to be undertaken on yearly basis and at end of 3 year period.</li> </ul>	PWS PAHSMA	Improved visitor management of the Darlington precinct will increase the appeal and activities to both day visitors and overnight visitors.	<ul style="list-style-type: none"> <li>Consultation and negotiations undertaken</li> <li>Management partnership role and resources agreement in place</li> <li>Management partnership arrangement is operating at start of 2012</li> <li>Review undertaken of the management partnership outcomes on a yearly basis for 3 years</li> </ul>

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DD2	Undertake a review of the market needs and requirements for a Government assistance/support package based on a fees-for-service model for the Maria Island ferry service	<ul style="list-style-type: none"> <li>Independent review by State Treasury of the sustainability of the ferry services, past and current financial arrangements and the options for alternative funding arrangements such as fees-for-service package that will deliver customer needs</li> <li>Establish operating requirements to be met for fees-for-service ferry services</li> <li>Invite commercial tenders for delivery of a fees-for-service ferry services</li> <li>Negotiate contracts with preferred ferry service operator</li> </ul>	PWS TT State Treasury	The establishment of a viable, affordable and quality ferry service which has the capacity to run all year round, at regular times and to meet customer needs is expected to grow the day market visitors to the National Park. It will also provide improved options and experiences that will assist school groups, friends/family groups.	<ul style="list-style-type: none"> <li>State Treasury completes review</li> <li>Financial package for the fees-for-service arrangement determined</li> <li>Tenders called and preferred ferry service operator selected</li> <li>New basis for Maria Island ferry service in operation as at start of 2013</li> </ul>

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DD3	Revitalise and transform the town of Triabunna as a major service hub for the TOMI area that will attract higher visitation, encourage longer stays and increase yield	<ul style="list-style-type: none"> <li>Support the funding application for these works as a Regional Development Australia Fund with the Federal Government (currently being co-ordinated by Tourism Tasmania).</li> <li>Source other potential funding sources for the program.</li> <li>Prepare a master plan for guiding improvements and landscape enhancement</li> <li>Seek development approval for all works with relevant bodies</li> <li>Instigate a main street enhancement program with involvement of retail owners and other land owners</li> <li>Review other entry signage into the TOMI area (e.g. information bay at Orford) to upgrade information on visitor attractions, activities and services</li> </ul>	GSBC TT OTCC	This action will improve the appeal of Triabunna and awareness of access to Maria Island to all visitors including the key target markets. It will also influence repeat visitation to the TOMI area, increase spend in the town, and provide a catalyst for other tourism-related opportunities.	<ul style="list-style-type: none"> <li>Submission to RDAF completed and submitted</li> <li>Master plan completed by end of 2011</li> <li>Development approvals for planned works completed in 2012 with works commencing by June 2012</li> <li>Take-up of the street enhancement by land owners</li> <li>New town entry and gateways using Vicary Street and Charles Street in place by end of 2012</li> <li>Future surveys indicate improved satisfaction (residents and visitors) with the upgraded signage and enhancements</li> </ul>

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DD5	Upgrade the Darlington jetty and associated visitor facilities on Maria Island	<ul style="list-style-type: none"> <li>Undertake structural assessment of the Darlington jetty to identify required works and cost estimates</li> <li>Undertake consultation with key stakeholders to ensure various needs and requirements are considered as part of development and upgrading of facilities</li> <li>Design of proposed works</li> <li>Prepare EIA for the proposed new works</li> </ul>	PWS OTCC	This is the start of a major infrastructure project that will need to be resolved within the next 5 years.	<ul style="list-style-type: none"> <li>Design and costs estimates for proposed new jetty and infrastructure identified by end of 2012</li> </ul>
DD7	Resolve the ongoing dredging issues with access to the Triabunna wharf/marina area and Orford area	<ul style="list-style-type: none"> <li>Support the DEDTA plans for undertaking feasibility work in relation to marine infrastructure for the entire East Coast, which would include the potential to identify the extent of dredging and other issues associated with Triabunna port and Orford.</li> <li>Undertake investigations and determine needs and priorities including the dredging issues in Triabunna and Orford</li> <li>Implementation program for of the priorities prepared</li> <li>Funding strategy for priority works in place</li> </ul>	DEDTA GSBC MAST Hobart Ports	This action will help provide some security for regular ferry, boating and ecotourism operations in future years.	<ul style="list-style-type: none"> <li>Background research and marine investigations to establish extent of dredging concerns and ways to mitigate/manage improvements based on priority needs across the East Coast</li> <li>Priority and implementation plan for resolving Triabunna port and Orford dredging concerns identified by end of 2012</li> </ul>

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DD12	Prepare a thematic interpretation strategy for the Tasmanian WHA convict heritage sites	<ul style="list-style-type: none"> <li>Support the current preparation of the thematic interpretation plan</li> <li>Identify the opportunities for the Darlington precinct to deliver the messages and the media and resource requirements</li> <li>Seek funding for the implementation of the plan</li> <li>Installation of recommended works and services</li> </ul>	PWS PAHSMA TT	The interpretation plan will be a strong driver for enticing day visitors to Maria Island. It will also enhance the visitor experience of the school market and family/friends camping market on the island.	<ul style="list-style-type: none"> <li>The priority recommendations of the thematic interpretation plan are funded by the end of 2012</li> <li>Evaluation of the implementation of the plan on an annual basis following start of implementation</li> </ul>
DD13	Implement the Freycinet Cycling Strategy	<ul style="list-style-type: none"> <li>Build partnership arrangements with identified primary and secondary partners</li> <li>Commit resources to the implementation of the Freycinet Cycling Strategy</li> </ul>	GSBC State Government agencies Tourism industry Community	Range of opportunities identified including touring cyclists, event cyclists, mountain bike riders and recreational cyclists.	<ul style="list-style-type: none"> <li>Partner arrangements in place before end of 2011</li> <li>Preparation and implementation of the identified projects within the Action Plan</li> </ul>

Ref	Strategy	Recommended Actions	Collaborating Partners	Response to Key Target Markets	Key Performance Indicators
DD15	Identify suitable sites to better cater for the demand of the growing numbers of caravan, camping and motorhomes visiting the TOMI area.	<ul style="list-style-type: none"> <li>Council to identify potential sites that would meet the needs of these users</li> <li>Development approval be sought for the use of any identified sites</li> <li>Upgrading of basic facilities at the identified sites</li> </ul>	GSBC OTCC	This is primarily aimed at catering for the key camping, caravan and motorhome market.	<ul style="list-style-type: none"> <li>Site(s) selected that are appropriate for over-flow use</li> <li>Development approval for the site(s) achieved</li> <li>Upgrading of the sites and basic facilities</li> <li>Monitoring of use and collection of revenue based on fees</li> </ul>
DM3	Ensure that the TOMI area has a well-designed and integrated internet presence	<ul style="list-style-type: none"> <li>Review the existing TOMI area internet offer</li> <li>Consider opportunities for realigning the messages to fit with brand, core appeals from motivational research and links to other key sites</li> </ul>	OTCC FCTB TT GSBC	This will improve access and communications for all visitors but also allows for specific information packages to be designed to cater for the key target markets e.g. day trippers to Maria island, school groups, family/friends camping groups and the camping/caravan/motorhome markets.	<ul style="list-style-type: none"> <li>Review the internet offer in light of the TOMI Visitor Plan and current market research findings (e.g. motivational research appeals)</li> <li>Increased links to other websites</li> <li>Increased hits on the website</li> </ul>



**ATTACHMENT 1**  
**REVIEW OF BACKGROUND REPORTS**



## TOURISM TASMANIA STRATEGIC PLAN 2010-2013

Tourism Tasmania's Strategic Plan sets out five key goals and 14 key priorities, which aim to deliver the strategic direction, and inform the organisations actions over the next three years. The five goals are:

- 1. Maximise Tasmania's tourism potential*
- 2. Drive demand for Tasmania* (e.g. "further develop our regional/zone marketing strategy, harnessing the strengths of each region")
- 3. Foster the supply of tourism products and experiences* (e.g. "work with industry groups and sectors to develop products and experiences that are consistent with and align with the brand promise", and "Work with the regions in regard to the development of distinctive experiences relevant to the strengths of each marketing zone")
- 4. Enhance industry's competitive position with market-leading research and analysis*
- 5. Be a highly effective organisation*

The Plan also incorporates an overview of current trends in global and local tourism, such as the following observation – of relevance to the TOMI region:

*"More travellers than ever are seeking 'responsible' tourism options, and the desire to 'leave the world a better place' has seen the rise on the popularity of authentic experiences that support local communities and the environment"*<sup>22</sup>

## TOURISM 21: STRATEGIC BUSINESS PLAN 2007-2010

The Tourism Industry Council Tasmania's Strategic Business Plan sets out an organisational vision and core strategies. The vision is:

*"Building the value of tourism for the Tasmanian tourism industry, the community and the wider economy"*

The core strategies are:

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<sup>22</sup> Tourism Tasmania Strategic Plan 2010-2013, Page 4.

*Create a highly desirable destination* (e.g. building on strengths such as our natural environment, beauty and peacefulness, supporting the PWS to manage our environment – the core of Tasmania’s promise to its visitors, and improving tourism infrastructure);

*Market the destination effectively* (e.g. taking advantage of new communication techniques, saturating the internet with information about Tasmania);

*Make it easy to travel* (e.g. expressing the Tasmanian experience online, including booking systems, and working with airlines to offer new direct destinations from Tasmania); and

*Deliver on the promise* (e.g. developing partnerships to deliver better experiences, and raising standards and professionalism).

#### REGIONAL TOURISM REVIEW – THE WAY FORWARD 2010

The Regional Tourism Review for Tasmania highlights a number of observations relevant to tourism planning and development in the East Coast and TOMI region, including:

the need for simplified regional tourism planning structure (e.g. fewer organisations and layers);

a high level of local cooperation, commitment and volunteerism in the regions, but also lack of clarity and duplication of effort); and

the current approach to regional tourism places too much focus on marketing and promotion, at the expense of skill and infrastructure development, and product/experience development.

#### DRAFT TRIABUNNA/ORFORD STRUCTURE PLAN 2011

The future vision for Triabunna and Orford is:

“Triabunna and Orford will provide a sustainable lifestyle and destination choice that realises the potential of their natural assets and links to convict, maritime and forestry history”

Triabunna's future will focus in

The relevant opportunities identified in the Structure Plan for Triabunna included:

- strengthening the link with the Maria Island ferry service;

- rejuvenating the town centre, including enhancing view lines to the waterfront and Maria Island;

- promoting the linkage from the Tasman Highway into the town;

- enhancing the port/marina area, including deep water port access, visual and physical improvements, and opportunities for 'boatels'; and

- promoting and enhancing heritage buildings.

The opportunities identified for Orford include:

- promoting historic connections (e.g. Old Convict Road);

- upgrading centrally located tourist accommodation; and

- capitalising on seasonal population influx during the summer months.

#### VISION EAST 2030 – THE EAST COAST LAND USE FRAMEWORK 2009

Some of the issues identified in the Framework with the potential to affect tourism development in the region include the:

- difficulties of maintaining water quality and supply (e.g. many settlements outside the main town do not have reticulated services);

- predicted impacts of climate change, and the potential implications for the local climate and environment values (e.g. severe weather events, sea level rise and associated impact on coastal areas);

- need to secure viable and sustainable industries are needed to provide employment for the local population;

limited public transport to, and within the region, and the condition of some roads (e.g. gravel roads) in the area; and

need to ensure that tourism development does not threaten the environmental and cultural integrity of reserved land (e.g. National Parks).

The Framework also incorporates vision statements for both the broader East Coast, and the Glamorgan Spring Bay municipality:

The East Coast vision is:

*“To enhance the community and economic potential of the East Coast, maintain its natural and cultural heritage assets and values as a living environment, and establish a hierarchy of service centres with appropriate transport linkages to the region and between the settlements”*

The Glamorgan Spring Bay vision is:

*“Increase diverse employment opportunities by encouraging appropriate development of key towns, whilst protecting residential amenity, unique environmental features and significant tourism assets”*

## ATTACHMENT 2

### TOURISM TRENDS

Tourism Trends	Implications for tourism in Tasmanian and the TOMI Area
Increasing affluence in developing countries	The wealth of developing countries will continue to grow, coupled with a growth in consumption and a desire to travel. Countries with emerging middle classes include Brazil, Russia and India, and China, are likely to become increasingly important international source markets for Tasmania. These travellers are likely to have a lower level of awareness about Australia, Tasmania and the TOMI area, and therefore innovative marketing based around the right messages will be important.
Projected increases in international travel	Global travel is easier than it has ever been. International travel is expected to double by 2020 <sup>23</sup> - again China is at the forefront of this trend. This means that Tasmania and the TOMI area will have to compete with myriad other destinations. The TOMI area must position itself in a way that reflects the desires of the key market segments, and be innovative, authentic and capitalise on the strengths of the region. However, this increasing trend could be adversely affected in the longer-term by factors such as rising oil costs and an increasing awareness of environmental issues, and the impacts of travel.
Low cost airlines	Global travel is easier – and cheaper than it has ever been before. Many more people can afford to travel more often, due in large part to the growth in the number of low cost airlines. Low cost airlines are also an important factor in the observed decrease in domestic travel, with international travel becoming affordable to a broader section of the socio-economic spectrum.
Decline in domestic travel	<p>The decline in domestic travel may be attributed to several factors, including the Global Financial Crisis, low cost airlines to overseas destinations and the strength of the Australian dollar. International travel is an attractive and affordable alternative to intrastate/interstate holidays, and considered good value for money. The Global Financial Crisis has resulted in a shift away from non-essential spending (e.g. drop in disposable income) for many of Australia's traditional international source markets (e.g. USA, Britain) and this is having an impact on the amount people spend on travel, and the frequency they undertake holidays.</p> <p>This trend is particularly relevant to the study area, as the intrastate and interstate markets are major market segments for the TOMI area. The TOMI area will be competing to capture domestic visitors from well-known international destinations.</p>
Rising oil costs (oil crisis)	It is expected that oil costs will continue to rise, given recent (although hotly debated) predictions relating to the depletion of easily accessible oil resources. Tasmania is at the 'end of the Earth' for the majority of international travellers. Increased travel costs, particularly following a period of affordability, could act as a deterrent for travellers otherwise interested in visiting Australia and Tasmania. Rising oil costs could also impact flight scheduling, and the ease with which visitors can access the island, as well as the affordability of hire vehicles. This may be relevant to the TOMI area – given most East Coast visitors travel via their own vehicle or a hire vehicle.

<sup>23</sup> Tourism Tasmania (2009) *Lighthouse Report Three: New Trends in Global Travel*.

Tourism Trends	Implications for tourism in Tasmanian and the TOMI Area
Environmental awareness and demand for sustainable tourism	<p>There has been a burgeoning interest in environmental, as well as social justice issues, driven in part by increased media coverage and political attention. The concern about environmental issues (e.g. the projected impacts of climate change) are translating to new demands and expectations for tourism operators. A growing number of visitors want to feel that their holiday is not placing unacceptable burden on the local environment, or adversely impacting the lives of local people. They want to feel that their dollar is contributing in a positive way to 'sustainability' and that they are 'treading lightly' on the place in which they have chosen to holiday. Volunteer tourism is an extension of this, where visitors pay to be involved in a conservation or other type of project that directly benefits the local environment and community.</p> <p>The TOMI area is characterised by a rich coastal and hinterland environment, and has the opportunity to benefit from this "green shift"<sup>24</sup> in tourism, with low-impact and innovative tourism experiences, which are sensitive to the local environment, and clearly benefit a local community in need.</p>
Climate change	<p>Following on from the above trend, climate change has become the number one environmental and scientific debate of recent years. Data published by the (International Panel on Climate Change) IPCC strongly supports the case for anthropogenic climate change, with sophisticated modelling providing insights into the projected global long-term environmental and social implications.</p> <p>Travel contributes to climate change mainly through the production of CO<sub>2</sub> (e.g. long-haul flights in particular, but including other forms of motorised transport, as well as the production of goods and services). Many travellers are concerned that their travel choices are contributing to global climate change, and are increasingly factoring such considerations into their travel choices.</p>
Ageing population	<p>The global ageing trend driven by the Baby Boomer generation, is reflected in national and state demographic data – with Tasmania in particular having a higher proportion of the population represented in older age groups in comparison to other Australian states. People are living longer, and staying healthier for longer, representing an increasingly significant segment of the tourism market. The needs of older people will need to be increasingly considered in the design and delivery of contemporary tourism experiences.</p> <p>The growth in motorhome tourism is an example of this trend. Motorhome visitation to the TOMI area, and more broadly the East Coast, is already significant. The local community have recognised the need to better cater for this market, through the provision of suitable services and facilities.</p>

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<sup>24</sup> Ibid



Tourism Trends	Implications for tourism in Tasmanian and the TOMI Area
Increased technology sophistication and personalisation	<p>The internet has brought about significant changes in the way in which we access information about places we are interested in visiting, and the way in which we book and organise our holidays. It has facilitated independent travel and increased flexibility. Ease of access to information through communication technology media also means that visitors are better informed about a destination pre-visit, and will have formed expectations about the type of experience they want before they arrive. In general, the majority of travellers are much more savvy when it comes to communications technology – in particular the use of the internet, than in the past.</p> <p>Re-vitalisation of the tourism industry in the TOMI area provides an opportunity to explore new technologies, and apply them in innovative ways to local tourism opportunities. This may include the application of new technologies to information provision and interpretation, or to the design and development of innovative infrastructure and services.</p>
Increasing demand for authentic, personalised and experience-rich tourism	<p>No longer is the 'build it and they will come' mentality an adequate means of attracting visitors to a destination. Travellers in general, have higher levels of awareness and education, as well as expectations about what the experience offers on a personal level.</p> <p>Increasingly visitors are seeking tourism experiences that are authentic (e.g. true to the location/environment and local culture), are personalised and offer an element of exclusivity (e.g. not a 'mass market' approach), where they can interact, learn and undertake an activity first hand in an intimate setting.</p> <p>The TOMI area must focus on developing a local tourism industry that responds to the demand for these traits – where tourism is integrated with the local community and draws on the strengths of the local environment and culture.</p>



**ATTACHMENT 3**  
**MAJOR CHALLENGES FOR TOURISM**  
**GROWTH IN TOMI**



The major inhibitors for the destination are considered to be:

- Limited competitiveness of the destination
- Unsustainable ferry service
- Gaps in Infrastructure and visitor services
- Resource and management limitations
- Legislative and policy requirements

#### LIMITED COMPETITIVENESS OF THE DESTINATION

Despite the richness of the natural, cultural and 'sense of place values', TOMI faces significant challenges to growing its visitor market.

TOMI is not yet established or recognised as a major visitor destination and it will take time to build and develop market-ready experiences that allow it to be truly competitive. The Maria Island Walk is already a leading and award winning product but other products will need to be strengthened and refreshed, while new products will require considerable lead-in time for development, marketing and securing acceptance by the travel industry. Currently there is little incentive for tourism investment given the decline in current visitors, global financial uncertainty and high risk associated with gaining returns in such a competitive tourism market.

The area will be competing with well-developed and established Tasmanian destinations including Hobart, Freycinet, Launceston, Cradle Mountain and the West Coast to capture market share of day visitors, overnight stays and spend. Apart from the Maria Island Walk product, the destination has yet to create a strong market leader that will effectively compete with any of these other destinations. It will take major investment in infrastructure, product and marketing to achieve recognition within the market place. This problem is exacerbated by the relative isolation of its core attraction - Maria Island National Park, and the limited accessibility to meet the needs of the customer market.

Whilst the tourism industry operating within the TOMI area is well connected through the Orford/Triabunna Chamber of Commerce, it is characterised by many small-scale operators with limited resources to grow their businesses. The small-scale nature of the existing tourism industry means that there are limited funds available for marketing,

restricting the ability to contribute to marketing campaigns pitched at existing and new visitor markets.

The industry is primarily geared toward the summer season, with gaps in visitor services outside of these periods. The quality of customer service and access to information also varies within the TOMI area.

There are few iconic commercial products that are market-ready and showcase the TOMI area. While there are opportunities for the industry to develop new iconic experiences or take existing products to the next level, this will take considerable time and investment.

The sinking of the Troy-D has failed to capture commercial tourism interest or significant private scuba-diver use. The reality is that there are plenty of dive-wreck experiences available around Australia and overseas and that this site does not offer anything special or compelling to the diving market. The location has also added to the accessibility difficulty including no mooring. It indicates that visitors can no longer be relied upon to simply visit any attraction if it does not meet their expectations and drive their motivations to visit.

#### U N S U S T A I N A B L E   F E R R Y   S E R V I C E

Discussions with previous ferry operators, existing operators and interested parties indicated that the Maria Island ferry operation is not a viable business operation without government support. This issue has been an ongoing concern given the falling passenger numbers, increased operating costs, seasonal visitation, price-sensitivity of the core markets (e.g. school trip, local Tasmanians and day users), limited services and range of issues with existing jetties, freighting capacity, visitor carrying capacity and the suitability of the boats being used.

An Expression of Interest (EOI) process was undertaken by the State Government in 2005 in order to improve the quality and consistency of the ferry service. The first operator ceased operating the ferry service in 2007 due to low passenger numbers and the realisation that it was an unviable business venture. The next ferry operator had to significantly increase the base fare in 2008 to help cover operating costs of a higher quality ferry operation (e.g. larger vessel) providing more regular and efficient services. The business was subsequently sold to the current operator and the base fares have been maintained.

Another operator is offering an alternative access service to Maria Island as part of a boat tour operation, however this service is weather

dependent given the limitations of the boat being used. There is a real risk that both of the current operators will suffer loss of business as a result of this competitive situation within a small market.

A basic subsidy has been provided by the government to the various ferry operators over the winter period – this has been reduced to 2 days a week. However, the subsidy has not changed the reality that the ferry service is a high-risk business venture. The decline in passenger numbers over recent years has accelerated problems with private enterprise seeking to build a viable ferry service.

The core of the problem is that Maria Island will not regain or substantially grow its visitor market unless a viable, affordable and reliable ferry service is not fully integrated with customer demands for a year round and consistent ferry service. The current visitor market will not sustain a viable ferry service and thus accessibility will be a major deterrent to growing visitor numbers. The core markets – school trips and day users – are price sensitive and want value for money with a ferry service that fully meets their needs. It was widely considered by many stakeholders that the current fee levels, combined with the Parks entry pass was a major inhibitor to these markets and that the decline in visitor numbers in recent years has reflected this.

The responsibility for resolving this issue rests with the State Government as it cannot be fixed by Local Council or the private sector alone. A more realistic funding model is needed to support a private ferry operation, and to provide a realistic incentive for gaining a longer-term return on the investment in a reliable and affordable ferry service.

#### GAPS IN INFRASTRUCTURE AND VISITOR SERVICES

There are a number of significant gaps in infrastructure and visitor services that have and will continue to limit the potential for tourism growth of the TOMI area. These include:

- the capacity for a year-round reliable and regular ferry service to Maria Island to meet customer needs;

the closure of Wielangta Forest Drive since 2009 due to the need to replace Robertson Bridge as this has prevented direct visitor access between the regional destinations of East Coast and the Tasman Peninsula<sup>25</sup>;

Wielangta Forest Drive is a gravel road built in partnership between Forestry Tasmania and Gunns Limited - being unsealed does limit some visitor access due to the high use of hire vehicles and high insurance premiums associated with use of such roads – however it is recognised that there would be major infrastructure costs involved in sealing of such a road in the future;

the need to upgrade wharf facilities and to improve the capacity and functionality of the existing Triabunna port facilities to better cater for the requirements of the ferry service, local commercial tourism operators, fishing industry and recreational users;

the need for dredging a better channel entrance to the existing port facilities at Triabunna to service the ferry service, local commercial tourism operators, fishing industry and recreational users;

the existing Darlington jetty has an expected operational life of only 5 years and will require replacement works to service the ferry, PWS and other boat users given the exposure to prevailing seas and winds;

the resources to implement the *Darlington Settlement and Point Lesueur Conservation Management Plan* and protect the outstanding values associated with the Australian Convict Sites World Heritage Listing;

the need to upgrade visitor arrival experience, facilities and services that are required to improve Triabunna as a gateway and destination e.g. entry signage, streetscape, public toilets and waterfront paths;

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<sup>25</sup> The State Government announced in November that it would provide funding to construct a replacement for Robertsons Bridge. The road is expected to be open to the public by late March 2011.



the development of new attractions to extend the appeal and yield from the visitor market e.g. Spring Bay Maritime and Discovery Centre;

limited tracks and trails; and

limited frequency of public transport services to the TOMI<sup>26</sup> area.

There are a range, albeit limited, of web-based and print collateral currently promoting activities, accommodation and attractions within the TOMI area. However, the majority of this information is product-specific and has not been developed within an integrated concept of a regional or TOMI experience that transcends the destination.

Collateral does not relate to the region or the TOMI area as a whole. Pre-visit information in digital or print form is also limited, unless the visitor has a specific location in mind.

Interpretation does not feature strongly throughout the TOMI area. Maria Island National Park and individual towns within the area communicate messages about natural and cultural heritage values but these do not generally have a strategic focus. Communicating key messages will help visitors to form meaningful ideas about the TOMI destination and a lasting sense of personal connection. However, a Thematic Interpretation Strategy is under currently being prepared for the Tasmanian Convict Sites WHA – Brickendon-Woolmers Estates, Cascades Female factory, Coal Mines Historic Site, Port Arthur Historic Site and the Darlington Probation Station.

#### RESOURCE AND MANAGEMENT LIMITATIONS

The Tasmanian Parks and Wildlife Service manages the Maria Island National Park with relatively limited resources, given the diversity of natural and cultural values, and competing users interests associated with the island. Its remote location means that costs are always high, as materials and skills/services need to be transported on and off the island. The infrastructure is old and constantly in need of maintenance, repair or replacement. The requirements to work within the constraints of a management plan and conservation policies adds to the time, cost and processes that need to be followed. There has been very limited funding

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<sup>26</sup> Tassielink provide a daily service between Hobart and the East Coast with two buses a day (8.50am and 4.05pm departing Hobart) Monday to Friday, one bus on Sunday (departing Hobart 11am) and no service on Saturday. Return services are available from Bicheno and Swansea on similar days. There are some local bus hire and charter operators available within TOMI.

and limited access to specialist skills to effectively conserve the heritage assets over a long period of time. As a consequence some of the historic buildings, such as the Brickfields are failing to be adequately maintained.

Resource and funding constraints have significantly limited the capacity of PWS to undertake desired improvements to visitor facilities and services over time. This includes improvements such as providing better interpretation, information, developing an education package, boat moorings, guided walks/tours, upgrading the campsites and other camping opportunities on the Island, restoration of buildings, wastewater treatment and upgrading of tracks.

The listing of the Darlington Probation Station on the Australian Convict Sites World Heritage List will challenge the State Government and the Tasmanian Parks and Wildlife Service to find the appropriate resources, business skills and heritage management expertise required to effectively manage these sites on a sustainable basis. It is likely that a new management approach will need to be considered in order to conserve the values for which the site had been listed, and to fully develop the tourism potential of the site.

Consultation with tourism operators indicated the view that the local tourism industry would benefit from the PWS having a better understanding of the dynamics of operating commercial business in such a place. PWS have prepared a *Business Enterprise Plan 2010-2013* that sets out key activities, performance targets and budgets for the next three financial years. It acknowledges the decline in visitation, problems with the ferry service, limited maintenance resources and that the quality of visitor experiences have fallen. However these issues are symptomatic of the TOMI area and are partly outside of PWS influence and budget – it will require a whole-of-government approach to deal with these issues and if so, this would allow for a more successful and integrated business plan. The reality is that both PWS and tourism operators are seeking better outcomes for access, use and management of Maria Island for the visitor market, but the lack of adequate resources and effective processes are frustrating both in achieving this.

Council also has limited resources to implement and maintain major tourism infrastructure improvements within the TOMI area, and has to rely on the support of Government to fund new initiatives.

## LEGISLATIVE AND POLICY REQUIREMENTS

A substantial range of legislative and policy requirements relate to use and development of land within the TOMI area. In addition to the development requirements of local planning schemes, there are also requirements arising from State legislation and policies, parks and reserves management plans, lease/license requirements, which relate to public protected areas and their use for commercial tourism.

Tourism operators have indicated frustration in progressing tourism development proposals, leases and licensing application/renewal process for commercial operations within protected areas. The isolation of Maria Island National Park has added to the complexity of the process and required the Tasmanian Parks and Wildlife Service to deal with a multitude of infrastructure, planning and approval requirements.

A review of the current *Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan 1998* was undertaken as part of the background research for this project. The implications for recreation and tourism planning and development on the island have been considered, in light of the age of the statutory management plan.

The principle management objectives<sup>27</sup> (Section 15.1) for the Park and Reserve are primarily focused on protecting and conserving natural and cultural values, but do refer tourism and recreation:

“Conserve and maintain, in perpetuity, the marine and terrestrial biophysical processes and biodiversity of the Park and the Reserve, including indigenous species, communities, ecosystems and genetic diversity;

Conserve the geological, geomorphological, pedological, hydrological, scenic and landscape features of the Park and Reserve;

Protect and retain the elements of culturally significant past use of Maria Island National Park, and the layering of evidence documenting the major periods of Aboriginal use, exploration, convict settlement, industrial development, pastoral pursuits and dedication as a national park;

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<sup>27</sup> Tasmanian Parks and Wildlife Service (1998) *Maria Island National Park and Ile Des Phoques Nature Reserve Management Plan*, page 47.

Protect and retain the elements of culturally significant past use of the Ile des Phoques Nature Reserve; and

Protect and preserve the special recreational and tourism character of the Park as an island removed from and attractively distinct from the everyday world in the rest of Tasmania”.

The Associated Objectives<sup>28</sup> (Section 15.2.) of relevance include:

Provide recreation and tourism opportunities and facilities based on appreciation and enjoyment of the environmental, heritage, recreation and educational values of the Park; and

Enrich visitor experiences of the Park values through education an interpretation.

The following Table summarises the policies and actions from the current management plan considered to be most relevant to the TOMI Visitor Plan. In general, the provisions of the management plan appear to support and provide for low-key recreation and tourism upgrades and developments, of a type and scale appropriate to the island setting, and the need to maintain the integrity of the natural and cultural values.

Whilst the management plan is due for review to bring it in line with the new (draft) General Management Plan (e.g. standardised approach to zoning), and the recent World Heritage Area designation of Darlington, there appear to be few significant barriers to the types and scale of recreation and tourism developed proposed in the TOMI Plan, or identified by PWS through other processes.

The listing of the Darlington Probation Station on the Australian Convict Sites World Heritage List will have implications for any future tourism use of the site and its buildings. The potential re-use of buildings within the area consistent with protecting the WHA heritage and site values is likely to be possible but adding new structures or works that may conflict with such values would not be approved. This is consistent with best management practice with WHA listed sites and is important for retaining the integrity of the site's inherent values. The major inhibitors for tourism investment within TOMI and especially on Maria Island will seriously

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<sup>28</sup> Tasmanian Parks and Wildlife Service (1998) *Maria Island National Park and Ile Des Phoque Nature Reserve Management Plan*, page 48.

question the viability of future commercial tourism development in the short to medium term.

The responsibility for management of the natural and cultural resources within the TOMI area must be recognised as a shared responsibility involving land managers, government agencies, tourism industry and the wider community.



Section in Management Plan	Policies Most Relevant to the TOMI Plan	Actions Most Relevant to the TOMI Plan	Implications
18.4 Roads and Vehicular Tracks	<p>Bicycles will only be permitted on designated roads and vehicular tracks, and subject to the code of practice for their use on Maria Island, in limited other locations</p> <p>Motor vehicle use on the island will only be permitted for Park management or study centre purposes</p>	Prepare and disseminate and enforce a code of practice for the use of bicycles in the Park	<p>Restricts bicycle access, however, the policy refers to "limited other locations", which provides the opportunity to designate other trails or areas for bicycle use. The existing network of gravel roads and trails provides a good scenic 'touring' experience.</p> <p>Prohibits potential for limited visitor transport (e.g. bus, golf buggies for mobility impaired visitors).</p>
18.5 Walking Tracks	<p>Priority will be given to upgrading existing tracks before any new tracks are constructed</p> <p>Walking tracks will not constructed in the Natural Zone unless monitoring of routes indicates the need for minimal surfacing and drainage</p> <p>Where feasible, some wheel chair access will be provided around the Darlington Zone</p>	Consider short to medium length circuit historic and nature walks within or linked to the Darlington Zone	<p>Provides for improved mobility impaired access in the Darlington Precinct.</p> <p>Development/improvement of short to medium walks in the Darlington area is consistent with the recommendation to improve the day visitor experience.</p>
19.4 Marine Conservation	Control mooring and anchoring to prevent damage to the Marine Zone	The need to review this policy would potentially allow for improved access by visiting boats/yachts at Darlington and other points on the island.	See Section 23.6 Visitor Services and Facilities in the Marine Zone.

Section in Management Plan	Policies Most Relevant to the TOMI Plan	Actions Most Relevant to the TOMI Plan	Implications
19.8 Managing Human Impact	<p>A maximum party size of thirteen for overnight parties will be encouraged in the Recreation Zone</p> <p>A maximum party size of eight for overnight parties will be encouraged in the Natural Zone</p> <p>The maximum party size for licensed day or overnight tours in the Recreation Zone will be thirteen, with a maximum of ten clients and at least one guide per five clients</p> <p>The maximum party size for licensed day or overnight tours in the Natural Zone will be eight, with a minimum of two guides per party</p>	Provide minimal impact toilets in designated visitor areas	<p>Provides opportunity for further guided tour operations appropriate to the setting and sustainable management of the islands values.</p> <p>Number restrictions are not seen as a negative, but rather will aid in ensuring that visitors receive a quality experience of the remoteness, quiet and naturalness of the island.</p>
21.1 Aboriginal Heritage	Do not publicise sites of Aboriginal significance unless the site has been assessed, in cooperation with the Aboriginal community, for educational or interpretive use	Develop interpretation of the Aboriginal heritage of Maria Island in consultation with the Aboriginal community	Will add depth to the visitor experience of the island – the Aboriginal story is not well-told or understood at present.
21.2 Historic Heritage Management	<p>Adaptations will be readily reversible and new services will not be apparent from outside buildings, or impact on them</p> <p>Future developments and uses in any heritage precinct or site will benefit its conservation as an historic place or, at least, not detract from this</p> <p>Except in facilities and services areas, new stand-alone buildings will not be permitted in heritage precincts or sites</p>	-	<p>Restricts the capacity to develop new accommodation or other visitor infrastructure within the Darlington precinct in particular. However these policies are likely to conform with the recent WHA designation of the site.</p> <p>The TOMI Plan supports appropriate re-use of existing buildings but does not recommend the develop of new, stand-</p>



			alone visitor buildings within heritage precincts, but rather focuses on improving facilities and services for day visitors and existing low-key overnight markets.
22 Interpretation and Education	<p>Interpretation programs and facilities will mainly be concentrated in the Darlington and, to a lesser extent, Point Lesueur Zones.</p> <p>The three themes of interpretation will be:</p> <ul style="list-style-type: none"> <li>Maria Island is a complex and layered landscape</li> <li>Maria Island is an example of the evolutionary nature of how people interact with the environment</li> <li>Maria Island has been influenced by isolation</li> </ul> <p>Subject to the recommendations of the relevant conservation and interpretation plans, interpretive facilities may be located in historic buildings</p> <p>Interactive interpretation programs may be developed</p> <p>The annual summer interpretation program will be continued as funds permit, focusing on providing a range of interpretive activities for visitors.</p>	<p>Provide prospective Park visitors with pre-visit information at Louisville Point and any other major departure points</p> <p>Place pre-visit brochures with tour operators</p> <p>Train and assist ferry operators to provide information to visitors</p> <p>Upgrade interpretation in Darlington for day visitors</p> <p>Implement and regularly review the interpretation plan to guide development of interpretation facilities in the Park</p> <p>Develop interpretation of the Aboriginal heritage of Maria Island in consultation with the Aboriginal community</p> <p>Provide interpretation about the marine environment</p> <p>Investigate establishing a multi-purpose research/field study/education centre, in consultation with relevant groups and organisations</p>	<p>All policies and actions are considered appropriate at a higher level, and provide the means to improve visitor information and interpretation. The thematic interpretation plan under preparation for the WHA convict sites should be a guiding document on the delivery of messages related to these values (both on and off the island).</p>

Section in Management Plan	Policies Most Relevant to the TOMI Plan	Actions Most Relevant to the TOMI Plan	Implications
23.1 Developing and Managing Tourism and Recreation	<p>The tourism and recreational themes for Maria Island National Park will be:</p> <ul style="list-style-type: none"> <li>Attractive and accessible flora, fauna and landscapes</li> <li>Authentic and undisturbed Aboriginal and historic heritage</li> <li>An atmosphere of quietness, solitude, and contrast with the everyday artefacts of modern life</li> <li>An island experience of separation and isolation</li> </ul> <p>Consistent with this management plan, tourism and recreation facilities and services will be provided, principally in the Darlington and Point Lesueur Zones</p> <p>The range of visitor facilities provided will complement rather than compete with those which are or could be provided in nearby mainland areas and departure points to the island</p> <p>In providing for visitors, emphasis will be placed on essentially self-sufficient overnight and day use of the Park</p> <p>Darlington will be the major visitor centre with overnight and day facilities and services</p>	Develop and implement a tourism and recreation strategy for the Park, consistent with this management plan	The policies are broadly consistent with the recommendations made in the TOMI Plan (e.g. strengthening the current self-sufficient overnight visitor markets, enhancing the day experience in Darlington, and strengthening the Triabunna/Orford area as the main tourism service hub).
23.3 Visitor Services and Facilities in the Darlington Zone	<p>In accordance with the conservation plan (Godden Mackay, 1995), the Mess Hall will be used for visitor services and activities</p> <p>Provided it accords with the recommendations of a conservation plan, parts of the Penitentiary may continue to be used for visitor accommodation</p>	Prepare a site plan for the Darlington Zone	<p>Provides for the development of further low-key accommodation on the island, including re-use of some of the historic buildings.</p> <p>Also provides for the potential opportunity for a (temporary) standing camp or similar.</p>

In accordance with the conservation plan (Godden Mackay,1991), Bernacchi's Terraces may be restored for visitor accommodation

In accordance with the conservation plan (Godden Mackay,1995), parts of the Coffee Palace may be restored for visitor accommodation

The provision of hostel-type accommodation, bunk house, and self-contained accommodation, consistent with the prescriptions of this management plan and the site plan, will be considered

Other than works approved by a relevant conservation plan, construction of new accommodation developments will be limited to the facilities and services area A to encourage integration of visitor services and facilities at concentrated development sites

Facilities and services area B may allow, and will be limited to, marine research, marine tourism and interpretation facilities, and provision or upgrading of management and public landing facilities, including information, toilets and public shelter

Ferry-based provisioning, and guided tours and hire services in the Darlington Zone, consistent with the prescriptions of this management plan and the site plan, will be encouraged

The sale, within the Commissariat Store, of souvenirs and memorabilia focused on Tasmanian made merchandise directly related to the features and values of the Park will be encouraged

In the Darlington Zone, camping will be available only in camping areas designated by the managing authority

Temporary standing camp, equipment cache, or similar accommodation or services provisions may be considered in the

	facilities and services area A, but not elsewhere in the Darlington Zone		
23.4 Visitor Services and Facilities in the Point Lesueur Zone	<p>The provision of hostel-type, bunk house, simple "wilderness" lodge, and similar styles of accommodation, consistent with the prescriptions of this management plan and the site plan, will be considered</p> <p>Construction of new permanent accommodation developments will be confined to the facilities and services area A</p> <p>Subject to environmental assessment and conditions, temporary standing camp, equipment cache, or similar accommodation provisions may be permitted in the Point Lesueur Zone, located within the facilities and services area B, inland from the farm house at French's Farm</p>	Prepare a site plan for the Point Lesueur Zone	Provides for the opportunity to further develop low-key visitor accommodation in the Point Lesueur Zone, including 'permanent accommodation' as well as temporary standing camp.
23.5 Visitor Services and Facilities in the Recreation Zone	<p>Facilities in this Zone may be developed to the level of walking tracks, vehicle tracks for management purposes, designated camping areas with environmentally minimal impact toilets, roof water collection from them, and signs</p> <p>Existing provisions for visitors in this zone will be maintained but not significantly extended</p> <p>Buildings for accommodation purposes will not be permitted in the Recreation Zone</p> <p>In the Recreation Zone, camping will only be permitted in camping areas designated by the managing authority</p> <p>Subject to environmental assessment and conditions, temporary standing camp, equipment cache, or similar accommodation provisions may be permitted in the Recreation Zone at two sites only, located within 500 metres of any actual or potential public</p>	-	Prohibits accommodation in Recreation Zone, but provides opportunity for temporary standing camp.

	<p>camping area at Four Mile Creek or Trigonía Corner</p> <p>Equipment caches approved for this Zone before 1995, and implemented within three years of approval, will be permitted</p>		
23.6 Visitor Services and Facilities in the Marine Zone	<p>Facilities in the Marine Zone may include underwater interpretation trails, boundary markers, mooring points, and navigation buoys, markers and lights</p> <p>The existing jetty location at Darlington will be the only one permitted in the Zone</p> <p>Licensed dive tours may be permitted in the Marine Zone</p> <p>Motorised water sports, including jet skis, water skiing, and power boat racing, will not be permitted in the Marine Zone</p> <p>Moorings will only be permitted when required for management or when approved by permit by the Director for licensed recreation or tourism operation</p> <p>Moorings for private use will not be permitted</p>	Provide interpretation about the marine environment	Sets out a clear process for the installation of moorings, particularly for non-management purposes (tourism operator). This could have implications for the viability of a proposed marine-based tourism operation.
23.7 Visitor Services and Facilities in the Natural Zone	<p>No visitor buildings or similar facilities will be provided in the Natural Zone</p> <p>Temporary standing camp, equipment cache, or similar accommodation provisions will not be permitted in the Zone</p>	-	Prohibits any structures or built development in this zone.