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THE STAFFORD GROUP

EAST COAST DESTINATION MANAGEMENT PLAN

Prepared for East Coast Regional Tourism Organisation Inc.

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EXECUTIVE SUMMARY

1.1. OVERVIEW

The Stafford Group (The Group) was commissioned by the East Coast Regional Tourism Organisation (ECRTO) to develop a Destination Management Plan (DMP) for the East Coast region. The DMP draws together the findings of extensive consultation with a cross section of stakeholders and community and the results of in depth qualitative and quantitative research.

As an outcome, the DMP provides recommendations for both product development and marketing initiatives to help grow the East Coast tourism industry in a sustainable manner.

1.2. CONTEXT

The DMP is the first to be undertaken for a region in Tasmania and potentially will offer the East Coast the advantage of identifying a variety of product development opportunities and having these supported by Tourism Tasmania and other key stakeholder groups first. Every effort should be made to capitalise on this position.

Like all regions in Tasmania, the East Coast has suffered a decline in visitation. Over the last 4 years visitation has declined by 15% whilst over the last 10 years it has fallen by 12%.[1]

The East Coast is characterised by macroeconomic issues resulting in a lack of industry sectors to stimulate employment growth, including the closure of agricultural processing plants (the Triabunna Wood Chip Mill) and the demise of the commercial fishing industry. Despite a variety of economic initiatives undertaken by the two local government authorities in the East Coast region (Glamorgan Spring Bay Council and Break O'Day Council) and the support of the Tasmanian State Government, the region has struggled to generate positive economic outcomes.

[1] For year ending September 2012. East Coast Tourism Profile Summary, Tourism Tasmania

Whilst a mixture of agricultural (primary industry) activities do show support for the farming-horticultural based sector[2], tourism is recognised by both Councils and State Government as the primary potential driver of economic growth and community support for the East Coast Region.

However, based on the ABS 2011 Census data, approximately 20% (600) of 3,063 jobs on the East Coast are actually in tourism and hospitality. As the Census data is collected in August (the low season), this may account for what appears to be a lower representation of tourism related jobs. We suspect however, that regardless of seasonality, tourism and hospitality employment on the East Coast possibly averages roughly 26% of total employment throughout the year. The opportunity therefore exists to significantly grow this employment sector by extending the visitor season and developing more product.

1.3. KEY ISSUES

The Group has undertaken a detailed literature review, has undertaken four field trips to the region and has viewed and discussed issues with a variety of stakeholders both within the East Coast region and externally. The key issues (rather than all issues) identified are noted as follows (not in priority order):

- The major tourism stakeholder in the region is the Tasmania Parks and Wildlife Service who manage high profile national parks including Freycinet National Park, Maria Island National Park, Douglas Apsley National Park, the Bay of Fires Conservation Area and the Blue Tier Forest Reserve. The State Government agency has limited resources to further enhance visitor infrastructure and to market to the national parks of the region;
- The vast majority of larger size (30+ room commercial accommodation establishments) would appear not to have been refurbished for some time and owners appear reluctant to commit capital for this in the current economic climate;
- There are no major commercial based visitor attractions (but a number of smaller and medium sized operators), no large scale resorts[3] or hotels, no significant transport operators (though we note there is a charter flight operator) so there are limited private sector operators with significant marketing funds to help leverage off which puts added pressure on local councils to partner with the RTO;

[2] Expansion of the viticulture industry (which links well with tourism) and unique higher value crops such as poppies for the pharmaceutical industry.
[3] Though not a large resort White Sands Resort will offer some recreational elements of a larger resort when fully developed though its room stock is limited at 29 accommodation units, though a new wing is planned.

- A significant number of tourism operators appear to be lifestyle operators[4] rather than full commercial players;
- The effective tourism season for many operators is only a 3 - 5[5] month period which significantly impacts on profitability, occupancy levels and achievable yield;
- A number of tourism businesses in the region are actively on the market to be sold. As a result, there are a number of for sale marketing sign boards which give the impression that the region may have problems for business;
- The quality of food and beverage services, as well as accommodation in particular, is highly variable[6] and many establishments (including general food and beverage retail) appear to be charging high prices without a commensurate quality of product or service;
- The region is characterised by a substantial number (estimated at 55%) of absentee property owners (shackies) who have holiday homes on the East Coast and, without more in depth research, their economic benefit is hard to quantify; and
- Travel via air and ferry services is at times perceived as expensive[7], particularly when booked with a relatively short lead time prior to departure[8]. This therefore is seen to potentially discourage spontaneous travel to the region as well as limiting the region's ability to market itself as a short break destination for Sydney, Melbourne and Brisbane markets in particular. It also needs to be recognised that at times there are cheap airfares available but that these are quickly taken up.

[4] Lifestyle operators denotes those operators not open all year round, often with alternative income streams, sometimes being semi retirees operating to keep active rather than with a desire to operate as a fully commercial operation, often with smaller scale operations (less than 5 room accommodation operations etc.).
[5] This is often over the Christmas – New Year January – February period, during Easter school holidays and during long weekends. At best for many operators the effective tourism season runs from December – April and the low season is so quiet that many close over May – August.
[6] When compared to cafes and restaurants of all standards in major tourism areas such as Hobart, Launceston etc. the east coast is characterised by outlets charging the same prices as in major cities in Tasmania and on the mainland but not necessarily with the commensurate level of food quality, service offered or ambience of surroundings.
[7] Based on feedback gathered during the consultation phase for this project, for work done in other parts of Tasmania (specifically, Launceston and the Cradle Coast), as well as regularly comparing on line cost comparisons of flights to various domestic destinations. The cost of bringing a car and caravan or car and trailer on the ferry across Bass Strait is seen as expensive and may be the reason that those who do bring their car across to Tasmania tend to stay longer to partially support this cost of their journey. The cost of flights and ferry services (with a vehicle) do not actively encourage impulse travellers or short lead booking times.
[8] Some accommodation operators offer previous guests email updates on cheap airfares to encourage repeat visits.

1.4. MAIN FINDINGS

Whilst the issues identified above highlight some significant challenges, there are a variety of opportunities which should be capitalised upon including:

- Many parts of the region offer a stunning coastline and natural environment to leverage off;[9]
- A small cluster of activity operators (charter boat, sea kayaking, four wheel bike tours etc.) operate out of Coles Bay and reflect a degree of industry cooperation as well as effective links into the surrounding national parks. Successful collaboration is therefore occurring in Coles Bay to the benefit of consumers and operators and needs to duplicated in other parts of the region;
- Towns such as St Marys which are on a main access route across to the coast from the Esk Highway have product development opportunities which could encourage more people to stop, spend and stay longer in the region;
- A number of viticulture businesses are establishing in the region which in time could offer a boutique food and wine trail experience though this would be highly seasonal;
- St Helens is noted as the fishing capital of Tasmania and with the town's picturesque setting, there are opportunities to potentially develop the waterfront area as a vibrant tourism precinct for businesses which could support water based activity all year round;
- The opportunity may exist[10] to create a series of coastal walkways and cycle ways along the East Coast and encouraging packages of 2 - 3 nights (or longer) whilst staying in suitable accommodation in various towns (St Helens, Scamander, Bicheno, Swansea, Coles Bay, Triabunna, Orford);
- Triabunna could eventually offer a major marina base[11] for many intrastate and interstate visitors but a staged approach is needed to match supply and demand;
- Opportunities to potentially develop a golf trail circuit[12] utilising existing golf courses in the region and potential new golf courses are being assessed for the region; and

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[9] Whilst this in itself may not offer a compelling reason to visit it should encourage the same quality of built attractions and amenities to be offered to compliment the high quality natural environment. The challenge is that so much of Tasmania offers attractive landscapes.

[10] This concept needs a feasibility study to ensure it is commercially viable to develop as a commissionable product. Whilst it can also be a free walking experience the region lacks sufficient commissionable product to leverage off.

[11] Feedback from Glamorgan Spring Bay Council indicates that support exists at State Government level to support the marina development and that the first stage of marina berths have already been pre sold.

[12] The country courses which would make up the golf circuit offer enough challenges for the average golfer rather than those coming to Tasmania to play top courses such as Barnbougle. This concept for the east coast is more akin to a hackers trail.

- Potentially expanding the experiences one can do within the national parks either through the introduction of more day experiences or potentially for high quality overnight eco-tent camps in less sensitive areas and which can be easily monitored for impacts. Feedback from Parks and Wildlife indicates an underutilisation[13] of most East Coast national parks and reserves (other than at peak times and with the exception of the Bay of Fires).

1.5. OPPORTUNITIES / RECOMMENDATIONS

1.5.1. PRODUCT DEVELOPMENT OPPORTUNITIES

The following reflects the priority product development opportunities identified in this DMP:

- Development of a food trail (noting it would be seasonal) throughout the region to promote the produce[14] which is developed across the East Coast;
- Assess the creation of a small cluster of seasonal cooking schools[15] which have programs for both adults and children and which utilise and promote East Coast produce;
- Strengthening of the Bicheno Food and Wine Festival and expanding into other seasonal experiences such as the winter long lunch, a fishing festival centred on sea and river seafood etc.;
- Creation of golf trails and integrated packages which link up the 7 courses in the region with transport, accommodation and dining packages noting that these are for the average golfer rather than the more experienced player looking for signature courses;
- Facilitate discussions with Parks and Wildlife to assess the ability to develop high quality eco-accommodation (glamping) in the national parks and reserves within the region which is based on market demand research[16] and where this is less likely to negatively impact on local ecology;
- Develop the full potential of Maria Island to expand visitation from the current 12k visitors to its estimated carrying capacity of 28k once appropriate supporting infrastructure is established;
- Waterfront development at St Helens, including the development of a sports fishing interpretation centre including mixed used development and the relocation of the visitor centre;
- Investigate shoulder season potential for whale watching (November-December) tours;
- Continue to liaise with cruise ship operators to develop the East Coast for possible stop overs;

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[13] With the exception of camping sites at the Bay of Fires and parking facilities at Freycinet during peak periods only all east coast national parks and conservation areas have spare visitor capacity and at times significantly spare capacity levels
[14] Whilst there is currently limited produce there is sufficient to commence a food and wine trail and to build from this.
[15] This concept involves utilising existing facilities throughout the region rather than building new infrastructure. It also reflects on the interest in many generating markets to visit to not only learn how to prepare new dishes but also to enjoy finding out where the produce originates from, to meet with growers, to actually pick fruit, vegetables etc. and to do these experiences as small group or family orientated experiences where visitors may be accommodated in a number of B&B's rather than one accommodation establishment. And it doesn't always necessitate the involvement of a signature chef.
[16] Feasibility and market demand studies are needed to verify that this glamping concept can work profitably in specific locations.

- Expanded marina and retail facilities at Triabunna (over a number of stages), capitalising on the deep water facility[17] that is available;
- Developing and promoting a water's edge walking track around the bay at Swansea with links to bird hides for bird watching and extending along the spit which nearly reaches the Freycinet Peninsula;
- Liaising with the wineries in the Swansea region and developing a wine trail, with potential to create wine trail packages linking in with accommodation and tours;
- Investigate feasibility to develop a wine interpretation centre at Swansea, and ideally located in a waterfront location or heritage building if possible;
- Undertake a feasibility for developing a foot bridge/cycle way or flying fox facility over the inlet entrance on Great Oyster Bay which could connect Swansea to Freycinet Peninsula;
- Development of weekend classic car displays, utilising privately owned classic cars in the Fingal Valley for display at St Marys;
- Undertake a feasibility study looking at the development of an archaeological excavation attraction at St Marys focusing on the various blacksmiths and historic sites in the town and which allows visitors to watch and/or participate under supervision;
- Encourage Break O'Day Council to undertake an assessment of main street improvement for St Marys to encourage existing cafes to offer more outdoor dining with wider footpaths and larger trees to boulevard the main street/highway entrances; and
- Whale watching opportunities which though highly seasonal and sightings can't be guaranteed but which could offer further spontaneous tour options.

1.5.2. MARKETING AND PROMOTIONAL OPPORTUNITIES

The following notes the priority marketing and promotional opportunities identified in this DMP:

- A signage strategy for the region to improve both interpretation signage (at regional entry points and for major attractions such as the Bay of Fires and the Blue Tier Forest Reserve) and directional signage to offer both distances and drive times;
- Consideration to develop a mobile application for the East Coast, or effective integration into the AppNGo model recently developed by the Tasmanian Visitor Information Network;
- The creation of a series of online bookable packages for visitors, ranging from relaxation packages to adventure packages for example and including tour options, accommodation and dining options;

[17] This is noted as the only deep water anchorage between Hobart and Eden.

- Development of a marketing and promotional program to brand St Helens in particular, as the sports fishing capital of Tasmania;
- Completion of the regional brand development for the East Coast and the application of the brand and any taglines in all collateral;
- Development of the region as a pet friendly region providing accommodation operators are willing to support this;
- Undertake review of visitor information services throughout the region to optimise efficiencies and the delivery of information to visitors and to introduce more online services to help visitors book prior to coming to the region;
- Develop a series of coastal walks/cycle tours which link in with accommodation available along the trails;
- Promotion of Buckland walking tours, including the Bluff River Walk which also needs to be better signposted;
- Promoting Triabunna as a staging post to Maria Island once additional visitor facilities are created on the Island;
- Leveraging to a greater extent off the profile of Wine Glass Bay and Freycinet National Park to grow visitation to the East Coast and encouraging more overnight visitation to use the Coles Bay/Bicheno area as a hub;
- Strengthening the link between food and beverage experiences at Coles Bay through packaging accommodation and food experiences together (based on a food trail, food festival, cooking school weekend and farm gate experiences etc.);
- Greater promotion of Bicheno as a wildlife hub for the East Coast and particularly penguin viewing tours; and
- Build promotional packages for day tours ex Hobart as pre and post conference and meeting tours.

1.6. CREATION OF TOURISM HUBS/NODES

Figure 1 illustrates the connectivity between the various towns and some of the key national parks and reserves in the East Coast. Each town (and community) has an important role to play in helping to promote and develop tourism.

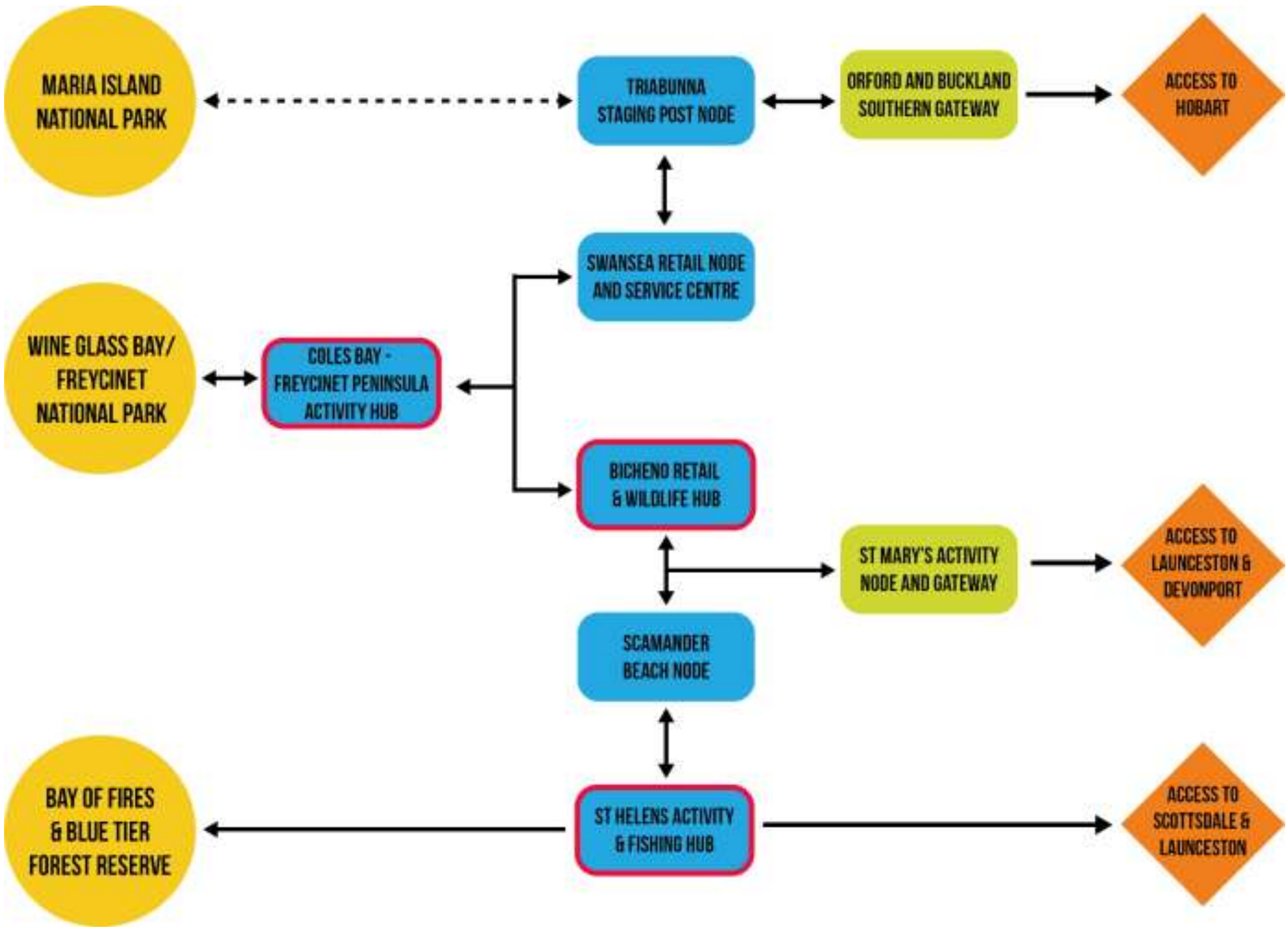
The marketability of the East Coast is significantly stronger if each town and area is linked and works in unison with one another. This DMP relies on each of the towns and associated areas strengthening their position as tourism hubs and nodes.

Councils, with the support of the RTO and State Government agencies, need to be encouraged to:

- Improve interpretative and directional signage to each town and node shown in Figure 1; and
- To consider making improvements to the streetscape and urban look and feel of each town to help strengthen its appeal to the benefit of locals and visitors and to stimulate new investment.

Success in developing tourism on the East Coast will be predicated on a true partnership model, with the RTO working closely with both Councils.

FIGURE 1: TOURISM HUBS AND NODES



1.7. GOING FORWARD

The recommendations provided in this DMP focus on the *low hanging fruit options* and identify product development and tourism investment opportunities which can be used as stimulants to refocus and motivate others in the region to enhance and upgrade their facilities and service.

To achieve sustainable success in tourism development and promotion, it is suggested for the future that:

- Councils need to focus on one primary tourism development generator for each of their respective areas and ensure that it is appropriately scaled so that it can generate private sector investment and development interest;
- The region needs to develop commercially attractive and bankable projects with far less expectation of State or Commonwealth Government intervention;
- There needs to be a stronger focus on commissionable[18] (rather than free) tourism product to help raise the standards of service and infrastructure as well as offering new product development opportunities for locals in particular. This could include sea kayaking, mountain biking tours, food trails, cooking schools, art tours etc.;
- The RTO Board needs to identify those tourism operators (across the spectrum of size and scale and subsectors) who can be at the vanguard for driving change, particularly through enhanced service standards and product on offer (the RTO needs to unashamedly pick winners);
- Parks and Wildlife have a dominant impact on the tourism marketability of the region and a partnership model is needed to achieve more effective promotion of national parks in tandem with the RTO and other stakeholders;
- Councils need to consider working far closer with DIER to improve interpretive and product signage (by way of example, there is very little signage promoting the Bay of Fires); and
- The Board of the RTO will need to decide how best to deal with the owners/investors of many of the larger accommodation establishments which need refurbishment and, in some cases, require stronger hospitality management expertise to improve service standards and product marketability.

1.8. SUMMARY

The table on the following page provides a snapshot of visitation to the East Coast as at 2012/13. It provides a base level of data for the RTO and stakeholders to build on. The figures reflect the underlying strength and importance of the holiday leisure market coming primarily from intrastate and interstate source markets.

[18] There is much free product on offer but insufficient commissionable product in the region to encourage greater support from wholesalers and intermediaries.

Overall, the table illustrates the significance of the intrastate visitor market which currently represents nearly 2/3's of all visitors to the region. The data also reflects an opportunity to expand and grow the lucrative meetings and conference market once adequate facilities are available to cater to the needs of these business and event attendees and who currently are significantly underrepresented in the visitor profile to the East Coast region.

And the table illustrates the size of the day tour market and the potential to both encourage more repeat day visitors as well as transferring these into over- night and higher spend visitors in time.

TABLE 1: EAST COAST VISITATION – MAIN PURPOSE OF VISIT[19]

2011/12 Estimated Market Share by main purpose of travel							
	Leisure o/night	Business o/night	Conference o/night	VFR/ Education/ Other O/night	Day Trippers Drive Thru	Totals	Market Share
Interstate	106,500	6,000	2,725	19,400	39,000	**173,625**	31%
Intrastate	116,000	9,000	2,000	27,000	198,000	**352,000**	64%
International	23,275	600	175	1,200	3,000	**28,250**	5%
Totals	**245,775**	**15,600**	**4,900**	**47,600**	**240,000**	**553,875**	100%
Market Share	**44%**	**2.8%**	**0.9%**	**9%**	**43%**	**100%**	**-**

In conclusion, the East Coast offers some exciting prospects for sustainable tourism development and growth. This will however require addressing some fairly major challenges, including the current ten year decline in visitation and the lack of adequate investment in product and services over some time.

Success will also be predicated on developing strong working partnerships with both Councils, relevant State Government agencies and building the active involvement and support of tourism operators and the communities along the East Coast.

[19] The data is a compilation from a variety of sources. It has been cross checked with a number of industry stakeholders. Some data is directly sourced from TRA (and is based on a June year end) and other data is from Tourism Tasmania sources (and is based on a September year end). Most importantly, this data set provides the RTO with a starting point to monitor visitation and industry performance.

2. INTRODUCTION

The Stafford Group (The Group) was commissioned by the East Coast Regional Tourism Organisation (ECRTO) to develop a Destination Management Plan (DMP_ for the East Coast region. This report reflects the key findings from consultation and desktop research and provides a number of recommendations to sustainably grow the East Coast visitor economy.

Whilst many opportunities have been identified from consultation with over 110 stakeholders, the DMP focuses on those which will deliver the most sustainable outcomes within the resources available to the RTO and its stakeholders.

2.1. METHODOLOGY

The process adopted was a highly iterative process in that continuous liaison was undertaken with key stakeholders including the CEO and Board of ECRTO, Tourism Tasmania as a primary funding body, the two Councils as strong financial supporters of ECRTO as well as ongoing liaison on a number of occasions with industry, communities, investors and other government agencies.

The approach taken for this DMP involved the following:

- Initial liaison with the CEO and Board of ECRTO;
- Liaison with Tourism Tasmania to discuss statistical based information and product development;
- Industry consultation which was undertaken over 4 dedicated visits to the region;
- Liaison with investors and developers within the region and externally;
- Liaison with key government stakeholders including Parks and Wildlife as well as others;
- Liaison with industry associations (Business and Events Tasmania etc.);
- Structured meetings and presentations with both of the Councils in the region to discuss the vision for tourism, infrastructure, promotion, development and the interrelationship with ECRTO;

- Preparation of an interim DMP primarily to highlight interim issues and opportunities which need to be considered early on by the Board in particular;
- Detailed research and analysis of current and future product;
- Review of all statistical data on visitor trends and development of a base visitation scenario determined by research from various sources along with necessary assumptions which were tested and refined with input from Tourism Tasmania and industry;
- An ongoing literature review to build a robust context for the region and to fully understand projects and strategies as well as relevant government policies affecting the region;
- Meetings with the Board to discuss the interim findings and draft DMP;
- Preparation of the draft final DMP and after feedback and liaison with the Board and other stakeholders; and
- Finalisation of the DMP document.

The East Coast region does reflect a number of seasonal lifestyle operators and a clear demarcation between the needs of lifestyle operators and the needs of purely commercial tourism operators has had to be determined. With such a large percentage of absentee land owners (shackies) who often live in Hobart, Launceston, Burnie and Devonport and have holiday homes on the East Coast, we are mindful of the community constraints and abilities within the region as well as avoiding direct conflict with those who see the East Coast as primarily a holiday home (second home) destination.

There is a need to recognise that for many Tasmanians, the East Coast is a place to relax and unwind rather than a traditional tourism destination with more product offerings.

2.2. ABOUT DESTINATION MANAGEMENT PLANNING

The purpose of destination management planning is to deliver a tourism organisation with a future roadmap for tourism, by providing the tools required to develop sustainable and competitive tourism for a destination. The Destination Management Plan (DMP) is developed and organised utilising a destination's unique tourism assets as well as potential development and marketing initiatives.

Destination management planning provides a far more holistic and integrated approach to destination planning than traditional destination marketing mediums.[20] The DMP is developed based

[20] A National Framework For Best Practice Destination Management Planning, 2007, Department of Resources, Energy and Tourism.

on a comprehensive process of research within the destination, consultation, feedback, planning and review. The process involves strong involvement and participation from tourism (and other) stakeholders, local and regional tourism organisations, government (and local, state and national levels) and needs to be linked to relevant State level strategic tourism plans where these exist.

This DMP for the East Coast is the first regional DMP in Tasmania and in many respects, sets direction and an approach for the others which follow. The point of difference being the unique characteristics of assets (natural and built) and the needs and motivations of the local and regional communities.

In the case of the East Coast region, there is a careful balance needed between the desire for new innovative product and tourism investment and the desire by many (locals and shackies) to retain their way of life. The common denominator however is the desire for more sustainable employment throughout the region.

3. SITUATION ANALYSIS

3.1. THE EAST COAST REGION

The East Coast tourism region of Tasmania covers over 6,000 square kilometres of land and is home to over 10,000 residents.[21] The region comprises the Break O'Day LGA in the north and the Glamorgan Spring Bay LGA to the south. The map below highlights the primary towns in the East Coast region, along with the three National Parks.

FIGURE 2: THE EAST COAST REGION

[21] 2011 Census QuickStats, Australian Bureau of Statistics (31 October 2012)

Tourism is acknowledged as a significant economic contributor for the region, with the industry primarily centred on natural tourism assets including Freycinet National Park, Douglas-Apsley National Park, Mt William National Park, Maria Island National Park and the numerous beaches and coastal lines scattered along the two LGAs. The inland areas (with the exception of St Marys) have little tourism infrastructure.

3.2. THE IMPORTANCE OF TOURISM FOR THE EAST COAST REGION[22]

Tourism is the largest economic sector in the East Coast region, with the sector generating an estimated $102.7m annually.[23]

The generic figure below illustrates the role tourism plays in local economies.

FIGURE 3: THE BENEFITS OF TOURISM

The importance of the tourism sector for the East Coast is also reflected in the following findings:

- The tourism sector also plays an important role in employing over 20%[24] (600 residents) of residents in the East Coast.[25] This is a large percentage, given that for the State of Tasmania overall, the tourism sector only represents 7% of jobs;
- The major tourism related employment industry is accommodation and food services, which employs just over 500 individuals;

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[22] Economic data has been gathered from the Economic Impact Analysis for the East Coast Tourism Region, produced by REMPLAN, May 2013. We understand that this is a draft report and is subject to change.
[23] Based off East Coast Tourism Region – Economic Impact Analysis compiled by Remplan
[24] Whilst some have queried this figure of 600 believing it is too low, it needs to be noted that tourism is highly seasonal. As ABS data is collected in a low season period, it may be that tourism jobs are understated.
[25] Based on data collected from 2011 Census of Population and Housing

- On average, for each dollar spent by a visitor in the East Coast region, it is estimated that 71% is spent on Accommodation and Food Services, 13% by those who own dwellings (shackies) and 4% on Transport whilst the balance of 16% is comprised of petrol and other goods and services;
- For each dollar of direct visitor expenditure by visitors to the East Coast, the flow on effect, or benefit to the broader local economy is estimated at $0.40 once flow on industrial and consumption effects are taken into account (this can be expressed as a tourism output multiplier of 1.40;
- Applying the tourism industry multiplier of 1.40 to the direct output generated by East Coast's tourism sector of $102.7m, the total value of tourism to the region's economy is currently estimated at $143.8m per annum.

The role of tourism in the East Coast's economic future is articulated through the following initiatives:

- Drive the development of a unified brand and identity for the region and coordinate marketing messages. Tourism will play a key role in defining the East Coast. The story and the brand can be built through tourism;
- Promote the East Coast's outstanding environmental qualities and lifestyle factors to locals, workers and investors;
- Leverage the region's cool but mild climate with the opportunity to promote the East Coast as a winter destination for NSW and QLD visitors especially;
- Identify opportunities and undertake feasibilities for new development as well as attracting investment to grow the region's population and attraction base;
- Leverage grant funding utilising the DMP from State and National funding sources; and
- Sustain local businesses through shoulder and low periods by introducing strategies to minimise the impact of seasonality.

Understanding the importance of tourism to the local, regional and state economy and its flow on effects is crucial for growing a strong and sustainable visitor economy. Employment from tourism is spread across a wide range of industry sectors comprising retail, cafes, accommodation, manufacturing, education and transport etc.

Feedback from industry operators indicates that the most pressing problem is the impact of seasonality with many operators having to survive on a very limited 3 – 5 month season.

3.3. TASMANIAN GOVERNMENT'S ECONOMIC DEVELOPMENT PLAN

The following matrix is taken out of the Tasmanian Government's 2011 Economic Development Plan.[26] The matrix was developed as part of Goal Two of the Economic Development Plan- sector development. As part of the Economic Development Plan, a sectoral approach has been developed for Tasmania's key trade and investment industries, for which tourism is recognised.

Within the tourism sector, the following issues were identified as those which need to be addressed in order to help the sector to grow:

- Transport issues – ports and airports;
- Telecommunication issues;
- Skills and labour issues – lack of skilled labour and the cost of labour; and
- Innovation issues.

TABLE 2: TASMANIAN STATE ECONOMIC SECTOR ISSUES MATRIX

	INFRASTRUCTURE						SKILLS		INNOVATION
	Water	Controlled Waste	Transport		Energy	Telecommunication	Skills and labour		
			Ports and airports	Freight costs and logistics			Lack of skilled labour	Cost of labour	
Antarctic and Southern Ocean		X	X	X			X		X
Building and Construction							X		
Food and Agriculture	X	X	X	X	X		X	X	X
Dairy	X	X	X				X	X	X
Fruit	X		X	X			X	X	X
Red meat		X	X					X	X
Salmon			X						X
Vegetables	X		X	X	X			X	X
Wine	X		X	X			X	X	X
Forestry			X		X				
ICT						X	X		X
Specialist manufacturing			X	X	X	X	X		
Mining		X	X	X	X		X		
Mineral processing	X	X	X	X	X		X		
Renewable energy					X				X
Science and research							X		X
Tourism			X			X	X	X	X

26 http://www.development.tas.gov.au/economic/economic_development_plan/

Stakeholder feedback and overall analysis highlights the following in relation to these issues in the matrix as they affect the East Coast:

- Access to the East Coast and no direct air access is noted as a limitation which creates heavy reliance on tagging on to the strategic gateways of Hobart and Launceston;
- Limited telecommunications coverage in some areas is a limitation for operators and visitors;
- Lack of available skilled labour and the cost of securing and retaining it on the East Coast are noted as limitations affecting service delivery and front of house standards etc. Variable food and beverage quality is noted as a problem needing to be addressed; and
- Lack of investment and mediocre returns on investment are limiting opportunities for innovation and associated investment.

3.4. COMPETITOR MATRIX

The following matrix provides comparative analysis from other destinations to illustrate how the East Coast is fairing compared to other destinations with similar (but not the same) characteristics.

TABLE 3: COMPETITOR MATRIX

COMPETITOR[27]	TOTAL VISITATION	TOTAL EXPENDITURE	DAY VISITS	OVERNIGHT VISITS	AVERAGE LENGTH OF STAY[28]
East Coast Region, Tasmania	554k	$102.7m	237k	317k	3 nights
Launceston, Tamar and the North	2.3m	$674m	1.6m	693m	9.5 nights
North West Region, Tasmania	1.2m	$301m	892k	357k	5 nights
West Coast Region, Tasmania	549k	$114m	296k	253k	3 nights
Hobart and the South	2.9m	$1.1b	1.9m	1m	9.5 nights
South Coast, NSW	9,286,200	$1.97b	6,003,000	Domestic o/night: 3,178,000 International o/night: 105,200	11 nights
West Coast, NZ	2,649,697	$2.48b	1,460,245	1,189,452	2 nights

27 Unless otherwise specified: All Tasmanian data sourced from Tourism Research Australia – Regional Tourism Profile 2011/12. All South Coast, NSW data is based on data sourced from Travel to South Coast Tourism Region, Year ended June 2012, and Destination NSW and based on June YE. All West Coast New Zealand data is based on data sourced from 2006 to 2011 New Zealand Regional Tourism Estimates, Ministry of Business, Innovation and Employment and based on December YE.
28 For South Coast NSW, average length of stay is based on YE June 2012. For West Coast New Zealand, average length of stay is based on YE December 2011.

3.5. SWOT ANALYSIS

The following figure highlights the strengths to build on and weaknesses to address if the East Coast is to grow sustainable tourism and achieve the objectives desired by its stakeholders.

FIGURE 4: SWOT ANALYSIS

SWOT ANALYSIS

STRENGTHS	WEAKNESSES
▪ A highly attractive coastline which is generally easily accessible. ▪ Heritage architecture within the region. ▪ High concentration of bird life. ▪ Ease of access from major gateways (Hobart, Devonport and Launceston). ▪ Seasonable game fishing at St Helens, year round bream fishing and trout fishing (e.g. St George's River) ▪ Profile of National Parks and in particular Freycinet Peninsula and Wine Glass Bay. ▪ Top end boutique accommodation (Saffire Lodge, Freycinet Lodge, Dragonfly Lodge, Avalon Coastal Retreat and Rocky Hills Retreat etc.) ▪ Quality of some of the B&B and smaller accommodation operators. ▪ Quality of fresh produce available in the region (seafood, cured meats, jams and sauces).	▪ High seasonality (3-5 month operating season). ▪ Level of human resource capacity in the region (skills and numbers of staff). ▪ Large number of lifestyle tourism operators. ▪ Volume of accommodation product and number of rooms in need of major refurbishment. ▪ The number of tourism properties currently on the market with for sale signs. ▪ The lack of tour operators and inability to charter or hire equipment in many places. ▪ Unrealistic expectations on the size and scale of some projects. ▪ A number of development projects have been hanging around for some time and now should be reassessed or withdrawn. ▪ Lack of evening activity. ▪ Expensive and variable quality food. ▪ Expensive and variable accommodation quality. ▪ Lack of major operators with strong marketing budgets and related skills to partner with. ▪ Perception that the region is more of a weekend shack destination than a dedicated tourism region ▪ Lack of industry sectors other than tourism and elements of agriculture to stimulate economic growth.

OPPORTUNITIES	THREATS
▪ Utilise the two main berry farms' (Kate's and Eureka) to help anchor food trails. ▪ Actively encourage the major wineries getting established to support tourism marketing initiatives (agri-tourism). ▪ To focus on niche higher value product opportunities such as bird watching, walking tours, cycling tours, art and cultural based experiences. ▪ Review all events and festivals and focus on 4 (covering the seasons). ▪ Encourage waterfront mixed use development at St Helens and Triabunna (marina focussed developed). ▪ Encourage seasonal water based operators into St Helens (charter boats, sea kayaking, paddle boards etc.). ▪ Encourage Councils and state government agencies to develop the Great East Coast Coastal Cycling and Walkway (Tasmanian equivalent of the Cinque Terra - the famous 5 coastal towns walk in Italy). ▪ Encourage Parks and Wildlife to consider more high quality eco concession operators on the fringe or within National Parks to help stimulate greater visitation.	▪ Inability to sell off much of the out dated accommodation stock leading to significant perception problems for the East Coast. ▪ Continued economic decline limiting reinvestment into the industry. ▪ Further closure of local businesses. ▪ Failure to stimulate one catalyst project in each of the 2 Council areas. ▪ Inability to get Parks and Wildlife to partner on promoting the national parks and expanding product opportunities. ▪ Inability to improve the ability to access local seafood and agricultural products at reasonable prices within the region (direct to consumers).

SWOT ANALYSIS	
OPPORTUNITIES	**THREATS**
▪ Improve access to Maria Island including lower priced packages for walking tours. ▪ Re-assess the scale of the Greg Norman Golf Course, 600 home sites & 250 room resort hotel at Orford. ▪ Develop a website for the RTO with industry product and portals to link to Tourism Tas, Parks and Wildlife and others. ▪ Actively encourage operators/investors of most of the larger accommodation establishments to either refurbish or sell to meet the market. ▪ Investigate the potential for a cluster of golf courses on the East Coast (St Helens, Bicheno, Orford, Swansea, Moorinna and Freycinet and promote golfing tours). ▪ Investigate the cost and potential of upgrading the air strips at St Helens and Freycinet. ▪ Investigate the conversion of an existing building in St Marys for a classic car interpretation centre and as a starting point for car club events or look at weekend classic car events in St Marys. ▪ Investigate potential for archaeological digs focused on all the old blacksmith workshops etc. in St Marys ▪ Opportunity to capitalise on and value add on the shackies market through boutique holiday rental/marketing agencies	

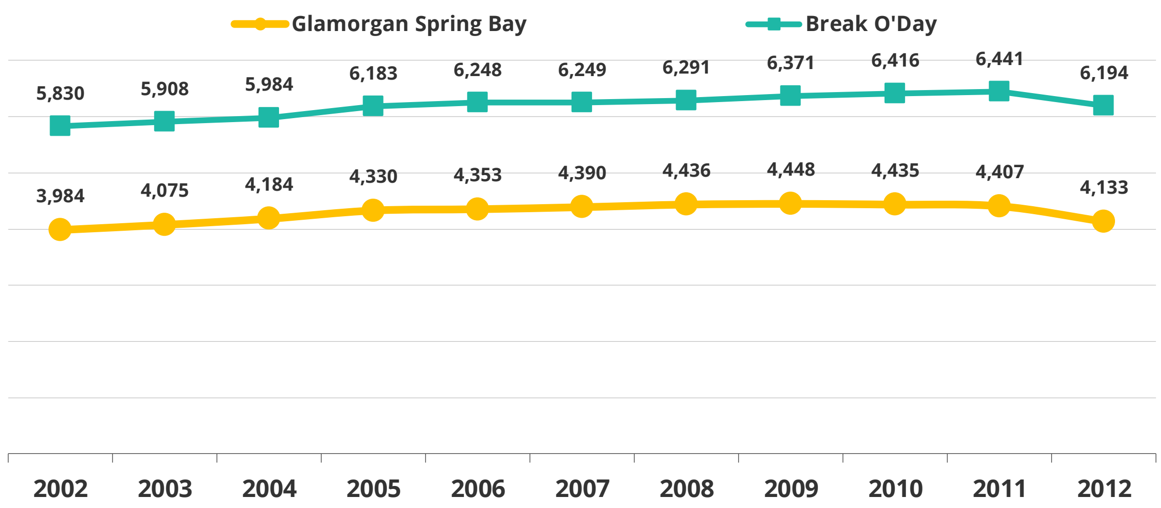
3.6. THE EAST COAST POPULATION

The East Coast region has a highly seasonal population, with the number of residents increasing significantly (often tripling) during the summer season when shackies use or rent out their holiday homes.[29]

Over the past 10 years, the population of both the Glamorgan Spring Bay LGA and the Break O'Day LGA have slightly increased, growing by 4% (149 residents) and 6% (364 residents) respectively though there are concerns in both Councils, that without stronger population growth, an ageing population will create greater economic challenges. Both Councils are keen to encourage greater economic development to stimulate greater employment and support existing community infrastructure. Tourism and related investment is recognised as offering the greatest economic driver to achieve this.

[29] http://www.gsbc.tas.gov.au/webdata/resources/files/GSBC_A_R_2012_FINAL3_LOWRES.pdf

FIGURE 5: EAST COAST POPULATION[30]

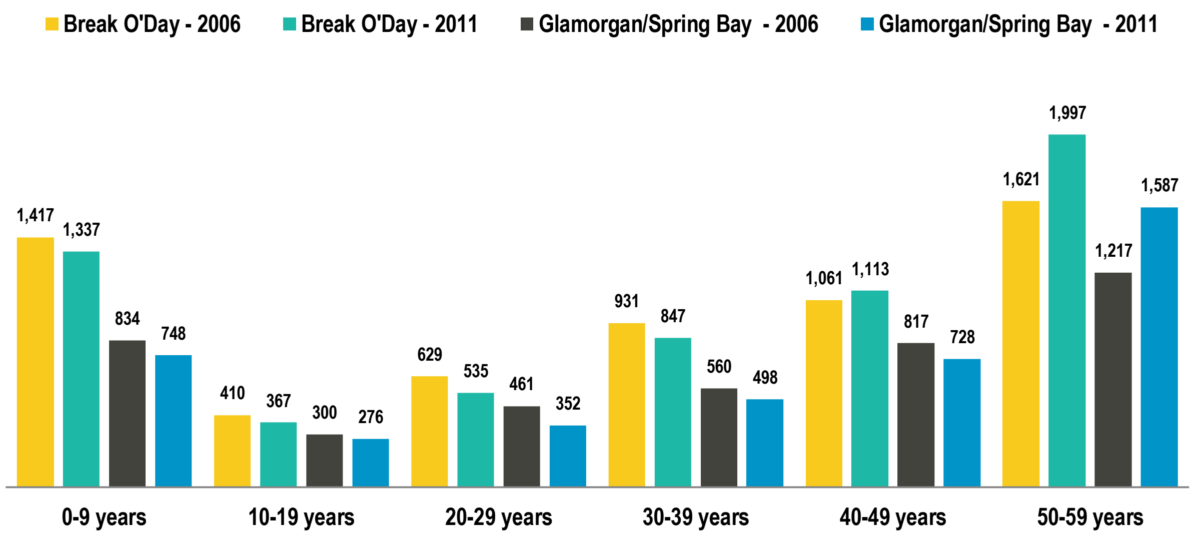


The population decline in 2012 is attributed to closure of some businesses and a trend toward a more transient population as people move out of the region looking for employment.

3.7. AGE STRUCTURE OF THE EAST COAST POPULATION

The 2006 and 2011 Census data indicates that the East Coast region (Break O'Day LGA and Glamorgan Spring Bay LGA) have a growing ageing population. The diagram on the following page indicates the age structure of the two LGAs over 2006 and 2011. As noted above, this ageing population base needs to be countered by greater numbers of families coming to the region for work.

FIGURE 6: AGE STRUCTURE OF EAST COAST REGION[31]



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[30] 2011 Census of Population and Housing, Australian Bureau of Statistics

[31] 2011 Census of Population and Housing, Australian Bureau of Statistics

Points to note include:

- Glamorgan Spring Bay had the largest proportional increase in the number of residents aged over 60, growing by 30% or 370 residents. Break O'Day also experienced an increase, with the number of residents aged 60 + growing by 23% or 376 residents;
- The number of residents aged 19 and under declined in both Glamorgan Spring Bay and Break O'Day, declining by 10% (86 residents) and 6% (80 residents) respectively; and
- Both LGAs also experienced a decline in the number of residents aged between 20 and 49, declining by 15% (or 195 residents) for Glamorgan Spring Bay and by 11% (or 221 residents) for Break O'Day. This decline in this critically important age range is important for business viability and is resulting in the closure of a variety of businesses.

The population and ageing trends reflect an ageing population. Whilst The Group does not discount the key benefits which can be derived from a resident population with a mix of elderly individuals, such as increased community spirit and participation particularly in volunteer programs, an aging population generally is acknowledged to put greater pressure on public resources (primarily health related services and resources).

Additional feedback from a number of sources also indicates that the two LGAs' more recent population growth are characterised by "tree changers" who represent a mix of those looking for lifestyle change as well as retirees and semi retirees. These new residents often tend to be passive-lifestyle investors and are usually more risk averse because of their stage of life. As a result, they generally are not looking to establish larger businesses which will generate greater employment for locals but instead, they will look to establish smaller scale accommodation establishments (B&B style) and similar small business ventures etc. which they can run themselves.

3.8. EMPLOYMENT STATUS

The following figure illustrates the changes in employment status in the two LGAs in 2006 and 2011.

FIGURE 7: EMPLOYMENT STATUS OF THE EAST COAST REGION[32]

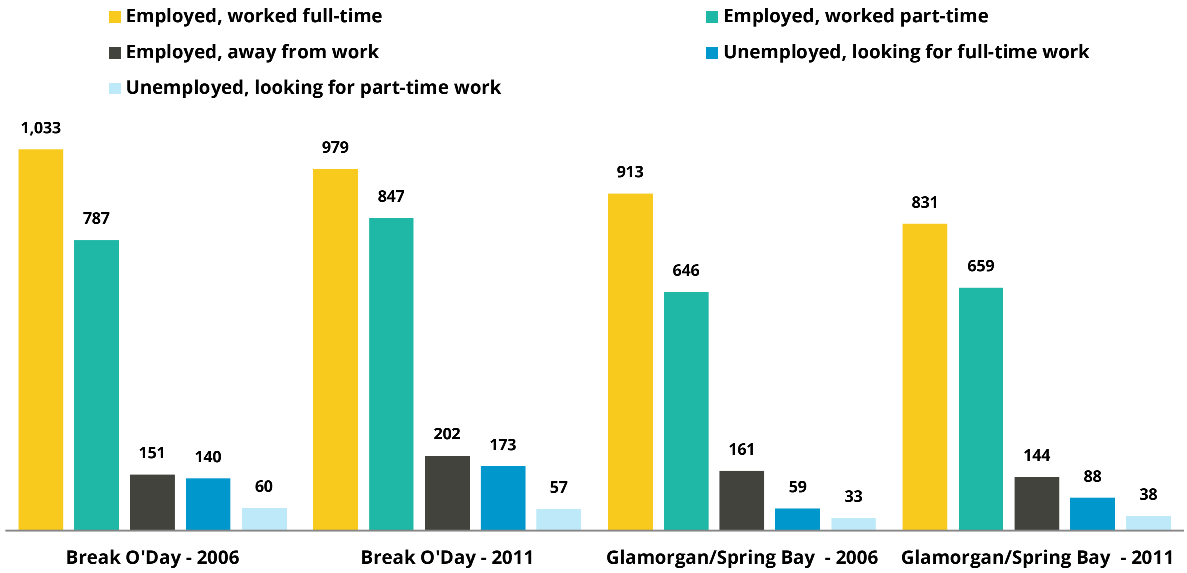


Figure 7 above highlights that:

- Over the 2006 and 2011 period, there was a decline in the number of Break O'Day and Glamorgan Spring Bay residents in full time employment, declining by 5% (or 54 residents) and 9% (or 82 residents) respectively;
- There was growth in the number of residents employed part-time, growing by 8% (or 60 residents) in Break O'Day and by 2% (13 residents) in Glamorgan Spring Bay;
- The number of residents unemployed (and looking for full-time work) grew in both LGAs, increasing by 24% (33 residents) in Break O'Day and by 49% (29 residents) in Glamorgan Spring Bay; and
- In Break O'Day, the number of residents looking for part-time work declined by 5% (3 residents) whilst the number of those in Glamorgan Spring Bay looking for part-time work increased by 15% (5 residents).

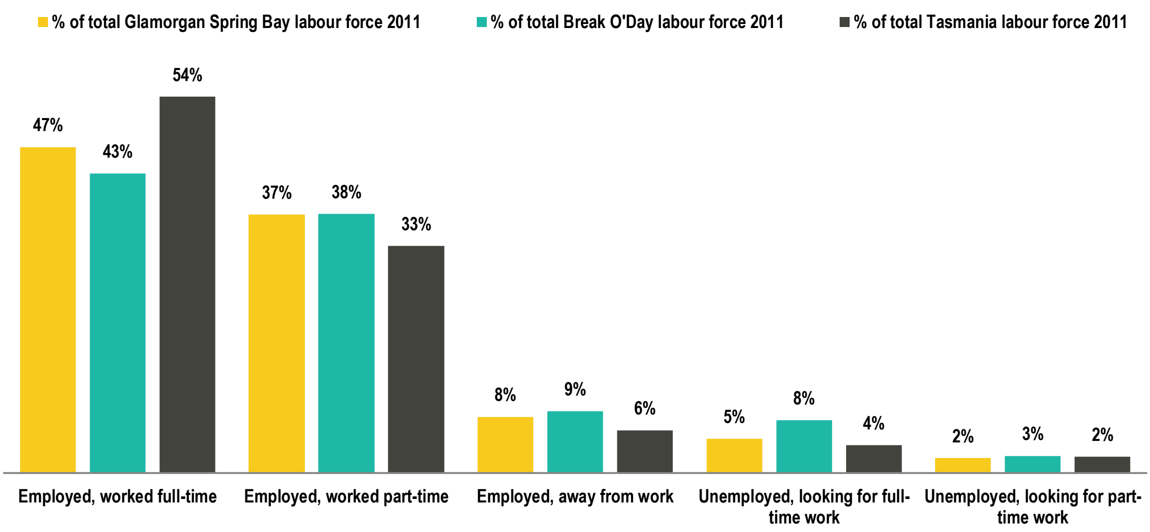
[32] 2011 Census of Population and Housing, Australian Bureau of Statistics

The figure below provides an illustration of the employment status in the two regions as a proportion of the total available labour force in the region compared with Tasmania.

The findings indicate that:

- During 2011, 43% and 47% of Break O'Day's and Glamorgan Spring Bay's available labour force respectively were employed in full time employment. This is lower than the state average of 54%;
- Both Glamorgan Spring Bay (37%) and Break O'Day (38%) had a higher percentage of their available labour force indicating they were employed part time compared with the state average (33%); and
- A larger proportion of the labour force in both LGAs indicated they were unemployed and looking for either full time or part time employment (11% for Break O'Day and 7% for Glamorgan Spring Bay) than the state figure (6%).

FIGURE 8: EMPLOYMENT STATUS AS PROPORTION OF TOTAL AVAILABLE LABOUR FORCE – 2011[33]



We consider that the data highlights the employment challenges of the region. The importance of tourism employment opportunities to improve employment rates overall need to be focused on in the absence of other industry sectors. Whilst sectors of the agricultural economy do offer opportunities (such as viticulture), much of the employment is highly seasonal and often lower skilled and can involve contract labour being brought into the region for harvesting periods etc. By comparison, tourism based employment opportunities are more likely to lead to jobs for locals (providing the skill base exists).

[33] 2011 Census of Population and Housing, Australian Bureau of Statistics

3.9. INCOME

The figure below illustrates the percentage breakdown of resident's in the two LGAs annual income in the 2011 financial year compared with the total for Tasmania. This indicates that the two LGAs have a greater percentage of residents earning higher annual incomes ($52k - $78k) than the Tasmanian total.

FIGURE 9: INCOME COMPARISON[34]

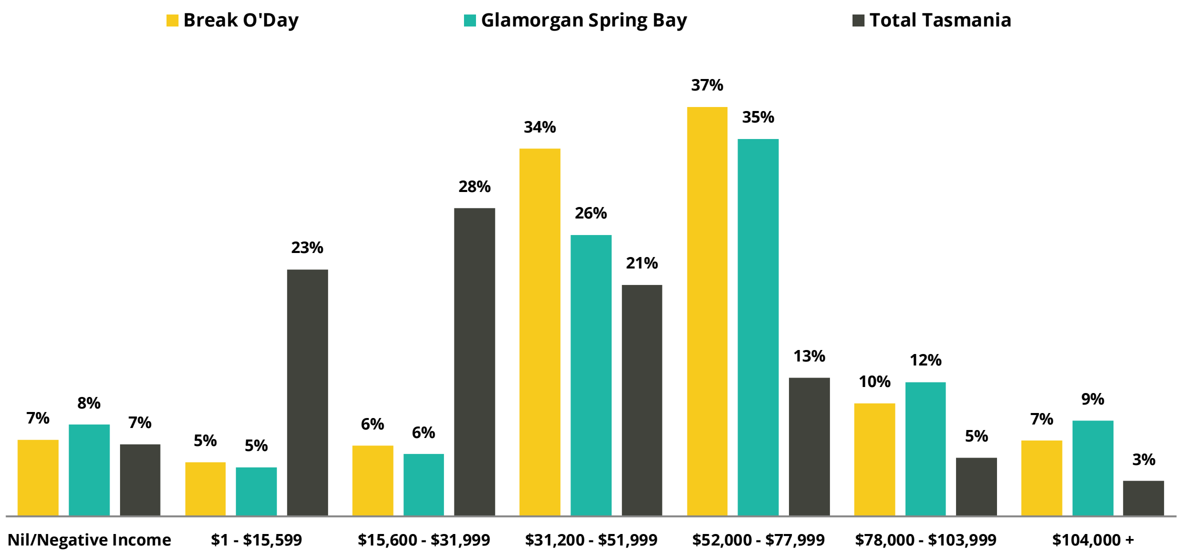


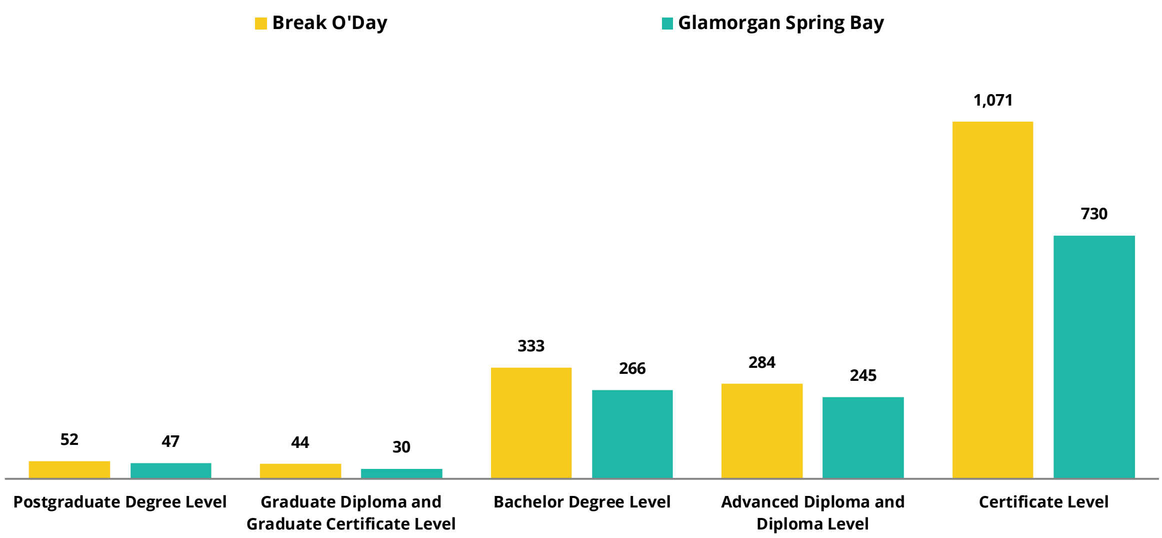
Figure 9 above highlights that income levels area higher for the region than the average for Tasmania overall. We consider that this is boosted by the larger number of life stylers who reside in the region and especially with an ageing population base.

3.10. HIGHER EDUCATION

Figure 10 provides an overview of the number of residents in the Break O'Day and Glamorgan Spring Bay LGAs with higher education qualifications from the 2011 Census. The need to encourage more people to reside in the region with higher education levels is noted by both Councils. This is seen as important in also encourage more business ventures and in creating a consumer base to support higher quality product and services.

[34] 2011 Census of Population and Housing, Australian Bureau of Statistics

FIGURE 10: NUMBER OF RESIDENTS WITH HIGHER EDUCATION QUALIFICATIONS[35]



Points to note include:

- Break O'Day has a total resident population of just over 6k. Of these residents, just under 29% have higher education qualifications, with the majority of these (60%) being of certificate level, followed by bachelor degree level (19%);
- Within the Break O'Day LGA, St Helens has the highest number of individuals with postgraduate qualifications, comprising 23% of all those who have completed postgraduate level qualifications;
- St Helens also has the largest number of residents with bachelor level qualifications, comprising of 32% of all those who have completed bachelor level studies in the LGA. This was followed by Scamander comprising 13% of total bachelor level study completions in Break O'Day;
- Glamorgan Spring Bay has a total resident population of just over 4k. Over 31% of Glamorgan Spring Bay residents have higher education qualifications, primarily of certificate level (55%), followed by bachelor degree level (20%) and advanced diploma and diploma level (19%);
- Within the Glamorgan Spring Bay LGA, Bicheno has the highest number of individuals with postgraduate qualifications, comprising 34% of all those who have completed postgraduate level qualifications in Glamorgan Spring Bay. This was followed by Coles Bay at 24%;
- Bicheno also had the largest number of residents with bachelor level qualifications, comprising of 25% of all those who have completed bachelor level studies in the LGA. This was followed by Swansea comprising 14% of total bachelor level study completions.

[35] 2011 Census of Population and Housing, Australian Bureau of Statistics

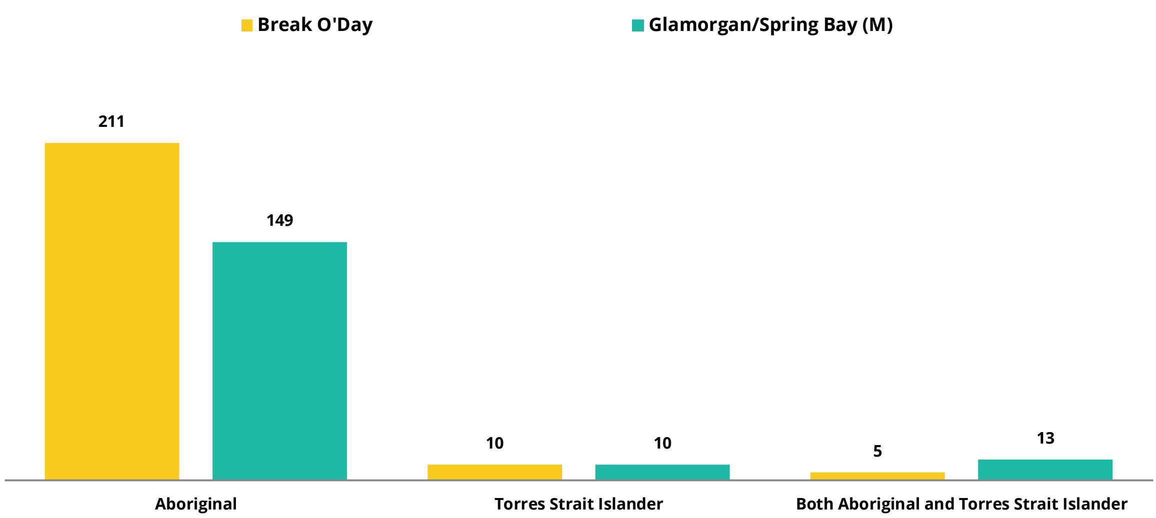
3.11. INDIGENOUS INDIVIDUALS

Out of the two East Coast LGAs, Break O'Day has the greatest number of indigenous residents (226 compared with 172 for Glamorgan Spring Bay). The figure below illustrates the breakdown of indigenous residents across the two LGAs. Indigenous residents represent 4% of total residents in the region.

Other points to note include:

- Within Break O'Day LGA, St Helens has the largest number of Indigenous residents, with 79 stating they were either Aboriginal or Torres Strait Islander (or both). This was followed by St Marys and Stieglitz with 32 residents; and
- Within the Glamorgan Spring Bay LGA, Triabunna had the greatest number of Indigenous residents, with 58 stating they were either Aboriginal or Torres Strait Islander (or both). This was followed by Bicheno with 32 residents.

FIGURE 11: INDIGENOUS RESIDENTS BREAKDOWN[36]



Opportunities could exist to work with local Indigenous communities to develop historical cultural product and whether Indigenous communities wish to actively get involved in cultural tourism product should be investigated.

[36] 2011 Census of Population and Housing, Australian Bureau of Statistics

3.12. TASMANIA'S TARGET AUDIENCE AND MARKET SEGMENTS

3.12.1. TARGET MARKET

The East Coast, being a recently formed tourism region, has not had in depth analysis performed on target audiences or key market segments yet. In discussions with Tourism Tasmania, it is assumed that the target audience from inter- state markets and relevant market segments would not differ dramatically from those identified for Tasmania in general.

Tourism Tasmania has defined the primary target audience as being Life Long Learners.

FIGURE 12: TASMANIA'S TARGET MARKETS

LIFE LONG LEARNERS	
Primary target market	Older couples, 40+, seeking a longer stay, touring-based experience
Secondary target market	Younger couples, 25-39, shorter stay, skew towards cultural interests

Characteristics of both Life Long Learners (both Primary and Secondary) include the following:

- They are eastern-seaboard living, tertiary educated, professionals/managers who regularly travel, and are socially and environmentally aware and health conscious;
- When they go on holidays, they prefer less crowded, more interesting places. They will try new things and pay for quality; and
- Being more intrinsically motivated, they have a propensity to keep learning and have a positive outlook on life.

With respect to the East Coast, industry feedback indicates more shorter stay visitors across the age range including a strong day visitor market ex Hobart (inter and intra state visitors).

3.12.2. MOTIVATIONS RESEARCH

In 2011, Tourism Tasmania undertook analysis into appeal triggers and motivations for tourism in Tasmania.[37] This research was used to identify the particular holiday experiences and appeals that Tasmania offers which best meet the motivations derived from Tasmania's target markets.

[37] Motivations Research, March 2011, Tourism Tasmania

Findings from the research with specific relevance to the East Coast include:

- Awareness regarding the level of current knowledge of Tasmanian holiday experiences was low;
- The appeal of Tasmanian holiday experiences was generally very high;
- When experiences were ranked in order of most appealing, the following consistently were ranked highest across each respondent segment: Coastal Nature, Heritage and Wilderness;
- Experiences linked to Wilderness, Heritage and Wildlife Encounters were considered as being unique to Tasmania;
- Increasing the awareness of possible Tasmanian travel experiences could potentially increase intention to visit by 34%;
- Growing the awareness of Tasmania's Wilderness and Heritage experiences has the highest potential to increase intention to take a holiday in Tasmania;
- When asked on the preferred duration of visit, the majority (76%) indicated they would prefer to tour the state (1 – 3 weeks); and
- The largest proportion of consumers indicated that they would most likely visit during summer (44%), followed by spring (32%), autumn (24%) and then winter (8%).

The above points have significant bearing on the marketability of the East Coast for the short to medium term. Based on the key findings from the research noted above The Group notes the following as implications for the East Coast specifically:

- Other than for the Bay of Fires, Freycinet Peninsula, Wine Glass Bay and Saffire Lodge Resort, the other areas and product on the East Coast would definitely have a more limited profile in interstate markets in particular. With respect to the intrastate market the East Coast is more likely to be perceived as a local holiday destination rather than a tourism region per se and with less product and more free experiences on offer;
- As the appeal of Tasmania holiday experiences are thought to correlate to National Park walks, stunning natural environments and scenery and heritage based product the East Coast comfortably fits within the general appeal of Tasmanian holiday experiences though these are not points of uniqueness as other regions have the same;
- The potential for the East Coast is heavily focused on the coast and the potential for water based activities and coastal walkways so "coastal nature" would fit very comfortably as one of the most appealing segments identified;

- The East Coast is likely to struggle when unique experiences are linked to wilderness (which has a strong West Coast focus) and heritage (which relates more strongly to other regions where towns in particular have a far greater percentage of older style heritage stone buildings). Though the quantum of unique bird life of the East Coast provides an opportunity to focus on wildlife encounters along with penguins and other experiences, the challenge is that many parts of Tasmania are able to offer quality wildlife encounters so it is hard for the East Coast to develop a strong niche other than potentially for bird watching and fishing;
- The opportunity to develop specific flora tours focussed on wild orchids which are found in many locations in the region but which need guided tours and information packages for special interest tour groups before they could be developed and marketed;
- We suspect that the ability to increase the intention of visitors to actually visit is going to be more strongly correlated to the packaging of existing product and the introduction of new product rather than merely increasing awareness (initially we would be concerned that the region risks over promising and under delivering unless additional product experiences can be generated and existing product can be renewed/refreshed and cleverly packaged);
- While the vast majority prefer to tour the State (1 - 3 weeks) the East Coast would need to develop more product and enhance existing facilities and infrastructure to competitively generate increased length of stay when one compares what other regions currently have to offer; and
- Anecdotal feedback indicates that the current climate on the East Coast is probably drier than many other locations in Tasmania and has temperatures much of the year which are likely to be seen as comfortable for interstate markets. The potential therefore exists for the East Coast to pick up on more spring, autumn and even winter visitors because of its perceived warmer and drier climatic conditions so climatic strengths should be built into promotional campaigns.

3.13. NEW PRODUCTS, SERVICES AND INFRASTRUCTURE REQUIRED

The Group has identified a number of new product and services as well as related infrastructure in order to expand and improve the product mix and overall profitability of the sector. Though we note that the industry is characterised by a larger number of lifestyle operators, there is a strong desire by all operators to increase the visitor season and grow the shoulder periods so the impact of seasonality can be reduced. The current visitor season which equates for many to approximately 3-5 months is too short to generate sufficient revenue to allow for up skilling/retraining, reinvestment into plant and equipment and for more extensive marketing activity. Every effort needs to be focused on growing the season to a 5-7 month period.

The challenge however is that reinvestment needs to occur before improve length of stay is likely to be able to be generated for many operators. We appreciate that this is going to be seen by a number as leap of faith and where returns and occupancy levels make this challenging.

3.14. COMMUNITY DESIRES AND CONCERNS

Feedback from operators (commercial and life stylers) as well as councils and from food and beverage retailers has provided a good indication of community desires and concerns. There are a number of perceptions on what tourism can deliver and The Group feels that for some there is an unrealistic expectation on how much business can be generated in a limited operating season based on the current product on offer.

The general feeling gathered through community consultation and observations reflects the following general desires

- A desire to retain the low impact slower pace of the region which makes it an attractive place for people to live and operate from so a short tourism season actually suits many life stylers;
- A desire for far more fulltime employment opportunities as we note that a number of people undertake more than one job in order to generate sufficient household income so business viability all year round is a significant issue;
- A strong desire to protect and preserve the environment;
- A strong desire to ensure that public accessibility to areas is not blocked and ideally is free including camping etc.;
- A desire amongst some to limit any further development and for further development to be only of a small scale and with minimal environmental and social impact which at times is perceived as an anti-development focus;
- A desire for improved and cheaper retail options, food and beverage options and overall services and amenities, though the ability to achieve this with small populations and limited and highly seasonal tourism businesses is challenging; and
- A desire for a higher standard of living but only if this does not compromise many of the values and principals which the regions community hold.

With respect to community concerns some of those are noted in the perceptions above but others include the following:

- Concern by lifestyle operators that if business dramatically improves they will struggle to achieve the work/life balance they currently have;
- A concern that the look and feel of the region may significantly change;
- A concern that the pace of life will dramatically increase (more like a city experience) which will diminish the value of living on the East Coast; and
- A concern that a number of social problems (poverty, petty crime and social based issues) may not be adequately addressed.

When asked whether they would prefer stronger local employment opportunities for the local community and associated economic benefits which may need to be correlated with medium scale development projects for tourism or retaining the smaller scale and lifestyle based values held at the moment the vast majority of stakeholders have commented on the strong need to improve overall economic benefits to the region. This would include expanding the shoulder periods so that the impact of seasonality is greatly reduced and better profitability is achieved even if this means working longer hours than currently.

Examples were provided to The Group of smaller scale infrastructure projects being pursued by council as well as development projects by the private sector which has effectively been blocked by community concern over a significant period of time (5-10 years). Discussions with some members of the investment and development community highlights the challenge of effectively getting projects up and running not only on the East Coast but other parts of Tasmania and the need for a paradigm shift before investment will actually flow.

If sustainable tourism development is to be actively encouraged, and seasonality issues adequately addressed, a more positive attitude toward tourism investment may need to be generated across the broader community. The proviso is that this needs to correlate to more jobs for approximately trained locals.

A community awareness campaign on the importance and value of the tourism sector to the East Coast would help improve understanding and may alleviate some of the current community concerns which exist.

4. DEMAND AND SUPPLY ANALYSIS

4.1. HISTORIC VISITATION TO THE REGION

4.1.1. CLASSIFICATION OF VISITORS

When assessing visitation to the East Coast region, The Group has obtained figures through the following sources:

- For total visitation to the East Coast (domestic day, domestic overnight and international), Tourism Research Australia data was utilised;
- A special data request was submitted to Tourism Tasmania for East Coast intrastate visitation data; and
- For detailed data on interstate and international visitation, Tourism Tasmania's TVS (Tasmanian Visitors Survey) was used which assesses visitation to the region by air and sea visitors.

Within the TVS, Tourism Tasmania have three different classifications for assessing visitation to a town/region; those being visitors who passed through, visitors who stopped and looked around but did not stay overnight and visitors who stayed overnight.

It is important to note that the category "visitors who passed through" are visitors who have not actually stopped in a town but simply drove through the town. These visitors therefore input no economic contribution to the town but need to be classified as the potential market (and are currently classified as leakage). They represent a market which could be encouraged to stop with the right product/attractions etc. Over the past 10 years, this visitor category has represented on average 5% (approximately 4k visitors) of the total interstate and international visitor market to the East Coast region per annum.

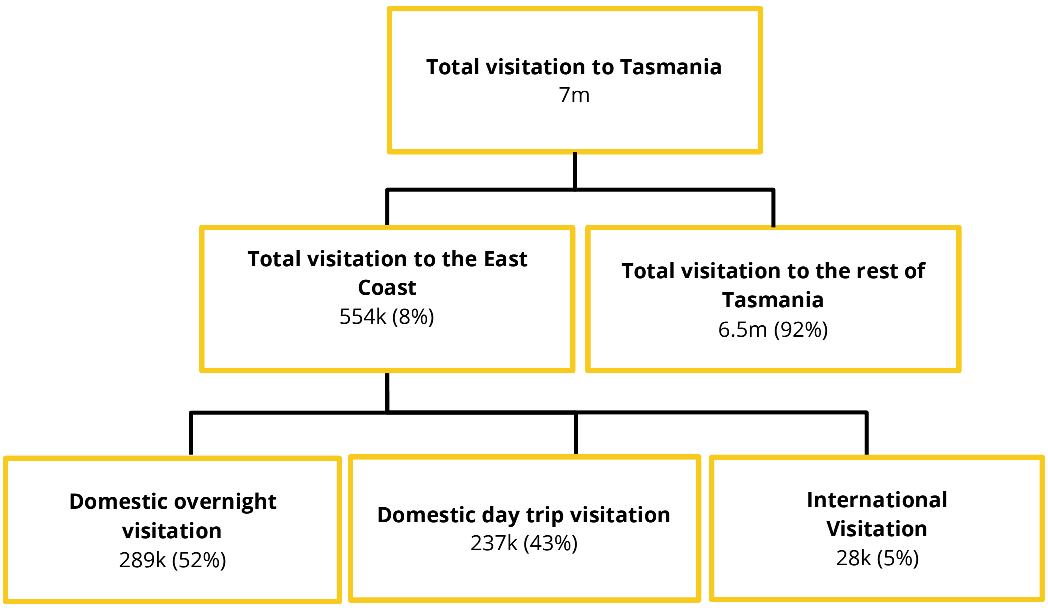
For the time being, we have included this category of potential visitors when defining total visitation to the region by air and sea visitors (also known as interstate and international visitors). We have also provided a separate breakdown to show the level of visitation to the region by the three different visitor categories (Section 4.1.4).

4.1.2. TOTAL VISITATION TO THE EAST COAST

The following wire diagram illustrates estimated total visitation to the East Coast region in the 2011/12 FY (based on TRA data) by the following visitor types: domestic overnight visitors, domestic day trip visitors and international visitors.

Over this period, domestic overnight visitation (intrastate and interstate) comprised the largest visitor market, with over 52% (289k) of visitors to the East Coast being domestic overnight visitors. This was followed by domestic day trip visitation (intrastate and interstate but significantly more intra- state) at 43% (237k visitors) and international visitation which comprised 5% (28k) of total visitation to the region.

FIGURE 13: TOTAL VISITATION TO THE EAST COAST FOR 2011/12[38]

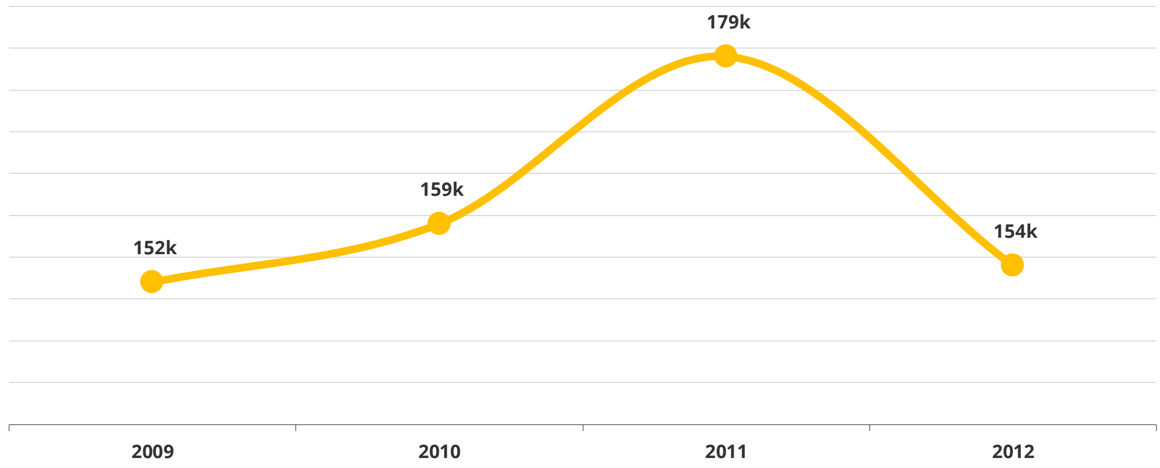


4.1.3. INTRASTATE VISITATION

Figure 14 on the following page provides intrastate visitation for overnight trips only undertaken in the East Coast from 2009 – 2012. Over this period intrastate visitation grew by 1% (2k), increasing from 152k visitors to 154k visitors.

[38] Based on data from 2011/12 FY provided by Tourism Research Australia – Regional Tourism Profile for East Coast.

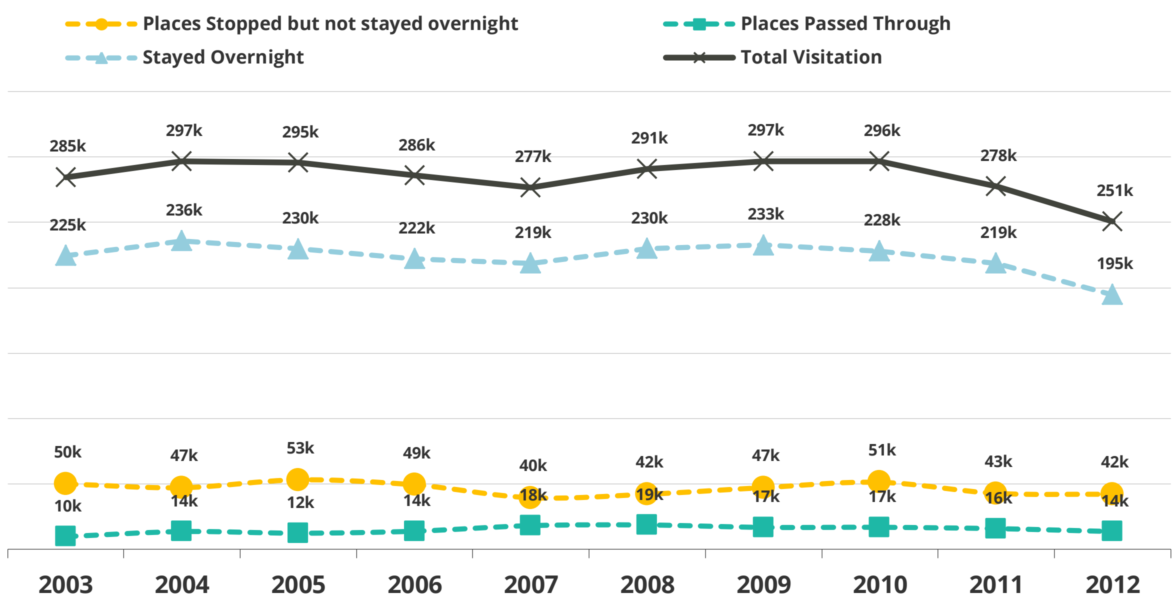
FIGURE 14: INTRASTATE OVERNIGHT VISITATION[39]



4.1.4. TOTAL HISTORIC VISITATION TO THE REGION BY INTERSTATE AND INTERNATIONAL VISITORS[40]

Over the past 10 years, total visitation by those who arrive by air and sea (interstate and international visitors) to the East Coast region has declined by 12% (34k), falling from roughly 285k to just under 251k. Figure 15 illustrates this decline.

FIGURE 15: VISITATION TO THE EAST COAST REGION BY INTERSTATE AND INTERNATIONAL VISITORS [41]



[39] Data is September Year End - NVS Overnight Trips – Data provided by Tourism Tasmania
[40] It is important to note that Tourism Tasmania's Visitor Survey breakdown for the East Coast does not include intrastate visitation. It comprises only those who arrived by air and sea (interstate and international visitors) into Tasmania.
[41] Data is September Year End. East Coast Tourism Profile Summary, Tourism Tasmania

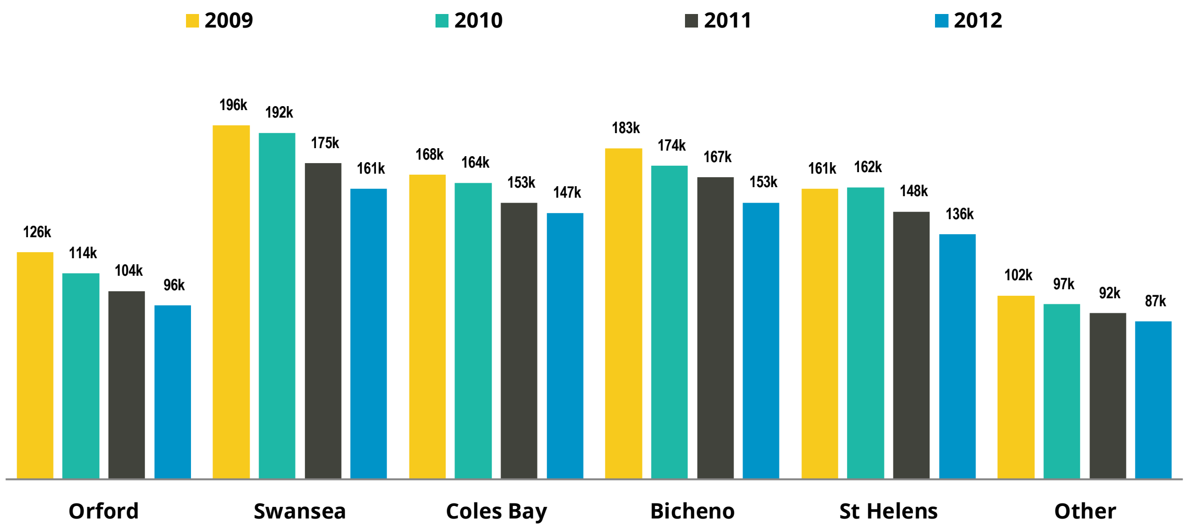
Other points to note include:

- Overnight visitation has declined by roughly 30k (13%), falling from 225k to 195k over the 10 year period;
- Over the same period, day visitation (places stopped but not stayed overnight) fell by 16%, a total decline of just over 8k visitors; and
- Pass through visitors (that is, those who do not stop) grew by just over 4k visitors (39%).

4.1.5. VISITATION TO EAST COAST TOWNS BY INTERSTATE AND INTERNATIONAL VISITORS

Figure 16 illustrates visitation by interstate and international visitors to the individual towns in the East Coast region.[42] Out of the 5 towns, Swansea received the greatest number of visitors, with visitors undertaking 161k trips in 2012. Orford[43] on the other hand received the least number of visitors over the period, with 96k trips being taken in 2012.

FIGURE 16: ALL TRIPS TO EAST COAST REGION (INC. REPEATS AND MULTIPLE PLACE VISITS) - INTERSTATE AND INTERNATIONAL VISITORS [44]



[42] Note that these figures include multiple trip visits and have been obtained by the Tasmanian Visitor Survey. For example, respondents are asked "Did you visit or stay overnight at any of the following places?" Respondents are able to tick multiple towns. This figure Includes visitors who "passed through", visitors who "stopped but did not stay overnight" and visitors who "stayed overnight".

[43] It is important to note that though Orford is captured in the survey data Triabunna is not an option for surveyees to fill out.

[44] Data is September Year End. East Coast Tourism Profile Summary, Tourism Tasmania

Other points to note include:

- Travel to Orford over the 4 year period has declined the greatest, falling by 23% (29k trips). This is followed by trips to Swansea which fell by 18% (35k trips);
- Coles Bay experienced the smallest decline in visitation, falling by 13% (21k trips);
- All visits to the region fell from 935k trips in 2009 to 780k trips in 2012, a total decline of 17% (155k trips); and
- The reason Triabunna is not included is because it is not yet included in the Tourism Tasmania survey material.

4.2. FORECASTED VISITATION

When assessing visitation to the East Coast region, a number of data sources have had to be utilised in order to ascertain a complete picture of visitation to the region due to various data gaps. By way of example, whilst the Tasmanian Visitors Survey undertaken by Tourism Tasmania includes detailed visitation data to the East Coast based on those who arrive by air and sea, it does not breakdown this data based on international visitors or interstate visitors, nor does it provide intrastate data for the East Coast.

As a result, The Group utilised Tourism Research Data to provide a top line assessment of visitation to the region based on total domestic overnight visitation, domestic day visitation and international visitation. The Group also submitted a special data request in order to obtain estimated intrastate visitation to the East Coast, however this was only able to be provided for overnight intrastate visitation rather than day intrastate visitation to the region.

In order to create visitor forecasts, The Group assessed historic visitor trends by each visitor type. For the East Coast, The Group was only able to obtain this historic data from Tourism Tasmania for intrastate visitation (4 year historic data) and for combined interstate and international visitation (10 year historic data.

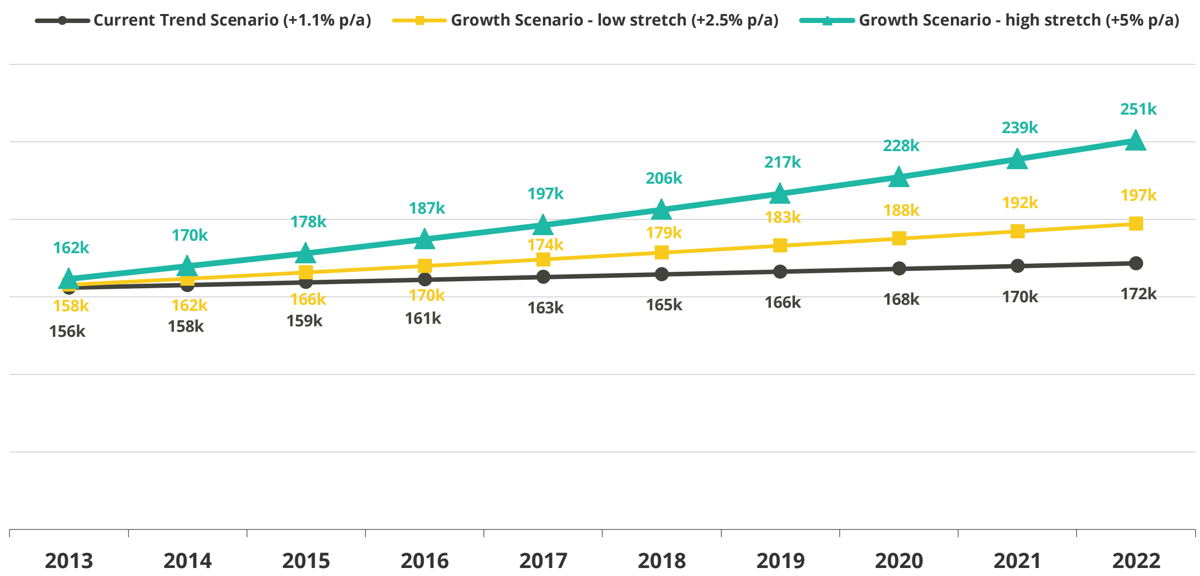
The visitor forecasts therefore have been provided separately for intrastate overnight visitors and the combined visitation by interstate and international visitors.

4.2.1. FORECASTED VISITATION - INTRASTATE OVERNIGHT VISITORS

Figure 17 provides an overview of forecasted intrastate overnight visitation to the East Coast region based on average historic growth from 2009 – 2012 of 1.2% per annum.[45]

Visitor growth stretch scenarios have also been provided of 2.5% per annum (low stretch) and 5% per annum (high stretch) which illustrate the potential for growing intrastate overnight visitation to the East Coast region based on the successful implementation of strategies and recommendations suggested in this DMP. They should be considered as a guide only and are provided to allow the RTO and its stakeholders to set a target and monitor visitation performance.

FIGURE 17: 10 YEAR FORECASTED VISITATION TO THE EAST COAST BY INTRASTATE OVERNIGHT VISITORS[46]



Based on the current trend scenario (2009 – 2012), visitation by intrastate visitors is anticipated to grow by just under 16k visitors (a growth of 10%) over 2013 – 2012 or 1.1% per annum.

The growth scenarios provided illustrate the impact on visitation numbers if visitation were to increase as a result of the successful implementation of this DMP. Applying a growth rate of 2.5% per annum or 5% per annum, visitation by intrastate visitors could potentially grow by 25% (39k visitors) or 55% (89k) over the 10 year period.

45 The Group has provided a separate breakdown for intrastate overnight visitation to the East Coast because currently, the Tasmania Visitor Survey only includes data for the East Coast region on those who arrived by air or sea (interstate and international visitation). The Group submitted a special data request to Tourism Tasmania in order to obtain estimated intrastate visitation to the East Coast.

46 Forecasts for current trend scenario based on historical growth of 1.2% per annum from 2009 – 2012 obtained from figures provided by Tourism Tasmania (special data request)

Whilst some may see these forecasts as too low for a 10 year period, it must be noted that firstly there is a need to address the current historic decline in visitation. Hence the region needs to go from a small declining trend to a positive growth trend which may take a little time to turn around.

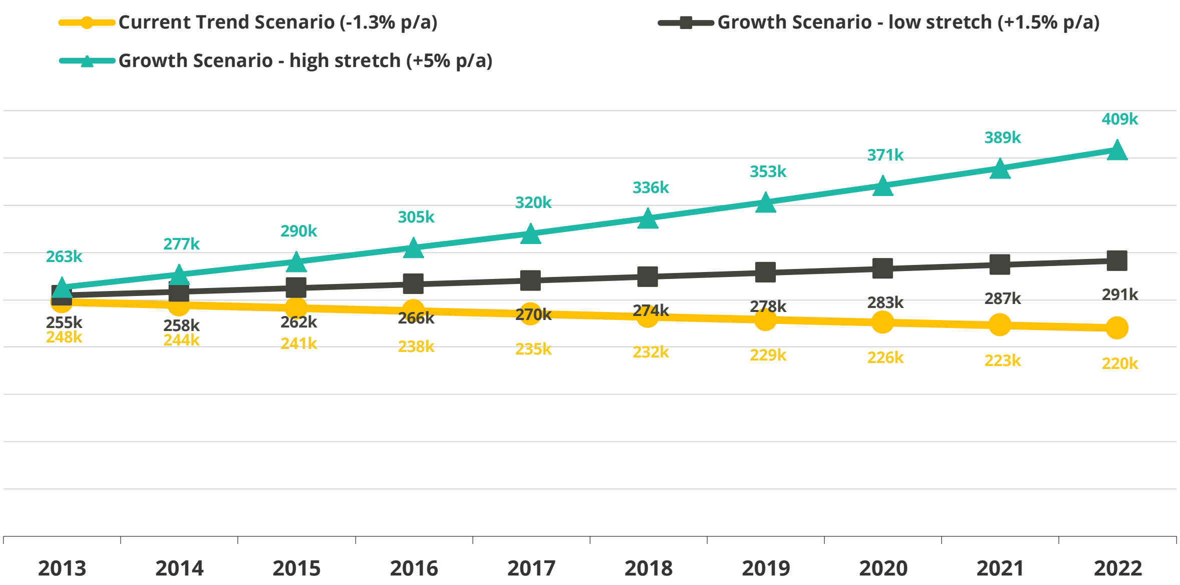
4.2.2. FORECASTED VISITATION - INTERSTATE AND INTERNATIONAL VISITORS

Figure 18 provides an overview of forecasted visitation to the East Coast region by interstate and international visitors based on historic growth from 2003 – 2013 of -1.3% per annum. Based on the current trend scenario, visitation by interstate and international visitors could be anticipated to decline by 11% (28k visitors) over the 10 year period, falling from just under 248k in 2013 to 220k by 2022.

Tourism is acknowledged as a highly important economic sector for the East Coast region and therefore action needs to be taken in order to arrest this trend and mitigate the impact it could have on the local economy and residents.

Two stretch growth scenarios have also been provided of 1.5% per annum (low stretch) and 5% per annum (high stretch) which illustrate that with the successful implementation of the recommendations suggested in this strategy, visitation to the region by interstate and international visitors could potentially grow by 37k (low stretch) through to 145k (high stretch) from 2013 – 2022. The RTO needs to monitor visitor trends and determine what growth pattern is more realistic.

FIGURE 18: 10 YEAR FORECASTED VISITATION TO THE EAST COST BY INTERSTATE AND INTERNATIONAL VISITORS[47]



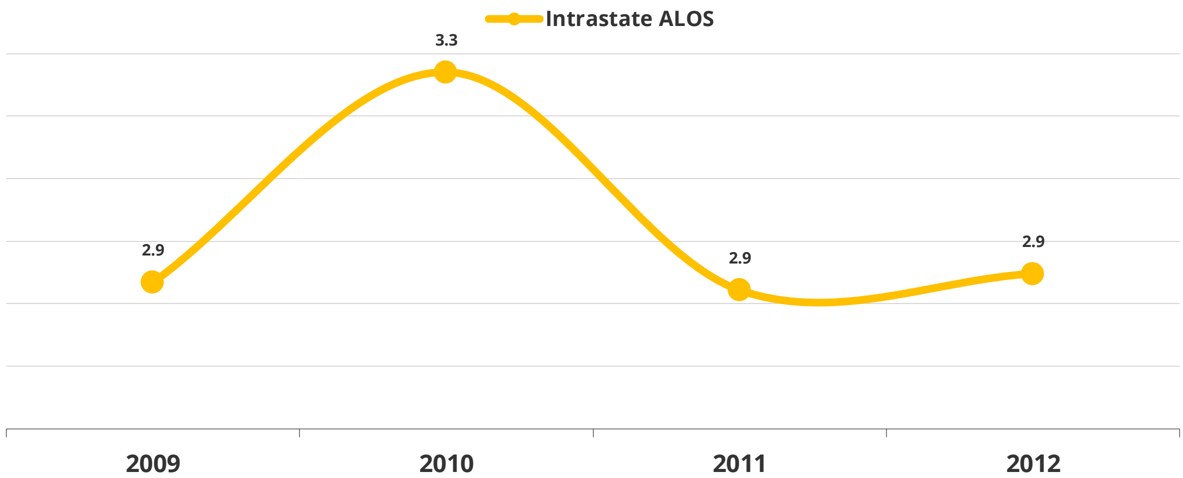
[47] Forecasts for current trend scenario based on historical growth of -1.3% per annum from 2003 – 2012 obtained from figures in East Coast Tourism Profile Summary, Tourism Tasmania.

4.3. EAST COAST AVERAGE LENGTH OF STAY

4.3.1. ALOS - INTRASTATE VISITORS

Growing the average length of stay (ALOS) is viewed as a priority for stakeholders spoken to within the East Coast region. From 2009 – 2012, the average length of stay for intrastate visitors to the East Coast region averaged 3 nights.

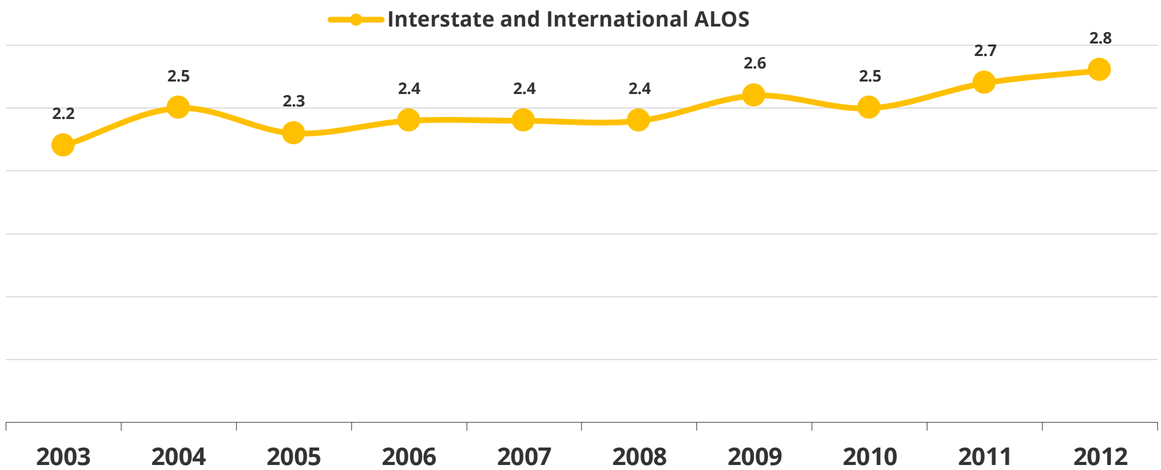
FIGURE 19: ALOS – EAST COAST – INTRASTATE VISITORS[48]



4.3.2. ALOS - INTERSTATE AND INTERNATIONAL VISITORS

Over the past 10 years, ALOS by interstate and international visitors has not changed significantly, only slightly increasing by 0.6 nights. The figure below illustrates the change in ALOS by interstate and international visitors over the past 10 years.

FIGURE 20: ALOS – EAST COAST - INTERSTATE AND INTERNATIONAL VISITORS[49]



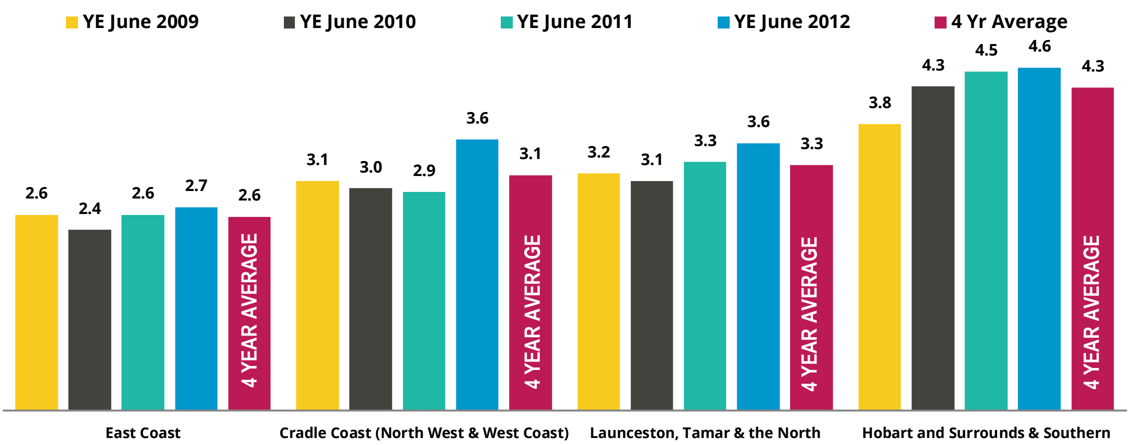
[48] Based on special data provided by Tourism Tasmania for September 2009 YE – September 2012 YE
[49] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

4.3.3. TASMANIAN REGIONS' ALOS COMPARISON - INTERSTATE AND INTERNATIONAL VISITORS

Out of the 4 regions in Tasmania (as defined by Tourism Tasmania), the East Coast has had the lowest average length of stay over the 4 year period assessed (2009 – 2012) at 2.6 nights, this was followed by the Cradle Coast (North West and West Coast) which averaged 3.1 nights. Hobart and Surrounds and Southern had the highest average length of stay over the same period at 4.3 nights, followed by Launceston, Tamar & the North at 3.3 nights. Figure 21 on the following page reflects this comparison.

To grow average length of stay, greater investment needs to be put into broadening the product mix (including events) as well as the greater promotion of existing experiences through packaging product etc.

FIGURE 21: ALOS - REGIONAL COMPARISON – INTERSTATE AND INTERNATIONAL VISITORS[50]



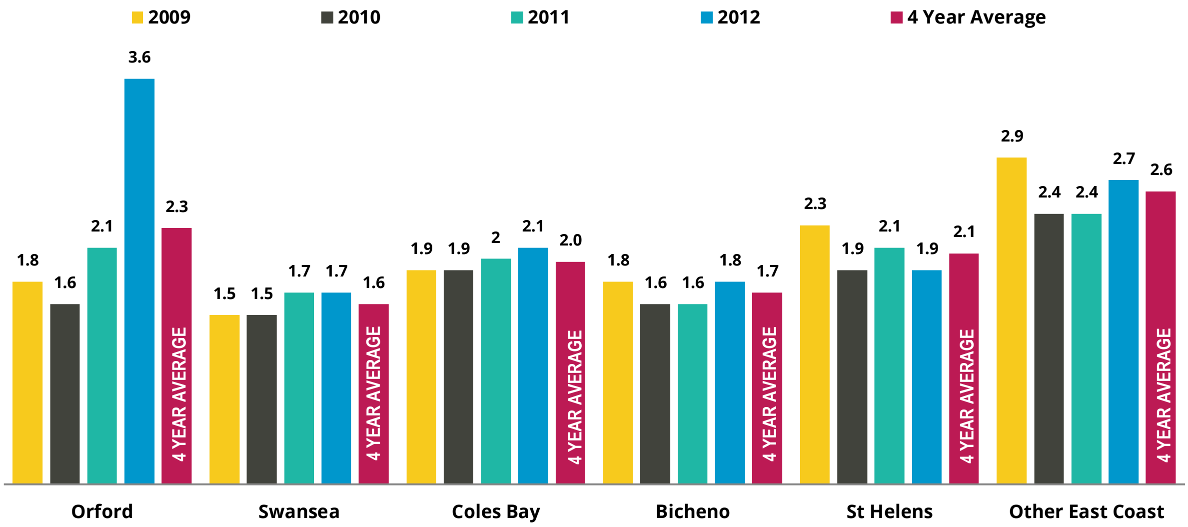
4.3.4. EAST COAST TOWNS' ALOS - INTERSTATE AND INTERNATIONAL VISITORS

The following figure provides an overview of the average length of stay within each of the primary towns in the East Coast region. Over the 4 year period (2009 – 2012), the greatest average length of stay (after Other East Coast) was Orford at 2.3 nights followed by St Helens at 2.1 nights. Swansea had the lowest average length of stay at 1.6 nights over the 4 year period.

It is important to note that in 2012, Orford experienced an abnormally high ALOS (3.6 nights) in comparison with its historic trend. The Group understands that this may have been due to the increased number of visitors staying in the region due to the NBN rollout and other Government programs. As Orford has very little accommodation stock, the Orford figures should be treated with care as they do not reflect the East Coast overall.

50 Average Number of Nights Spent in each Place, Tourism Tasmania, September 2009 YE – September 2012 YE

FIGURE 22: ALOS - EAST COAST TOWN COMPARISON – INTERSTATE AND INTERNATIONAL VISITORS[51]

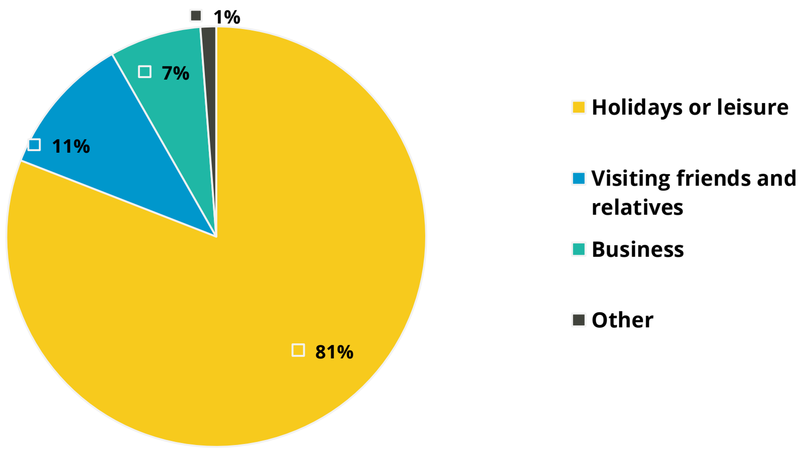


4.4. EAST COAST MOTIVATION FOR TRAVEL

4.4.1. INTRASTATE VISITORS

Figure 23FIGURE 23 below highlights the motivation of travel to the East Coast for intrastate visitors (4 year average from YE September 2009 – YE September 2012). Over this four year period, the primary reason for intrastate travel to the region was for holidays or leisure, with on average, over 81% (45k) of visitors per annum indicating they travelled for this reason. This was followed by the visiting friends and family market, which comprised 11% of visitors (6k) over the same period.

FIGURE 23: 4 YEAR AVERAGE - MOTIVATION OF TRAVEL– INTRASTATE VISITORS[52]



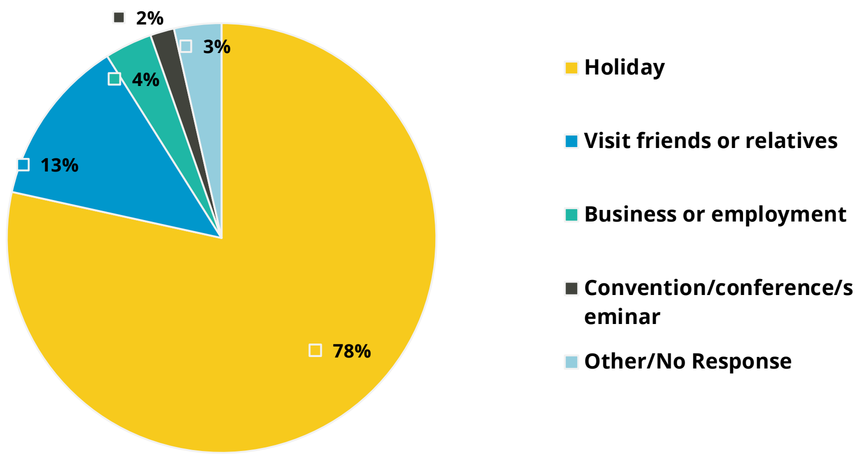
[51] Average Number of Nights Spent in each Place, Tourism Tasmania, September 2009 YE – September 2012 YE
[52] Based on special request data that was compiled by Tourism Tasmania based on TRA data. Data is Sept Year End.

4.4.2. INTERSTATE AND INTERNATIONAL VISITORS[53]

The following figure provides a breakdown of the primary reasons for travel to the East Coast for interstate and international visitors.

Over the 4 year period assessed (2009 – 2012), the primary reason for visitation was for a holiday, with on average, over 78% of visitors (207k) travelling to the region per annum for this reason. This was followed by those visiting family and friends, who comprised 13% (or 33k) of visitors annually. Travel for conferences/conventions/seminars was the smallest market, which on averaged comprised only 2% (or 5k) of visitors per annum.

FIGURE 24: 4 YEAR AVERAGE - MOTIVATION OF TRAVEL– INTERSTATE AND INTERNATIONAL VISITORS[54]



4.5. EAST COAST ESTIMATED VISITOR MARKETS

While the TVS and the special data request provided by Tourism Tasmania does provide a breakdown of visitor travel motivations, this only includes a breakdown for intrastate visitors and combined interstate and international visitors.

As the travel motivations for interstate and international visitors can vary greatly, The Group has completed an estimated market share table (based on the TRA data and the TVS) highlighting main purpose of travel to the region by visitor markets (interstate overnight/day visitors, intrastate

[53] The Group is unable to provide a separate breakdown of motivations for interstate visitors and international visitors as data is based on the Tasmanian Visitor Survey which places these visitors in the same group.
[54] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

overnight/day visitors and international overnight/day visitors)[55] which provides a base level of data for the RTO to build on. [56]

TABLE 4: EAST COAST VISITATION – MAIN PURPOSE OF VISIT[57]

2011/12 Estimated Market Share by main purpose of travel							
	Leisure o/night	Business o/night	Conference o/night	VFR/ Education/ Other O/night	Day Trippers Drive Thru	Totals	Market Share
Interstate	106,500	6,000	2,725	19,400	39,000	**173,625**	31%
Intrastate	116,000	9,000	2,000	27,000	198,000	**352,000**	64%
International	23,275	600	175	1,200	3,000	**28,250**	5%
Totals	**245,775**	**15,600**	**4,900**	**47,600**	**240,000**	**553,875**	100%
Market Share	**44%**	**2.8%**	**0.9%**	**9%**	**43%**	**100%**	**-**

4.6. EAST COAST ESTIMATED GUEST NIGHTS

The following table provides a snapshot of visitation to the East Coast as at 2012/13 based on an accommodation survey undertaken by The Group and total accommodation available in the region (as provided by Tourism Tasmania's TigerTOUR database).

TABLE 5: 2011/12 TOTAL ESTIMATED GUEST NIGHTS FOR THOSE STAYING IN COMMERCIAL ACCOMMODATION[58]

2011/12 Total Estimated Guests for those staying in commerical accommodation only (excludes those staying with friends/family)									
Type of Accommodation	# of operators	Rooms	Occupancy Rate	Room Availability Per Annum	Guest Per Room Ratio	Total Guest Nights	Average Stay per Guest	Total Estimated Guests	Share Of Guests
Small (5 or less rooms)	102	209	43%	76,285	1.85	60,685	2.5	24,097	17%
Medium (6 - 15 rooms)	24	212	40%	77,380	1.8	55,714	2.0	27,857	20%
Large (16 + rooms)	25	783	45%	285,795	1.6	205,772	2.3	88,188	63%
Total	**151**	**1,204**	**-**	**439,460**	**-**	**322,171**	**-**	**140,142**	**100%**

Table 5 above highlights that a total of 140,142 estimated guests stayed in commercial accommodation in the region in 2011/12. This figure excludes those staying with friends and relatives and especially the large number of visitors who rent shacks or who are shack owners coming for multiple trips per annum.

[55] The Group has developed these tables because whilst Tourism Tasmania's Visitor Survey does include a question on purpose of travel, this data is not broken down by visitor type (Domestic Overnight, Domestic Day or International).
[56] The Group has developed these tables because whilst Tourism Tasmania's Visitor Survey does include a question on purpose of travel, this data is not broken down by visitor type (Domestic Overnight, Domestic Day or International).
[57] Data collected from TVS (September YE) and TRA profile for East Coast region (December YE).
[58] Data collected via TigerTOUR database as well as accommodation survey (n=20) completed by The Group.

Those staying in commercial accommodation therefore represent 53% of total overnight visitors to the region.

This highlights the significance of the shackies market as an important source of accommodation and one which is currently unquantified, but which needs to be.

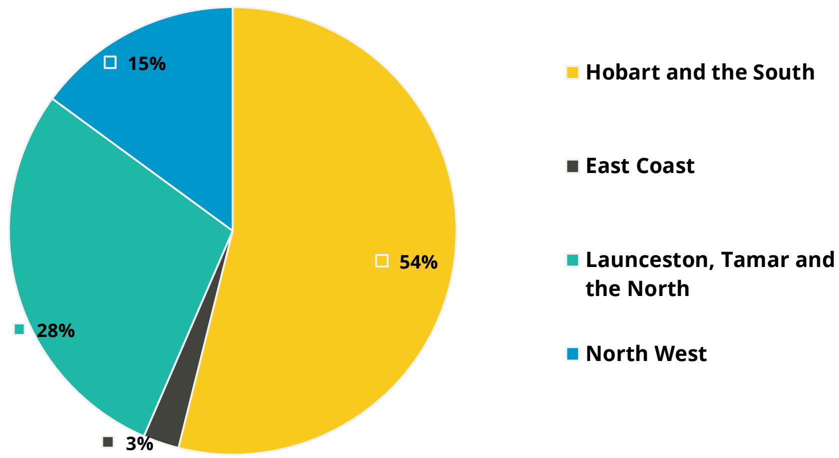
4.7. EAST COAST ORIGIN OF VISITORS

4.7.1. INTRASTATE OVERNIGHT VISITORS

The figure below illustrates the 4 year average (2009 – 2012) for intrastate visitors to the East Coast. A large majority of intrastate visitors to the region (54% or 86k) per annum originated from Hobart and the South, followed by Launceston, Tamar and the North (28% or 53k visitors per annum).

We consider that many of these intrastate overnight visitors are shackies with many owners residing in Hobart, Launceston and the North West.

FIGURE 25: 4 YEAR AVERAGE - PLACE OF ORIGIN - INTRASTATE VISITORS[59]



4.7.2. INTERSTATE VISITORS

Figure 26 on the following page provides an overview of the state of origin for domestic interstate visitors to the East Coast over the period 2009 – 2012. Over this period, the majority of interstate visitors to the East Coast originated from Victoria (36% or 74k visitors per annum) and from New South Wales (29% or 59k visitors per annum). The Northern Territory and the Australian Capital Territory generated the least amount of visitors at 1% (2k visitors) and 2.3% (5k visitors) respectively.

[59] Based on special request data that was compiled by Tourism Tasmania based on TRA data. Data is Sept Year End.

Statistics gathered from 232 survey forms given out at visitor information centres in the region over the Christmas – January 2012-13 holiday period indicate that 30% over this period are from Victoria and 20% from NSW and 20% from Queensland with other states similar to the TRA data results.

Anecdotal feedback indicates that visitation from Victoria has remained static over the last 10 year period whilst stronger growth has been experienced from the other states and territories. Future marketing strategies by the RTO need to pick up on those generating markets such as Brisbane and Sydney with stronger growth potential and especially if there are direct air services into Hobart and Launceston from these cities.

FIGURE 26: 4 YEAR AVERAGE - PLACE OF ORIGIN - INTERSTATE VISITORS [60]

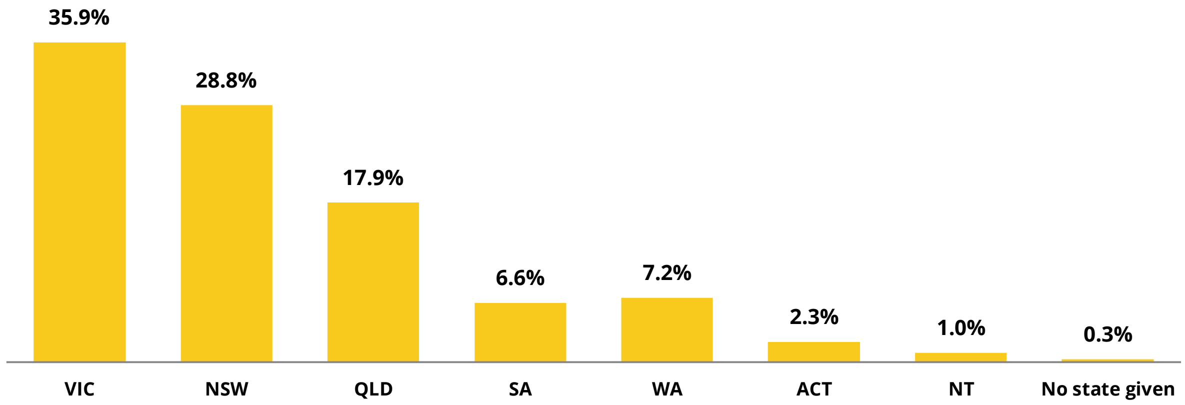


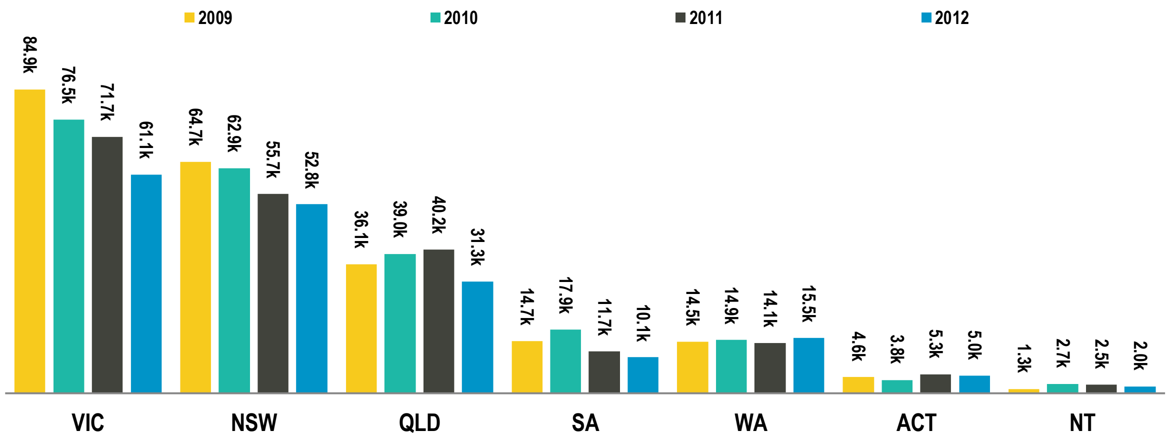
Figure 27 illustrates the growth/decline in visitor origin over the 4 year period assessed (2009 – 2012). Points to note include:

- Proportionately, visitation from Northern Territory increased the most, growing by 54% (or 700 visitors). This was followed by the ACT (9% growth or 400 visitors) and Western Australia (7% growth or 1k visitors);
- Visitation from South Australian residents declined the most, falling from 15k visitors in 2009 to 10k visitors in 2012, a total decline of over 31% (4.6k visitors);
- The most significant decline in terms of visitor numbers is evident in the Victorian visitor market, with a total decline of just under 24k visitors occurring from 2009 – 2012 (a total decline of 28%);
- Visitation from the NSW market has also fallen, declining from 65k visitors in 2009 to just under 53k visitors in 2012 (a total drop in visitation of 18%); and
- The QLD market has also declined, falling by 13% (4.8k visitors) over the 4 year period.

[60] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

The climatic conditions in many parts of Victoria are often similar to Tasmania so climate is not always seen as a positive attribute. For Sydney, Brisbane, Adelaide and Perth, the cooler East Coast climate is more likely to be viewed as a novelty and unique and could be more appealing. Furthermore, unlike for Victorians, the East Coast is not generally well known to interstate visitors so it is an "untapped" destination for them which may offer more marketing prospects and appeal.

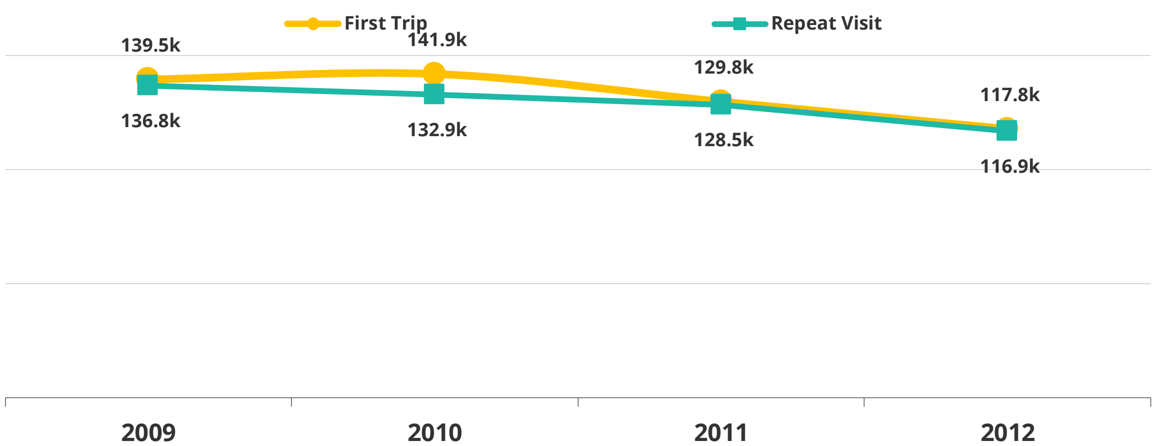
FIGURE 27: STATE OF ORIGIN - VISITORS TO EAST COAST – 4 YEAR GROWTH[61]



4.8. EAST COAST REPEAT VISITATION[62]

Figure 28 below provides a breakdown of repeat visitation to the East Coast by interstate and international visitors. Visitation is fairly evenly split between first time visitors and repeat visitors, with 51% of visitors being first time travellers to the East Coast and the remaining 49% having travelled to the region previously.

FIGURE 28: REPEAT VISITATION – EAST COAST INTERSTATE AND INTERNATIONAL VISITATION[63]



[61] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE
[62] The Group is unable to provide a separate breakdown of repeat visitation for interstate visitors and international visitors as data is based on the Tasmanian Visitor Survey which places these visitors in the same group.
[63] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

Repeat visitation is noted as very high which we consider reflects that the region is probably exceeding visitor expectations and hence a desire by visitors to repeat travel experiences. Repeat visitation is also likely to be correlated to VFR travellers and regular interstate business travellers.

4.9. EAST COAST ACCOMMODATION TYPE UTILISED

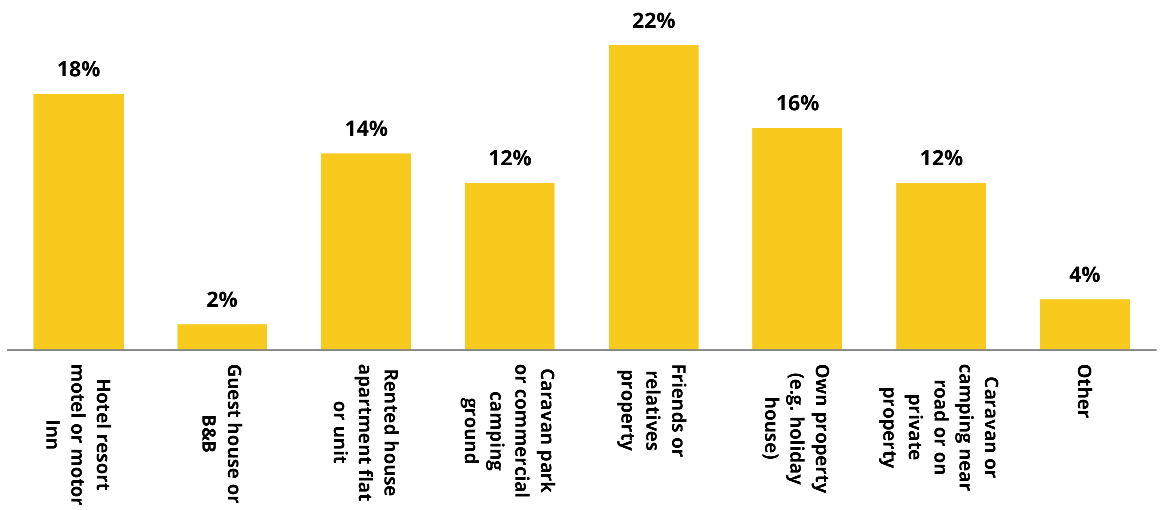
4.9.1. INTRASTATE VISITORS

The following figure highlights accommodation utilised by intrastate visitors to the East Coast. Over the 4 year period assessed (2009 – 2012), intrastate visitors most commonly stayed at friends or relatives places (22% or 36k visitors per annum), followed by hotels, resorts, motels or motor inns (18% or 30k) and at their own properties/holiday houses (16% or 26k visitors).

Guest houses/Bed and Breakfasts were the least utilised form of accommodation, with only 2% (3k) of visitors indicating this as their accommodation type.

The results illustrate the importance of the shackies market (estimated at 38%), whether this be owners staying in their own properties or family and friends using their shacks or staying with them.

FIGURE 29: INTRASTATE VISITORS – ACCOMMODATION USED - 4 YEAR AVERAGE (2009 – 2012)[64]



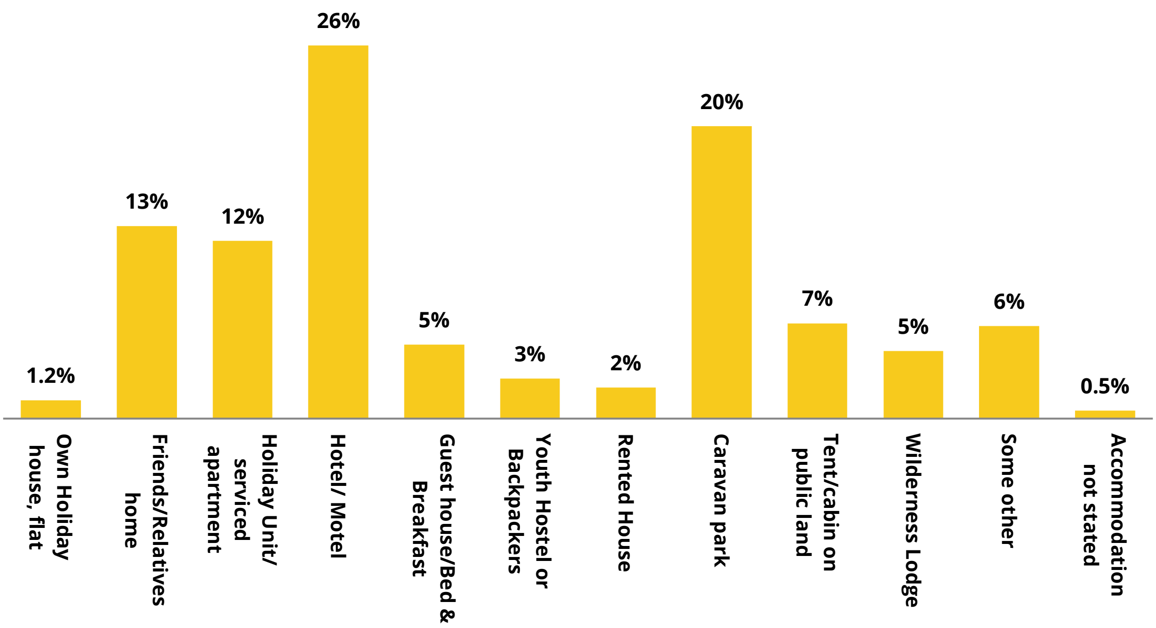
[64] Based on special request data that was compiled by Tourism Tasmania based on TRA data. Data is Sept Year End.

4.9.2. INTERSTATE AND INTERNATIONAL VISITORS

Data for accommodation type utilised by interstate and international visitors to the East Coast is not currently available through the Tasmanian Visitor Survey. In absence of this data, The Group has utilised state level accommodation use data for interstate and international visitors to provide an overview of current state level trends.

Over the 4 year period assessed, interstate and international visitors more commonly utilised hotel/motel accommodation (26% of visitors) followed by caravan park accommodation (20%) and staying with friends/relatives (13%). The least popular form of accommodation (aside from accommodation not stated) was visitors who stayed in their own holiday house (1.2%).

FIGURE 30: INTERSTATE AND INTERNATIONAL VISITORS TO TASMANIA – ACCOMMODATION USED - 4 YEAR AVERAGE[65]

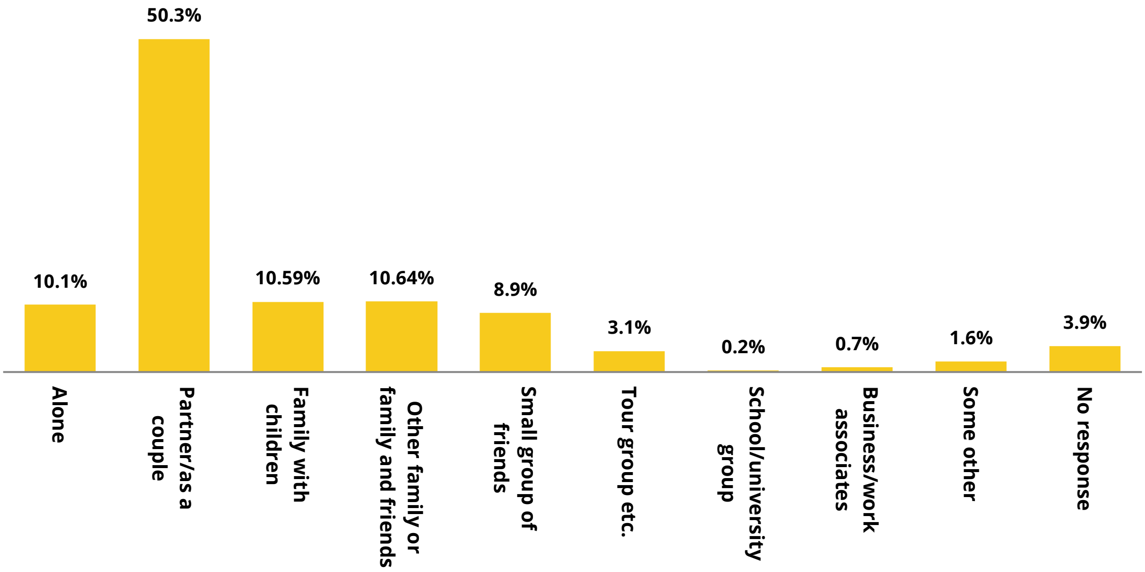


4.10. EAST COAST TRAVEL PARTY - INTERSTATE AND INTERNATIONAL VISITORS

Figure 31 below provides an overview of the type of travel parties to the East Coast over the period 2009 – 2012 for interstate and international visitors. Over this period, the majority of visitors (50% or 133k) travelled with their partner. School/university group travel and travel with business/work associates were the smallest segments comprising of 0.2% (600 visitors) and 0.7% (1.7k visitors).

[65] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

FIGURE 31: TRAVEL PARTY TO THE EAST COAST - 4 YEAR AVERAGE[66]

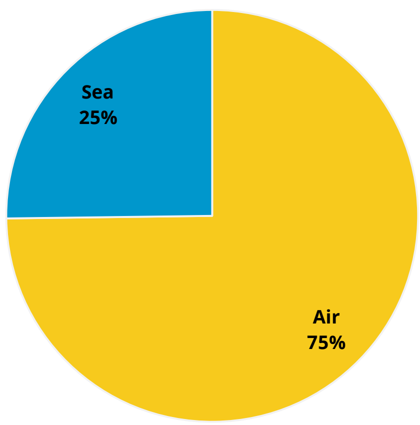


The significance of the "couples" market is very clear and needs to be a focus for marketing campaigns. Of importance is the relatively low level of family market interest which possibly correlates to the lack of sufficient family friendly product currently available in the region.

4.11. EAST COAST MODE OF TRAVEL – INTERSTATE AND INTERNATIONAL VISITORS

Figure 32 demonstrates that the majority of interstate and international visitors to the East Coast travel to Tasmania by air. Over the period from 2009 – 2012, on average, an estimated 75% of visitors to Tasmania travelled by air (198k visitors) whereas 25% of visitors (67k) are said to have travelled by sea.

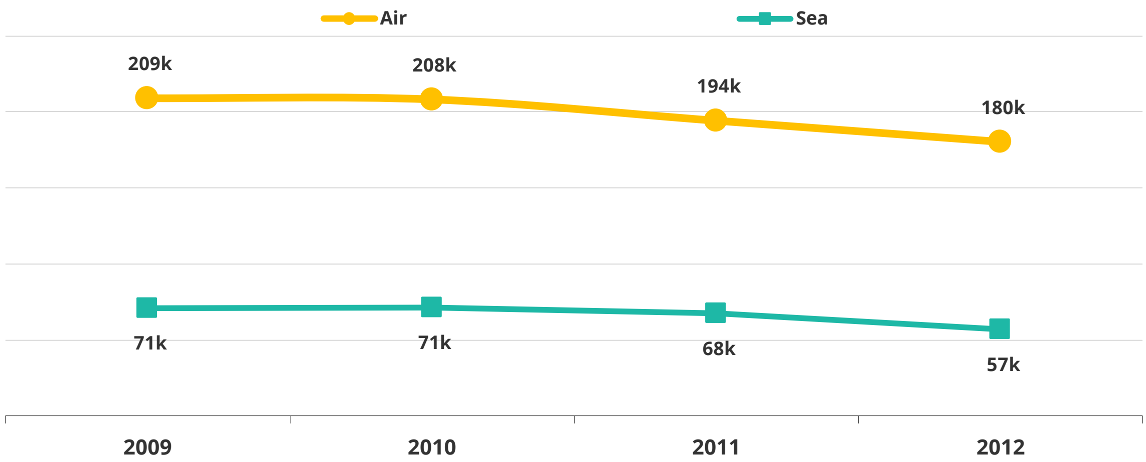
FIGURE 32: MODE OF TRAVEL TO EAST COAST - 4 YEAR AVERAGE – INTERSTATE AND INTERNATIONAL VISITORS[67]



66 Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE
67 Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

In terms of total numbers, air travel has declined the most, falling by almost 29k visitors over the 4 year period from 2009 – 2012 (a total decline of 14%). Sea travel has also declined, falling by 14k travellers, which equates to a total proportional decline of 20%.

FIGURE 33: MODE OF TRAVEL TO EAST COAST - 4 YEAR BREAKDOWN[68]



The RTO and its partners will need to work closely with Hobart and Launceston as these are the primary gateways to the East Coast. This might include joint marketing initiatives, tag on pre and post conference tours to the East Coast and possibly cooperative advertising at both airports etc.

Interstate and international visitors need to be convinced that the East Coast is easily accessible from Hobart, Launceston and Devonport so travel times ex these gateways needs to be highlighted on signage and in marketing campaigns.

[68] Tasmanian Visitors Survey, Tourism Tasmania, September 2009 YE – September 2012 YE

4.12. EAST COAST PRODUCT AUDIT[69]

The following subsections provide an audit of the attractions, accommodation, tours and hireage provides within the East Coast region obtained from the Tourism Tasmania TigerTOUR Database (as at March 2013) as well as online research and feedback from consultation.

4.12.1. ATTRACTIONS

TABLE 6: ATTRACTIONS LISTING FOR EAST COAST

ATTRACTIONS		
42 South Surf School	Freycinet Golf Course	Orford Golf Club
Bay of Fires/The Gardens	Freycinet Marine Farm (Attraction)	Scamander Forest Reserve
Bicheno Blow Hole	Freycinet National Park	Scamander River Golf Club
Bicheno Bowls & RSL Club	Freycinet Whisky Tasting - Freycinet Lodge	Spring Vale Vineyard
Bicheno Golf Club Incorporated	Gallery Artspaces	St Columba Falls Reserve
Bicheno Motorcyle Museum & Restoration	Gala Vineyard - cellar door at Cranbrook	St Helens Golf Club
	Gallery Parnella	St Helens Point
Binalong Bay Ratepayers and Tennis Association Inc	Golden Gate Gallery, The	St Helens Tennis Club
Blueberry Cottage Open Gardens	Gone Rustic	St Marys Golf Club
Cape Tourville Lighthouse	Grasstree Art Studio	St Marys Sports Centre
Cerise-Brook Fruit Orchard and Chip n Putt Family Golf Course	Hazards Vineyard - Devil's Corner, The	Falmouth Tennis Club
Choc - A - Lolly	Heritage Centre	Swansea Bark Mill and Tavern
	Humbug Point Recreation Area	Swansea Bowls Club
Coombend Wine Centre	Iron House Brewery	Swansea Golf Club
Freycinet Vineyards Pty Ltd	Kate's Berry Farm	Swansea Tennis Club
Darlington Settlement	Maria Island National Park	Tasmania Bush Garden
Darlington Vineyard	Mathinna Falls	Tasmanian Seafarers Memorial
Douglas-Apsley National Park	Mayfield Bay Coastal Reserve	The Bicheno Birdlife Park
East Coast Heritage Museum	Milton Vineyard	Triabunna Visitor Information Centre
East Coast Natureworld	Mt William National Park	Waubs Bay, a Gallery
Flavours of the East Coast - Freycinet Lodge	Pyengana Dairy Company	Wavesong Art Studio

[69] Product list has been obtained from Tourism Tasmania from their TigerTOUR database. The Database is a free service for businesses to have their product listed and included for searches through www.discovertasmania.com.au.

4.12.2. ACCOMMODATION

TABLE 7: ACCOMMODATION LISTING FOR EAST COAST[70]

ACCOMMODATION				
9 Mile Escape	Bicheno Caravan Park	Freycinet Lodge	Orford Blue Waters	St Marys Seaview Farm
A Seachange	Bicheno East Coast Holiday Park	Freycinet on the Bay	Orford Seabreeze Holiday Cabins	Swansea Backpacker Lodge
Addlestone House Bed & Breakfast	Bicheno Gaol Cottages	Freycinet Sanctuary	Orford's Sanda House B&B	Swansea Beach Chalets
Alluvion Beach Cottage	Bicheno Hideaway	Freycinet Villas	Oystercatcher House Dolphin Sands	Swansea Cottages
Amos Cottage	Bicheno on the Beach	Freycinet Waters	Pelican Bay Bed and Breakfast	Swansea Holiday Park
Amos House and Swansea Ocean Villas	Bicheno's A-Plus Apartments	Freyscape	Pelican Point Wetlands Retreat	Swansea House
Anchlia Waterfront Cottage	Bicheno's Ocean View Retreat	Greenlawn Cottage	Pelican Sands	Swansea Motor Inn
Anchor Wheel Motel and Restaurant	BIG4 Bicheno Cabin Park	Gum Nut Cottage	Penitentiary Accommodation Units	Swansea Ocean Villas
Apsley Holiday Unit	BIG4 St Helens Holiday Park	Gumleaves	Pettit Cottage	Swansea on the Beach Motor Inn
Ar lan y môr	Binalong Bungalows	Harvey Farm Lodge	Piermont	Swansea Waterloo Inn
Artnor Lodge	Binalong Coastal Waters	Hazards Hideaway	Pub in the Paddock	Sweetwater Villas
Aurora Beach Cottage	Binalong Views	Hillcrest Caravan Park	Queechy Cottages	Tandara Hotel Motel
Avalon Coastal Retreat	Blue Seas Holiday Villas	Homelea Accommodation Spa Cottage and Apartments	Rainbow Retreat Wilderness Eco Cabins	Three Peaks Holiday Rentals
Azure Beach House	Breamstone Retreat	Hubies Hideaway	Redcliffe House	Tidal Waters Resort St Helens
Barton Retreat	Brockley Estate	Iluka Holiday Centre	Rocky Hills Retreat	Tidelines of Bicheno
Bay of Fires Beach House	Carmen's Inn	Island Eden	Room with a View - Bicheno	Triabunna Cabin and Caravan Park
Bay of Fires Character Cottages	Cockle Cove	Island View Motel	Rumah Kita	Twin Lakes Trout Fishery
Bayside Inn	Coles Bay House	Kabuki by the Sea	Saffire Freycinet	Villa Vista
Bayviews Cottage Francis Street	Coles Bay Retreat	Keefers Cottage	Sandpiper Ocean Cottages	Wagners Cottages
Baywatch House	Coles Bay Waterfronters	Lake Leake Inn	Scamander Beach Resort Hotel	Waterline At Freycinet
Beach House - Freycinet, The	Diamond Island Resort	Lake Yalleena Cabins	Scamander Beach Shack	Watersedge Resort/Eastcoast Central
Beach House at St Helens	Diamond Island Resort - Beachfront Villas	Lazy Wave Beach House	Scamander On The Beach	Waves Edge On Freycinet
Beach Path House	Douglas River Cabin	Lester Cottages Complex	Scamander Sanctuary Caravan Park	Weilangta Holiday Home
Beachcomber House	Dove On Freycinet	Long Point Break Cottage in Seymour	Scamander Tourist Park	Weldborough Camping Ground
Beachend	Dragonfly Lodge	Maria Island Camping Ground	Schouten House	Weldborough Hotel
Beachfront Bicheno	Eagle Peaks at Freycinet	Maria Views Bed and Breakfast	Seaview Holiday Park	Whale Watchers Retreat
Beachouse In Bicheno 184 Diamond Island's Door	Eastcoaster Resort	Mariton House	Shell Cottage	Whalers Watch B and B
Bed in the Treetops	Edge Of The Bay Resort	Mayfield Manor	Sheoaks on Freycinet	White Sands Estate
Bicheno Backpackers Hostel	Fingal Hotel	Meredith House And Mews	Shuckers Cottages	White Sands Resort
Bicheno Bayside B&B	Fish-Tales On The Bay	Miranda Cottage	Silver Sands Hotel Motel	Wind Song Bed and Breakfast
Bicheno Beach Stay	Freycinet Beach Apartments	Moana View	St Helens Backpackers	Windows On Bicheno
Bicheno Bella Vista	Freycinet Eco Retreat	Nautica But Nice	St Helens Bayside Inn	Wintersun Gardens Motel
Bicheno Blue Haven	Freycinet Haven	Oakdene Heritage Accommodation	St Helens on the Bay	Woolly Butt Bungalow
Bicheno by the Bay	Freycinet Holiday Accommodation	Ocean Retreat Tasmania, The	St Marys Hotel	
Count	**169**			

[70] The data is accessed from the Tourism Tasmania Tiger Tour data-base. A number of operators have advised that the list of accommodation providers is not complete and a full audit of all accommodation, attractions, and tours is warranted. It is noted that some attractions and tours listed in the data base no longer operate and some listed for the region are actually outside of the region. where possible the data base has been updated for attractions and tours but a full audit of all accommodation providers is required by the RTO.

4.12.3. TOURS

TABLE 8: TOURS LISTING FOR EAST COAST

TOURS		
4 Day East Coast Highlights 2012 - 2013 - AAT Kings	East Coast Cruises	Premier Travel Tasmania
4 Day East Coast Highlights 2013 - 2014 - AAT Kings	East Coast Scuba Centre (Tour)	Rocky Carosi - Professional Charters (Tour)
4 Day Heritage & Culture Tour - APT Tasmania Coach Tour	Eye See Personalised Tours	Rolls on Tour
5 Day The Isle of Azure - Inspiring Journeys	Freycinet National Park	Sail Freycinet
5 Day East Coast Getaway - AAT Kings	Freycinet Adventures + Paddle	St Helens Smoothwater Charters
6 Day Eastern Getaway - Travel Marvel	Freycinet Air	Tasmanian Air Adventures
9 Day Tasman Discovery - Travel Marvel	Freycinet Experience Walk	Tasmanian Expeditions
10 Day Grand Tasman - Travel Marvel	Fun Tassie Tours	Tasmanian Wilderness Experiences
10 Day Tasman Temptation - APT	Gone Fishing Charters	Under Down Under Tours
10 Day Tasmanian Wonders 2012 - 2013 - AAT Kings	Golf Tours Tasmania	Unique Tassie Tours
10 Day Tasmanian Wonders 2013 - 2014 - AAT Kings	Green Island Tours Tasmania	Wineglass Bay Cruises
11 Day Best of Tasmania - AAT Kings	Heli Adventures	World Expeditions
11 Day The Forgotten Coast - Inspiring Journeys	Hooked at Freycinet	Pedal Tours
12 Day Royal Tasman - APT	Intrepid Travel	
Adventures Today	Jump Tours	
All4Adventure	Keen Angler Charters	
Bay Of Fires Dive		
Bluewater Sportsfishing Charters	Life's An Adventure	
Bicheno Dive Centre (Tour)	Long Lunch Tour Co	
Bicheno Penguin Tours	Maria Island Ferry and Eco Cruises	
Bicheno's Glass Bottom Boat	Maria Island Walk	
Devilmania Tours & Charters		
Count	**63**	

4.12.4. TOURISM EQUIPMENT HIREAGE

TABLE 9: TOURISM EQUIPMENT HIREAGE LISTING FOR EAST COAST

EQUIPMENT HIREAGE	
Bicheno Dive Centre (Hire)	Moto Adventures Tasmania
Coles Bay Hire	Rocky Carosi - Professional Charters (Hire)
East Coast Scuba Centre (Hire)	St Helens Marine Services
Count	**6**

5. KEY FINDINGS

5.1. ACCESS INTO THE REGION

For a variety of reasons, the region benefits from a strong link to Hobart through Orford as a southern gateway to the region and from Launceston via the Midlands Highway connecting to the coast through the Fingal Valley via St Marys as the gateway. There are also other access points to the region via Scottsdale in the North as well as the alternative road from the Midland Highway linking across to Swansea and just south of Bicheno (Lake Leake Highway).

The importance of these access points is not lost on the shackies market making the East Coast highly accessible (1 hour from Hobart) and approximately 1.5 hours from Launceston. From a visitor market perspective the two primary air gateways into Tasmania (Hobart and Launceston) are therefore easily accessible and provide a number of short break opportunities linking as follows:

- Visitors to Hobart linking into day trips or overnight experiences to Coles Bay and other locations;
- Visitors to Launceston linking into Bicheno and St Helens in the north;
- Linking with cycling clubs and car clubs as the roads throughout the region are noted as being ideal for cycling and driving;
- The short break leisure market looking to come into Tasmania either through Hobart or Launceston and to travel into the East Coast Region before egressing from either Launceston or Hobart so that an effective lineal short break excursion is possible (heading north or south); and
- The traditional 7 - 14 day touring route through Tasmania with the East Coast Region being accessed through the north or through the south and with the potential to develop increased length of visitor stay.[71]

[71] Whilst we note the desire to continue to focus on this longer stay touring market industry, feedback indicates the 1-2 week touring visitor is harder to stimulate for greater length of stay.

Though some stakeholders interviewed commented on the need to upgrade the road quality particularly from the Midland Highway across to St Marys and the coast, as a one off experience this road seems reasonably adequate as an access highway. For locals regularly travelling this route, we can understand the desire for passing lanes and better road conditions.

With a picturesque river often following the highway through the Fingal Valley, consideration could be given to creating a couple of additional lookout areas to encourage visitors to stop and have a break. With the amount of heritage and cultural history in the region there may be good opportunities to create attractive interpretation boards which could be positioned at lookouts and pull over areas to potentially theme the access roads into the region so they become "experiences" rather than merely access roads.

Most importantly, there is a need to actively encourage visitors to stop at St Marys with its potential to offer a number of smaller scale and interesting collection based experiences (Cranks and Tinkerers Museum and possibly a weekend veteran/vintage car exhibition). St Marys could also potentially offer easily accessible archaeological digs enabling visitors to stop and watch or even participate under supervision.

With respect to the access point via Buckland in the South of the region, the quality of the road is not seen as a deterrent. The bridge over the Prosser River at Orford provides an attractive southern gateway into the region (we do note that the Local Government Area actually extends further south but feel that the road bridge has potential as a visual gateway for the East Coast) and would benefit from potentially an attractive large sign board to highlight that travellers/visitors are now entering the unique East Coast Region. It may be possible to find an existing major sign to be re-skinned with East Coast brand imagery or this could be an initiative given to Glamorgan Spring Bay Council to jointly (with ECRTO) take up with DIER to find a site and get approval. There is a need to create a logical point of arrival for the region even if this is in Orford rather than Buckland. This is needed to help differentiate greater Hobart/Sorell area from the East Coast and create a strong sense of arrival into a new region.

5.2. SIGNAGE INFRASTRUCTURE

Virtually all of the stakeholders interviewed have commented on the need to expand and upgrade the quality of directional and interpretive signage into and within the East Coast Region. With important historical and heritage significance in the region the opportunity exists particularly to provide interpretive signage via storyboards and other mechanisms to create greater motivation to stop and experience the region.

With respect to directional signage the general observation is that most locations are well sign posted (the various towns) though probably more directional signage would assist for places of interest. Consideration should also be given to adding in driving times between towns and places of interest to encourage greater regional dispersal. For example, explaining the relatively close proximity of Swansea to Coles Bay and Bicheno could help increase longer length of stay in the region.

5.3. ROAD INFRASTRUCTURE

The main roads through the East Coast are apparently recognised by many motor bike groups and individual riders as offering a highly attractive and interesting ride for them. Winding roads coupled with long straights provides a mix of road conditions which many find desirable.

Within time, the region would benefit from a number of passing lanes particularly to enable people to safely overtake caravans and vehicles towing boats etc. In the interim, the nature of the road system does mean most motorists do need to slow down a bit particularly as traffic builds up behind slower vehicles and with limited places at times to safely overtake.

With stunning coastal vistas as well, consideration should be given to upgrading the quality of lookout areas and introducing more of these to benefit travellers in cars and on cycles etc.

5.4. PARKS AND WILDLIFE

5.4.1. LACK OF RESOURCES

The major tourism stakeholder in the region is the Tasmania Parks and Wildlife Service who manage high profile national parks including Freycinet National Park, Maria Island National Park, Douglas Apsley National Park, the Bay of Fires Conservation Area and the Blue Tier. The State Government agency has limited resources to market the national parks in the region.

The Freycinet National Park has the highest visitation of any National Park in Tasmania with just over 188k visits per annum (Cradle Mountain has an estimated 152k visits per annum).

Parks and Wildlife have indicated their interest in partnering with the RTO, industry and other stakeholders to better promote the East Coast national parks. We also note that over the last 4-5 years, investment has gone into upgrading the car park, access road, visitor centre and lookout at Freycinet National Park. Over time the need is seen to also look at infrastructure upgrades for the other important national parks and conservation-reserve areas managed by Parks and Wildlife on the East Coast.

However, we appreciate that as the most visited national park, Tasmania Parks and Wildlife have correctly invested greater amounts in Freycinet which in turn supports far higher visitor numbers than the other parks and conservation areas in the region. We do note however that there are car parking capacity issues at peak periods at Freycinet National Park.

We also understand that whilst the Bay of Fires Conservation Reserve reaches capacity limits at times, there is spare visitor growth capacity at Freycinet. Freycinet can therefore continue to act as the catalyst to help attract more visitors not only to Freycinet but for follow up visits to the other parks and conservation areas on offer.

5.4.2. FREE CAMPING

Discussions with Parks and Wildlife indicated that a major challenge on the East Coast is the provision of free camping sites. Most camping sites are either free of charge or have an honesty box system, which we understand, is often not supported. As a result of the unregulated camping sites, feedback received indicated that many campers stay at sites for vast periods of time and consequently, there is often little room for genuine travelling visitors who are seeking to stay for a few nights only.

Discussions with Parks and Wildlife indicate the following may offer a potential solution for all camping sites in the East Coast (this will need a collective response from all agencies who currently offer camping sites within the region):

- Each site could have up to 30 free camping sites which are un-bookable and available on a first-come, first-served basis but which do not have supporting infrastructure;
- Assign a number of level 1 sites which are designated sites you can book and which have toilet and BBQ facilities and which are paid for;
- Assign a number of level 2 sites which have specific sites you can book online, toilets, BBQs, and shower facilities and need to be paid and booked in advance;
- Assign a number of level 3 designated sites which offer all of the above plus are fully powered sites; and
- Assign a number of level 4 sites which offer the full glamping style experience, though it is far more up market.

The issue of free camping and near permanent users' needs to be addressed as a high priority for the East Coast.

5.5. ACCOMMODATION OCCUPANCY RATE

A number of stakeholders in the accommodation sector highlighted that the accommodation occupancy rate for the East Coast, provided by the Australian Bureau of Statistics (ABS) does not appear to correctly demonstrate the level of occupancy they are experiencing.

One of the reasons for this could include the use of a small sample size which does not accurately reflect the accommodation mix in the East Coast. For example, the accommodation mix in the East Coast is largely comprised of small self-contained properties and bed and breakfast establishments.

Within the TigerTOUR Database provided by Tourism Tasmania, there were over 150 accommodation establishments listed for the East Coast. The following table indicates the number of accommodation operators based on their number of rooms:

TABLE 10: ACCOMMODATION ROOM SIZE SUMMARY

SIZE	NUMBER OF OPERATORS
Less than 5 rooms	96
5 rooms - 9 rooms	24
10 rooms – 14 rooms	7
15 or more rooms	25

As indicated by the above table, a large majority (63%) of all accommodation operators in the East Coast which has less than 5 rooms. The accommodation occupancy data produced by ABS includes only the following accommodation establishments:

- Licensed hotels and resorts with facilities and 5 or more rooms (which fails to pick up on 63% of East Coast accommodation operators);
- Motels, private hotels and guest houses with facilities and 5 or more rooms;
- Serviced apartments with 5 or more units;
- Caravan parks with 40 or more powered sites;
- Holiday flats, units and houses of letting entities with 15 or more rooms or units; and
- Visitor hostels with 25 or more bed spaces.

The RTO needs to look at developing an annual accommodation survey to ensure more accurate statistics can be created for the region and updating this annually. Industry would also benefit from knowing what the average achieved occupancy rates were when the establishments with less than five rooms are included.

5.6. LACK OF REFURBISHMENT OF ACCOMMODATION

The vast majority of larger size (40+ room commercial accommodation establishments) have not been refurbished for some time and owners appear reluctant to undertake refurbishment that is urgently required. Unfortunately, low occupancy levels and low revenue per average room (REVPAR) results are making it hard for owners/investors to refurbish. As a result, this makes it hard for the RTO to undertake cooperative advertising with product which is of a variable quality.

5.7. NO MAJOR COMMERCIAL ATTRACTIONS/RESORTS

There are no major commercial based visitor attractions, no large scale resorts or hotels, no significant transport operators (charter flight operations or major ferry operators) so there is limited private sector marketing funds to help leverage off. This requires both of the Councils to take a more active role, along with State Government agencies, where possible.

5.8. LIFESTYLE OPERATORS

There a significant number of possible lifestyle operators rather than full commercial players partly due to the short tourism season (3-5 month) and partly because many have moved to the region for lifestyle or retirement purposes. Their needs and aspirations do differ from fully commercial players as previously noted.

5.9. SEASONALITY 3-5 MONTH VISITOR SEASON

The effective tourism season for many operators is only a 3-5 month period which significantly impacts on profitability, occupancy levels and achievable yield. This is the major issue which industry operators wish to have addressed.

5.10. LARGE NUMBER OF BUSINESSES FOR SALE

A significant number of tourism businesses in the region are actively on the market to be sold. As a result, there are a number of for sale marketing sign boards which give the impression that the region may have significant problems for business. There is little which can be done to change this other than hoping that businesses sell quickly and new owners have the ability to refurbish and upgrade facilities wherever needed.

5.11. QUALITY AND PRICE OF FOOD AND BEVERAGE SERVICES

The quality of food and beverage services, as well as accommodation in particular, is highly variable and many establishments (including general food and beverage retail) appear to be charging high prices without a commensurate quality of product or service.

5.12. TRANSPORT TO TASMANIA

5.12.1. AIR TRANSPORT TO TASMANIA

A challenge for attracting visitors to the region (and Tasmania in general) revolves around accessibility to the island out of peak season which is limited. Of all the visitors who travel to Tasmania, the majority travel by air (85%),[72] with the remaining travelling by sea (15%).[73] As there are no direct international flights to Tasmania, international visitors must first stopover and transfer to a domestic flight at Brisbane, Sydney or Melbourne airport, often adding an additional 3+ hours of travel time to the long-haul flight.

The table below provides a breakdown of average rather than lowest cost airfare pricing structures for domestic return flights into Hobart and Launceston, ex Melbourne, Sydney and Brisbane. In most cases, Jetstar offers the cheapest flights to the region. It is also important to note that providing the visitor has flexibility to often travel at less convenient times of the day it is possible to secure much cheaper airfares than those noted in Table 11 at times so those shown below are not the cheapest flights available. However the number of discounted airfares is heavily restricted making it highly competitive to secure one or more cheaper airfares if travelling as a group.

TABLE 11: FLIGHT COST COMPARISON TO HOBART AND LAUNCESTON

FLIGHT COST COMPARISON TO HOBART & LAUNCESTON								
Length of Time before dept date:	One Week		Two Weeks		One Month		Two Months	
Jetstar	To Hobart	To Laun.	To Hobart	To Laun.	To Hobart	To Laun.	To Hobart	To Laun.
Ex Melbourne	$250	$190	$180	$140	$116	$110	$116	$110
Ex Sydney	$280	$280	$230	$160	$250	$190	$170	$150
Ex Brisbane	$814	$524	$646	$356	$496	$326	$358	$276
Qantas								
Ex Melbourne	$298	$378	$328	$278	$230	$194	$198	$138
Ex Sydney	$429	$561	$418	$439	$388	$376	$304	$344
Ex Brisbane	$479	$647	$480	$535	$478	$462	$338	$430
Virgin								
Ex Melbourne	$369	$368	$290	$198	$194	$164	$178	$130
Ex Sydney	$324	$270	$278	$238	$266	$274	$218	$278
Ex Brisbane	$584	-	$450	-	$358	-	$320	-

** Return trip with baggage. Stay of one week from arrival time included. Based on lowest price from carrier. Prices obtained from webjet.com*

[72] Air services are operated by (in order of capacity) Jetstar, Virgin, Qantas, Qantaslink and Tiger Airways
[73] Tourism Fast Facts – A quick guide to tourism in Tasmania at September 2011, page 2.

Carriers are sometimes hesitant to expand services into Hobart and Launceston as a result of the level of demand due mostly to seasonality factors.[74] In order to encourage carriers to consider increasing frequency, there needs to be a shift in current demand trends for the region including growth in business tourism, conferencing and events which yields far higher returns for airlines than VFR or traditional leisure travellers often heavily influenced by cheap airfare deals.

Additionally, feedback indicated that the lack of product packaged up with an airfare particularly relating to events etc. is a drawback. Further investigation is needed into how carriers and industry can effectively collaborate and establish packages to encourage visitation, particularly during periods where festivals and events are held on the East Coast. It is also important for the East Coast to illustrate that it is able to offer new and exciting day and over- night packaged experiences which can tag into a Hobart or Launceston short break experience.

5.12.2. FERRY TRANSPORT TO TASMANIA

Since 1993, ferry transport from mainland Australia to Tasmania has been serviced by the Spirit of Tasmania, TT-Line. The service runs on average once daily and operates between Melbourne and Devonport. Anecdotal feedback received from industry sources indicates that ticket prices are quite high, particularly when compared with air travel which offers a much quicker trip time.

The table below provides a summary of ticket prices based on the period in advance that the ticket is booked. Tickets booked one week in advance are $168 more expensive than those booked 2 months in advance. An implication of this price difference is that individuals are less likely to participate in impulse or spontaneous travel due to large price differences.

Other points to note include:

- The cost of booking one Ocean Recliner Spirit Fare one week in advance is $366. If the passenger chooses to bring a car and caravan along, this takes the total ticket price to $1,350[75]. If however, the passenger only brings a large campervan along, the total ticket price is only $564;
- The cost of booking one Ocean Recliner Spirit Fare two months in advance is $198. If the passenger chooses to bring a car and caravan along, this takes the total ticket price to $1,000. If however, the passenger only brings a campervan along, the total ticket price is $396; and

[74] Anecdotal feedback from industry sources
[75] The reason for the significant cost increase is because the Federal Government passenger subsidy offered only covers single vehicles and not caravans, boats or trailers.

- This indicates that although the ticket price reduces based on a longer length of travel lead time, the price to bring caravans/campervans etc. does not drop significantly unless travelling without a vehicle.

TABLE 12: COST OF FERRY TO TASMANIA

SPIRIT OF TASMANIA - COST COMPARISON				
Length of Time before dept date:	One Week	Two Weeks	One Month	Two Months
Ocean Recliner Spirit Fare	$366	$338	$310	$198
plus car	$178	$178	$178	$178
plus car and caravan (2m length, over 2.1m height)	$984	$984	$802	$802
plus Campervan	$198	$198	$198	$198

It has been found that travelling to Tasmania via the Spirit of Tasmania is more economical when length of stay is over 9 days and when a car is brought along.[76] Travelling with a car negates the need to hire a car which on average, costs approximately $600 for 9 days of car hire.[77] If individuals do not require transport, or are travelling for a shorter period of time (such as a weekend), travelling by air is more cost and time effective.

For the East Coast region, the need is seen to work closely with the airlines to package up short break options, especially out of peak season. The relatively short drive time from Hobart and Launceston to the East Coast would need to be highlighted as an obvious advantage.

The RTO should also look to work with the two other RTOs who are on its boundary for joint marketing initiatives, especially where day trip options and overnight excursions to the East Coast can be included.

[76] As discussed and confirmed with Tourism Tasmania
[77] Based on Thrifty car rental rates for a small economy car, for a period of 9 days

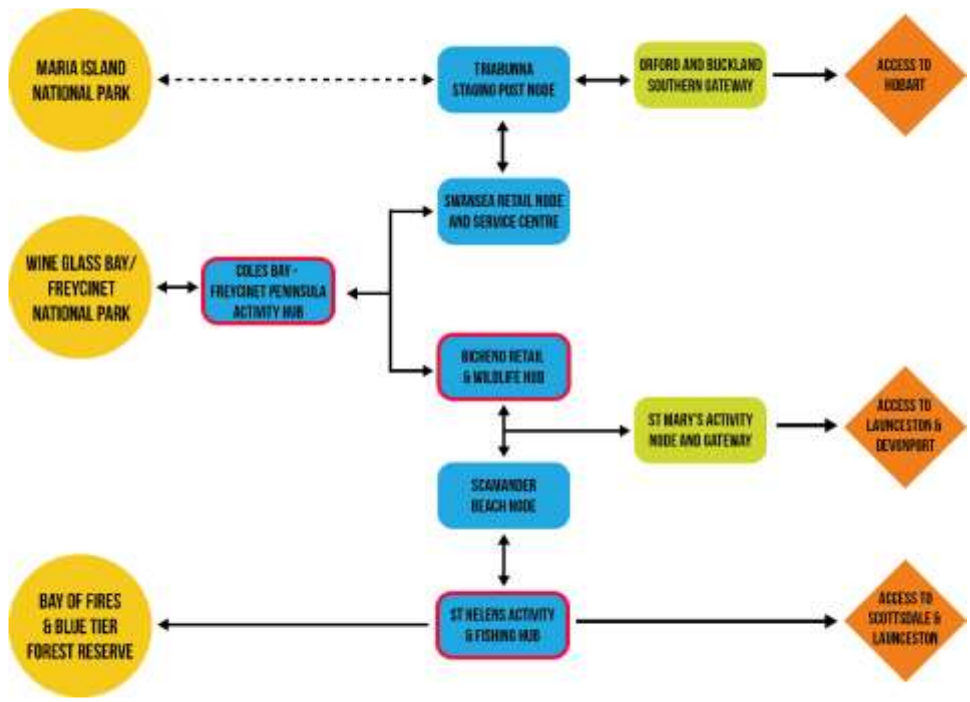
6. DESTINATION DEVELOPMENT

6.1. TOURISM HUBS AND NODES

There are a variety of hubs and nodes which effectively make up the East Coast as a tourism destination. Overtime, the potential exists to redefine specific nodes so they can become actual destination hubs in their own right rather than being a support node for a hub. In this respect, the hubs are denoted as destinational points which offer a variety of experiences and the nodes are important links to these hubs but currently are seen to lack sufficient destinational attributes. The diagram which follows highlights the positioning of various towns as either hubs or nodes with specific reference.

The diagram also illustrates the importance of the region working together as a holistic destination which can take advantage of various gateways. The two Councils therefore have a leadership role to play in making sure that industry works collectively together as the collective proposition is far easier to market and promote than individual nodes or hubs. The RTO is there to coordinate this outcome in partnership with Councils.

FIGURE 34: TOURISM HUBS AND NODES



6.1.1. SOUTHERN GATEWAY/BUCKLAND

The primary Southern Gateway for the region is Buckland which is just under an hour's drive from Hobart.

6.1.1.1. Signage improvements

Gateways play a vital role to help distinguish one area or region from another. For this reason, if it is possible to create an attractive and large sign board on the Southern Gateway (before the bridge over the Prosser River at Orford), it will help reinforce to visitors that they are now entering not merely a spoke from Greater Hobart but a dedicated and unique region in its own right.

6.1.1.2. Solis site assessment

To strengthen Orford, consideration needs to be given to reassessing the proposed Greg Norman Golf Course, Resort Hotel and major residential development proposed. We understand that the area designated is close to 1,300ha which is a significant site and that this project in its various forms has been around for quite some time. If projects are not proceeded with, there is a distinct risk particularly in the current economic climate that they are seen to be either non bankable or too high a risk. Regardless of whatever reasons there have been for the lack of development proceeding we understand that there are a variety of attributes for this site including but not limited to:

- The fact that the area contains freehold waterfront land which is now rare;
- Is easily accessible from the main highway;
- Preliminary earthworks have been done as part of the golf course layout; and
- The potential may exist to look at the waterfront component of the land particularly and to identify a variety of less ambitious project opportunities.

If the project is able to start soon, it should be actively encouraged.

6.1.1.3. Promotion of Buckland walking tours

The Group notes that there are a number of walks throughout the Buckland region, including the Bluff River Walk which we understand is documented in a number of German guide books. The opportunity exists to promote these walks and tie them in with food experiences available at Brockley Estate etc.

Consultation would need to be undertaken with the owner of Brockley Estate Station as we understand that part of the Bluff River Walk lies on the Station and insurance liability issues may exist.

6.1.2. STAGING POST - TRIABUNNA

Glamorgan Spring Bay Council have indicated that as Triabunna is off the main highway (though not so far away) it is significantly harder to encourage passing traffic to stop and spend. A variety of development plans are noted including:

- The Boatel Development on the waterfront which includes marina berths to be developed in stages;
- The realignment of roads near the waterfront to allow for the Boatel Development to proceed; and
- The prospect of refurbishing the Old Stone Barracks buildings in Triabunna which offer good heritage value.

The committee facilitating the creation of the Spring Bay Marine Discovery Centre is currently looking for suitable land for what could be an important all weather visitor attraction in Triabunna. Triabunna is in need of visitor amenities to help support increased visitation and related visitor spend patterns. This in turn will help facilitate new investment into existing facilities as well as new projects.

Council has created Triabunna as a staging post and main access point to Maria Island. The current two ferry services operate from Triabunna and a variety of seating, signage and other infrastructure is on the wharf created for this purpose.

We note that Parks and Wildlife are about to review the ferry access to Maria Island, along with possible infrastructure upgrades on the Island. The outcomes are expected to help grow the visitor numbers to the Island which currently number approximately 12k (we note that previously Maria Island received up to 28k visitors per annum). Maria Island visitor growth could have a highly beneficial economic impact on Triabunna resulting in further investment, employment for locals and strengthening of the town as the staging post to the island.

6.1.2.1. Expanded retail facilities

We note council's strong desire for Triabunna to have a greater role particularly as an economic hub for the Local Government Area. The potential may exist for a variety of expanded retail facilities based on increasing the resident population. The rate payer base is noted as small and the geographic size of the Council area is quite large and challenging to maintain.

Development of marina facilities at Triabunna is expected to greatly assist the viability of existing and new retail support services.

6.1.2.2. Marina development over a number of stages

As Triabunna offers a deep water anchorage, the potential exists to create a substantial marina development over a number of stages. If this marina development was to reach its potential, this would drive the rationale and viability for a number of expanded service facilities and retail outlets to meet the needs of those with boats moored in the marina. In turn, this could drive the need for further marina based accommodation facilities which could actively encourage more overnight visitor stays into Triabunna.

The proposed marina development is seen as the primary catalyst project for the LGA which in turn will help support a number of new retail and tourism ventures.

6.1.3. RETAIL NODE/SWANSEA

Swansea performs an important position as a retail node with a number of cafes, petrol outlets, some commercial accommodation as well as general retail facilities. It is not seen as a tourism hub yet, but rather as an important retail node to support tourism growth in the general locality.

6.1.3.1. Staging post for wetland areas walking track

Potential exists to position Swansea as a staging post for a water edge walking track which could be used to access the wetland areas around Great Oyster Bay and which may be able to provide spots for bird watching. A feasibility study for this is required to test the practicality of developing a coastal walking track etc.

6.1.3.2. Small winery trail

We understand that there are currently nine wineries located in and around Swansea and extending north along the coast. Potential exists to create a small winery trail through the region with the possibility of positioning Swansea as the wine hub for the East Coast.

An opportunity exists to assess the development of a wine interpretation centre in Swansea which could provide a base for offering information on different wineries and food experiences currently available throughout the region. The wine interpretation centre should ideally be located in a waterfront or heritage building if possible and could encourage far more people to stop and spend money in Swansea.

FIGURE 35: MORRIS GENERAL STORE IN SWANSEA (HIGH PROFILE WATERFRONT SITE)

A feasibility would need to be undertaken on the cost and benefits of doing so and would need to involve consultation with building owners to see if there is any interest in doing this.

6.1.3.3. Great Oyster Bay foot bridge/cycle way

Potential may exist to develop a bridge/cycle way over Great Oyster Bay which could potentially connect Swansea to the Freycinet Peninsula. It is our understanding that this would require a bridge and could provide visitors with a short cut for accessing the Peninsula.

The following figure provides an overview of the location of the foot bridge.

FIGURE 36: POSSIBLE WALKWAY/CYCLE WAY

6.1.4. COLES BAY/FREYCINET PENINSULA ACTIVITY HUB

The most developed tourism hub per se in the region is Coles Bay. A variety of high quality boutique resort lodges as well as B&B's and small scale accommodation facilities operate within Coles Bay along with a small number of activity operators (four wheel biking, sea kayaking, boat cruises). It provides the best example of effective industry collaboration in the region currently and other industry collaborative clusters need to be nurtured in similar fashion.

Whilst there is always a need to update and refresh product, great care is needed to maintain the careful balance which exists in Coles Bay between community and tourism operators needs and expectations. We would caution against too much tourism development expansion at Coles Bay in favour of encouraging the strengthening of alternative visitor nodes in other parts of the region. This should not prohibit existing operators however, where appropriate from being able to expand existing operations as we note the struggle many have in maintaining profitability; this is likely to correlate to insufficient room inventory and/or lack of supporting amenities and facilities which many visitor markets now expect.

There are issues as well with the level of road kill which occurs on the road into Coles Bay and a need to both reduce this highly visible impact as well as identifying a process for sympathetically removing road kill, noting that the peninsula is predominantly the Freycinet National Park.

6.1.4.1. Leverage off profile of Wine Glass Bay and Freycinet National Park

The existing profile in marketing material of Wine Glass Bay in particular as well as Freycinet National Park are well recognised. It has the highest profile of any part of the East Coast Region currently and every effort should be made to leverage off the profile and the success of this hub to support other initiatives within the region. In doing so, it is important to note that the profile is supported by well-run 2, 3, 4 and 5 star accommodation establishments. There is a need to avoid profiling the East Coast as a 5 star region when the vast bulk of accommodation product are facilities primarily of a 2-4 star standard.

6.1.4.2. Strengthen link between food and beverage experiences

It is also important that the link between food and beverage retailing (the Oyster Farm as an example) and tourism accommodation providers is strengthened as this could become a very important hub for food based experiences as much as eco activity experiences.

6.1.5. BICHENO RETAIL AND WILDLIFE HUB

The Penguin Tours and Natureworld at Bicheno are well known and Bicheno acts as an important tourism service town to a wider catchment area. It is an important retail and wildlife hub so it does have a clear focus. There are a number of cafes and other food outlets as well as other retail providers which make it a particularly important hub for tourism activity with many shackies purchasing supplies from Bicheno.

Bicheno could act as the start or end point for various coastal walks as well as linking to Scamander and even St Helens. We note that the town offers a very quintessential shackie experience and the local community are keen to retain this relaxed look and feel.

The opportunity also exists to leverage off the highly successful Bicheno Food and Wine Festival which generates approximately 4k visitors. The Festival needs to be actively promoted and developed further with other initiatives in winter such as the Bicheno Long Lunch etc.

6.1.5.1. Urban Streetscape Plan

Bicheno would also benefit from an urban streetscape plan to offer more attractive landscaping, including outdoor seating etc. as it currently is a “drive through” destination without adequately telling the visitor what is on offer and the lack of attractive landscaping, especially at the entrances of the town, do not compel the visitor to slow down and stop.

There is no reason for the relaxed shackie atmosphere of Bicheno to be lost or altered; rather, improvements to the streetscapes should enhance the reason to stop and experience it.

6.1.6. ST MARYS ACTIVITY NODE AND GATEWAY

The primary access route and better quality road is through the Fingal Valley from the Esk Highway across to the coast via St Marys. St Mary’s offers and attractive place for visitors to stop and break their journey.

6.1.6.1. Classic car display

We note that a number of people living in St Marys and the wider Fingal Valley are active tourism operators including the Cranks and Tinkerers Museum which offers a unique experience. In addition, we understand that there are over 50 classic cars owned by a variety of people in St Marys and environs. The potential may exist to display some of these as part of a possible visitor attraction on weekends especially and possibly to investigate potential for a permanent display centre.

6.1.6.2. Archaeological Excavation Trail/Attraction

Potential also exists to focus on archaeological excavation to highlight the various blacksmiths and historic sites in St Marys. We understand that some of these sites are located along the main highway through town and could provide a drawcard for people to stop, watch and even participate in the activity under supervision.

This could also provide an opportunity to promote to university students studying archaeology to visit St Marys and undertake an archaeological dig as part of their university studies. This could present a higher profile way of raising people's interest and encouraging visitors to stop in St Marys, rather than just passing through the town.

6.1.6.3. Road enhancements

The Group understands that some design work has been undertaken on enhancing the main street of St Mary's (included in Appendix 2). This work included:

- Widening the footpath on the shop side of the main street to allow for tables and chairs and umbrellas to be placed outside cafes so people can see people enjoying themselves;
- To boulevard the main street at either end so it looks more attractive;
- To improve the quality of the public toilets as feedback received indicated that the quality of the public toilets was a major factor for encouraging people to stop;
- To consider changing the current parking arrangement so that cars have to park parallel to the kerb as opposed to a 45° angle. Whilst this will reduce the number of car spaces, it may encourage people slow down and therefore not only drive more carefully but allow drivers to be more aware of their surroundings which can encourage them to stop and spend.

Consideration should be given to developing a feasibility study which looks at the benefits and cost of undertaking these changes and looks at possible grants which may assist for undertaking the work.

6.1.7. SCAMANDER BEACH NODE

Scamander offers an attractive beach side location which has relatively safe swimming which is not always the case along the coast. It is a location between major towns (Bicheno and St Helens) and provides the opportunity to stop and purchase refreshments or to visit the beach specifically. The beach also offers good surfing conditions and is a recognised fishing spot.

6.1.7.1. Feasibility for upgrading/refreshing accommodation

The challenge with Scamander is the level of refurbishment required for some of the more significant room stock which along with a number of other locations in the region, needs to be refreshed to improve the overall image.

6.1.8. ST HELENS ACTIVITY AND FISHING HUB

St Helens is the largest town centre within the region reflecting the greater population base in Break O'Day Council area compared to Glamorgan Spring Bay Council area. Council have already undertaken some development planning work for its waterfront which offers a highly attractive gateway into the town.

6.1.8.1. Waterfront development

While Council's priority is currently the creation of a walkway around the bay, the greatest opportunity for tourism is likely to be generated by appropriate mixed use development on the waterfront which could include:

- A fishing activity centre including retail (a commercial outlet);
- Visitor Information (ideally integrated with commercial activity but which could be operated by council potentially);
- Displays on Indigenous culture and history, with information on local Indigenous sites of significance. This could also reflect the techniques with which Indigenous Australian's previously fished as one example;
- The creation of a fishing club or at least a fishing lounge bar area at a first floor level which promotes the sport fishing hub which St Helens is recognised as (marlin, tuna etc.);
- Potential for retail and booking space for seasonal charter boat operators, seasonal activity operators (sea kayaking, paddle boards, other water based activity operations);
- Potential facilities for a scuba diving operator if the scuba diving around the general area is of sufficient quality and there is a proven demand;
- The opportunity to integrate additional cafes to service the passing trade (tour groups as well as free independent travellers); and
- Other forms of mixed use development including office suites, boat chandlers etc.

As the waterfront area is adjacent to the current town centre, there would be appropriate synergy between them and the waterfront development should not negatively impact on the town centre.

6.1.8.2. Visitor centre location

The Group notes that the existing visitor centre is tucked in with the heritage room and library but would benefit from being in a gateway location coming into St Helens and the waterfront area which already has an information billboard/kiosk as well as public toilets with shower facilities would provide and excellent site if this shown to be functional and available. The visitor centre could be integrated into the waterfront development complex noted above.

6.1.8.3. Signboards to promote experiences in the region

St Helens is also the staging post for visits out to the Bay of Fires and Blue Tier Conservation Areas and the opportunity exists to create attractive signboards to profile these and other experiences which this important activity hub can offer.

6.1.9. BAY OF FIRES

The Bay of Fires is a conservation area managed by Parks and Wildlife. It has very high brand awareness but lacks commercial operations and built product. It offers a number of walking trail experiences and free camping sites. Attempts have been made previously to construct lookouts-viewing platforms but we note these have generated strong community objections.

Feedback from community highlights concern over the risk of development occurring in an inappropriate manner on one hand, whilst recognising the need for sensitive development to stimulate greater market appeal and economic benefit[78] on the other.

Once Parks and Wildlife have determined their revised camping strategy (to allow a mix of free and paid for sites and including the introduction of support facilities such as shower blocks etc.) the Bay of Fires may gradually develop as an important tourism node in the north of the region. For the time being however, it is noted that it suffers from capacity issues with existing camp sites during peak periods and has very limited supporting infrastructure (car parking etc.).

[78] As evidenced through employment for local people, greater visitor length of stay and spend in the area and further investment.

6.1.10. BLUE TIER

The Blue Tier is a conservation area managed by Parks and Wildlife. It offers a variety of mountain biking trails and walking trails but lacks sufficient signage and interpretation as well as supporting infrastructure including car parking, camping grounds etc.

The potential exists to develop Blue Tier for a variety of park based recreational pursuits once it is has adequate supporting infrastructure. The area could lend itself to glamping experiences subject to environmental and marketing assessments to verify its potential and ability to cope.

6.1.11. MARIA ISLAND

Maria Island is noted for its existing high quality 4 day walking tour experience, for its significance convict ruins and unique fauna and flora. Whilst the island used to get up to 28k visitors 20 years ago, it now receives around 12k.

A recently released study on market demand for the island indicates it has capacity to cater for up to 28k visitors subject to a variety of changes occurring, including extending current visitor infrastructure including toilet facilities etc.

The study also recommends consolidating transport services to the island from Triabunna by offering a larger capacity ferry service and also recommends an alternative management model for how the island should be developed further whilst retaining its unique character and significance.

The island already receives visits from cruise ship passengers who use lighters to access the island whilst the cruise ships can berth off shore.

Maria Island offers the potential to significantly grow visitation, to support more facilities on the island and generate stronger economic benefits for Triabunna as its staging post. These benefits are predicated on Parks and Wildlife investing in the island, in working with stakeholders to better promote the island experiences and in developing more marketable product on the island.

6.2. MOBILE APPLICATION

The development of a mobile application for the East Coast region is recommended. The application could provide prospective and current visitors with a range of detailed information about the region, including the experiences that can be undertaken.

The Group understands that currently, the East Coast region is looking at the development of a range of Wi-Fi hubs to be situated at strategic points around the region. The installation of these Wi-Fi hubs would be particularly advantageous as they could allow for the downloading of the mobile application for users who do not have cellular coverage.

In addition, we also note that Tasmanian's Visitor Information Centre's are subscribing to the mobile application, AppNGo. Whilst we do support the concept and the integration of information into the one mobile application (as opposed to have multiple mobile phone apps to manage), it is important for the East Coast, that the AppNGo application model allows the following:

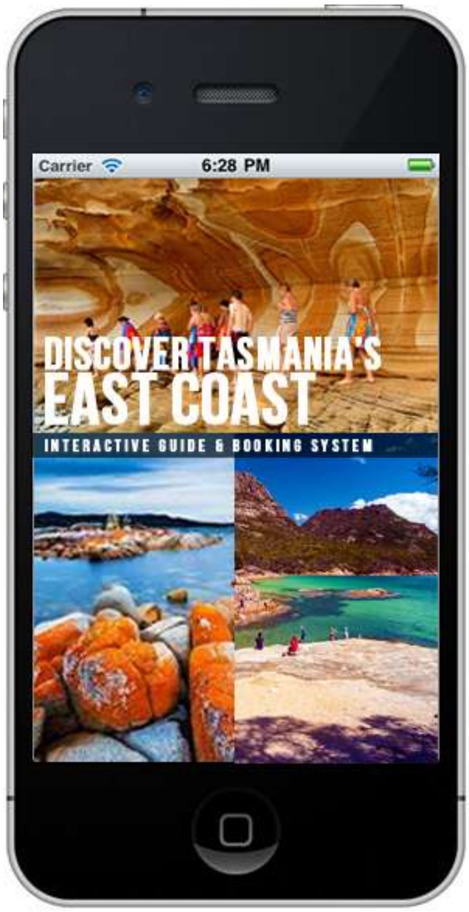
- Complete customisation of the application interface to match the look and feel that the East Coast is trying to promote and enabling the application interface to be updated once the branding for the region is developed;
- Custom itineraries for the East Coast to be added which provide the user with an interactive, self-guided tour throughout the region;
- The booking of accommodation, attractions and tours etc. over the application;
- The back-end database for the application, which stores all attraction, accommodation and related data to be readily updated when required.

If the abovementioned is able to be completed via the AppNGo model, we would recommend that ECRTO look to enhance this app, rather than creating a new additional app. If however it is not able to be achieved via the AppNGo model, we would recommend that ECRTO investigate the development of a standalone mobile phone app or website that is compatible across smartphone devices.

The following figure provides an example of what the app could potentially look like. The application could potentially allow for the booking of tours, activities and experiences as well as a range of experience packages.

For apps to be user friendly, they must be fast and efficient. As the cost of developing apps has dramatically reduced, potential could exist for sponsors to fund any enhancements needed to either the AppNGo application, or if need be, a stand along app for the East Coast.

FIGURE 37: MOCK UP OF APP FOR THE EAST COAST



In order to provide visitors (particularly children) with an exciting and engaging experience, the application could also provide interactive tours for certain trekking and cycling trials, through either:

- GPS tracking (also known as location based suggestions) - As visitors reach certain points along the walking trails, information, facts, pictures and videos can be displayed, allowing visitors to have an engaging and informative experience; or
- Manual "turn by turn" tracking - As visitors reach certain points along the trails, they are able to select next and it displays the relevant information. This would allow visitors to utilise the app even if they do not have mobile or Wi-Fi coverage.

The primary benefit of a digital tour is the ability to readily update information, something which is limited when information is placed on physical sign boards. Often, location based suggestions inform individuals of attractions, events and facilities that they may not have noticed otherwise and can play an important role in extending visitor length of stay, stimulating higher visitor spend as well as enhancing the quality of the overall experience.

Developing an application for the East Coast region would provide the following benefits:

- The application has the potential to provide users with soft copies of brochures and maps, reducing Council's and operator's reliance on expensive brochures which can be costly to print, update and to display;
- The mobile application will provide visitors with information on demand, 24 hours a day;
- Mobile applications have reached a level of sophistication which not only enable information consumption but also allow for the planning and booking of choices. Utilisation of mobile devices and the consumption of information via mobile applications is a rapidly increasing trend. As such more and more businesses are utilising them as important marketing and transaction facilitation tools.

To help finance the cost of the mobile application, advertising and add on pay-for elements could be included. These will help generate an additional income stream as well as fund the costs associated with the development of an application.

We see the development of an app as an important initiative as several other regions/destinations in Tasmania have developed and released similar apps. Increasingly, visitor markets are expecting information on demand. The following illustrates apps which have been developed from regions/destinations within Tasmania:

FIGURE 38: APPS FROM TASMANIAN DESTINATIONS/ATTRACTIONS – LAUNCESTON, TAMAR AND NORTH

FIGURE 39: APPS FROM TASMANIAN DESTINATIONS/ATTRACTIONS – THE HUON TRAIL

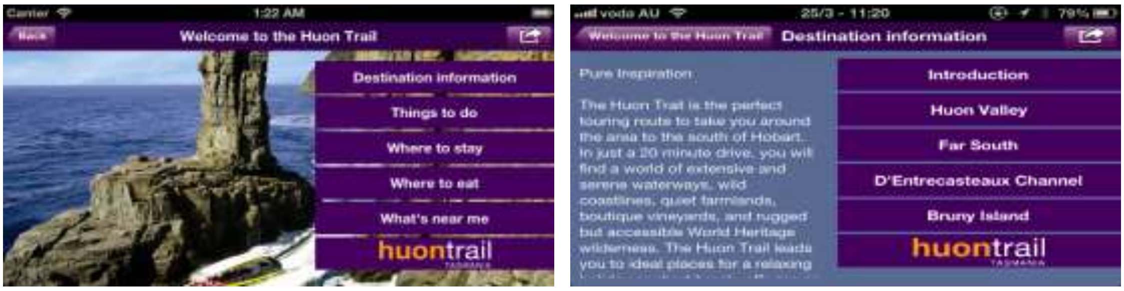


FIGURE 40: APPS FROM TASMANIAN DESTINATIONS/ATTRACTIONS – HERITAGE HIGHWAY

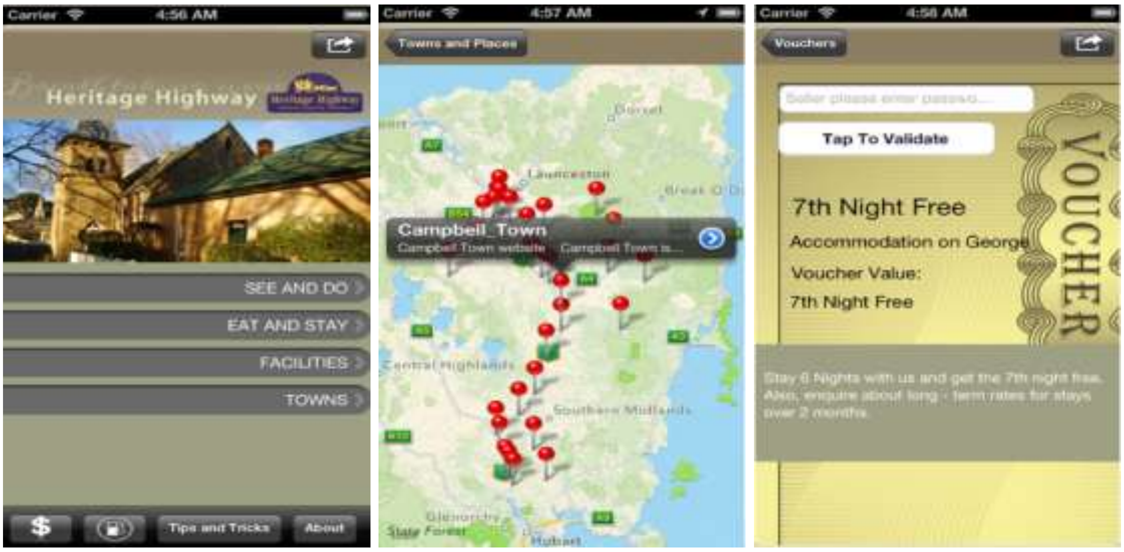
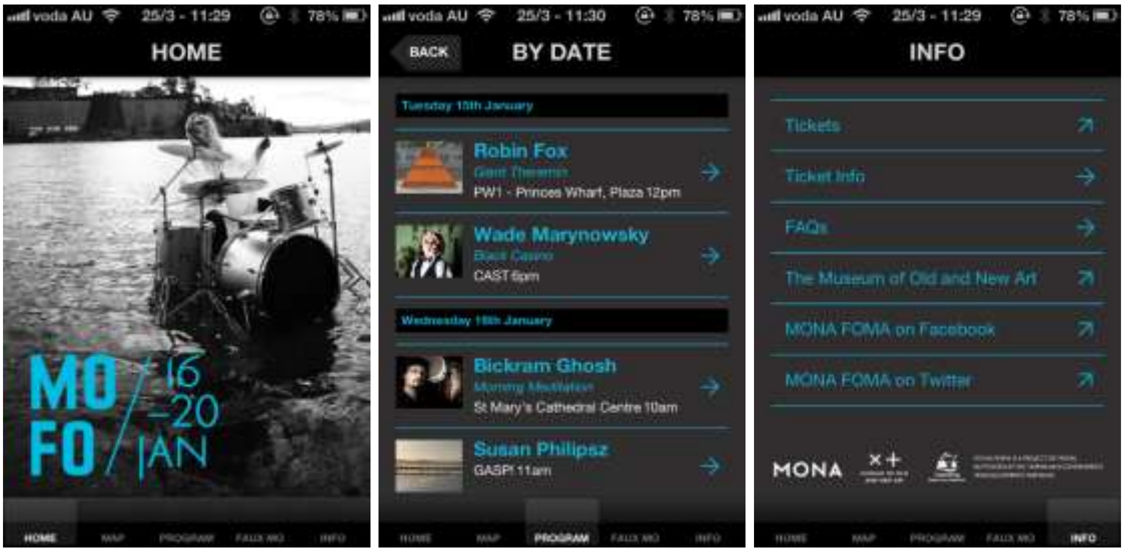


FIGURE 41: APPS FROM TASMANIAN DESTINATIONS/ATTRACTIONS – MONA



6.3. CLUSTERING/PACKAGING OF EXPERIENCES

There are a number of visitor attractions and experiences available throughout the East Coast region. To maximise the potential of attractions generally, connections between these attractions need to be developed so that they offer a composite visitor experience whilst also helping support interest in longer visitor stays in the East Coast region.

Additionally, clustering experiences and attractions together with accommodation and dining options will help promote and showcase what the East Coast has to offer, with packages created that can specifically cater for the region's targeted visitor markets.

Whilst some industry feedback indicates a struggle in achieving clustered product packages, it needs to be pushed to offer easier packages for the consumer to link to. Whether it is packages centred round fishing, bird watching, trekking, arts trails, cooking schools etc. having these connected to great accommodation offers and also food and beverage experiences will strengthen the product offering for the region. The East Coast needs to realise it is too hard at times to find good food and beverage offerings at times in the evening[79] so packaging which can include some if not all dinner experiences will offer greater certainty.

6.4. FOOD AND HERITAGE TRAILS

There are a number of viticulture businesses which have established in the region which in time could offer a boutique food and wine trail. Successful food and wine trails have been seen to offer improved production and sale of food and wine, greater promotion of tourism, improved employment prospects and as such, the retention of people and money in rural areas.[80]

The food trail could initially run from Kate's Berry Farm (south of Swansea) and link up to Eureka Farm (south west of Scamander) and then proceed onto Pyengana Dairy Farm (north of St Helens) for a dairy farm/cheese experience.

6.5. COOKING SCHOOLS

Potential exists to introduce an integrated gourmet cooking school programs, helping to grow the perception that the East Coast is an emerging boutique food region.

[79] Some restaurants and cafes are highly seasonal and others shut early
[80] Critical Factors in the Development and Performance of Food and Wine Trails in Australia

The cooking schools could also act as a showcase for the unique products that the east Coast produces. Participants could learn how to cook with the produce, enjoy their meal and purchase any of the produce they used throughout their class.

There is also the opportunity to market specially designed classes to children visiting with families and run these classes at the same time as the adult classes. Children could participate in a range of specially designed cooking and gardening classes which both stimulates and educates children regarding the importance of healthy eating and how fun cooking can be.

The educational programs could follow the produce life cycle including the cultivation and harvesting of fruits and vegetables, how this produce is prepared for use in the kitchen, the creation of meals and finally allowing the children to eat what they have made. Children's cooking classes have proven to be highly successful elsewhere, enabling children to learn, explore, experiment and discover a new passion involving good food and eating well.

6.6. FOOD FESTIVAL

One of the primary concerns regarding tourism in the East Coast is the significant impact the low season has on each businesses bottom line. In order to encourage visitation during the low and shoulder seasons, a food festival, possibly centred on seafood and other unique East Coast produce (such as products from Pyengana Dairy Company, Kate's Berry Farm and Eureka Farm) should be evolved.

As previously noted the Bicheno Food and Wine Festival could also be expanded or other seasonal food and wine experiences offered.

6.7. GREATER PROMOTION OF FISHING EXPERIENCES

The East Coast, and St Helens in particular, is noted as a prime location for year round fishing including game fishing, deep sea fishing, river fishing and bay fishing.

The Group understands that as a result of a warmer current passing through St Helens, species are being seen in the waters which were previously only in warmer waters and subsequently, opportunities to catch larger tuna, marlin and dolphin fish are increasing.

The opportunity exists therefore to market St Helens as the sports fishing capital of Tasmania and highlight that this is available nearly all year round.

6.8. PET FRIENDLY EAST COAST

Positioning the East Coast as a pet friendly region for visitors could provide the region with a unique selling point and present an excellent opportunity for stimulating tourism, particularly because pet tourism is a relatively new concept and has not been adopted by a large number of destinations yet. Whilst the East Coast does have a number of national parks and reserve areas where pets (dogs) cannot be taken, the region does have many other recreational areas which pet owners can take their dogs. For those wishing to visit a national park an opportunity exists to create a dog minding service whilst the owners go into national parks etc. This of course could extend into a variety of other pet friendly services including pet health checks, grooming, purchase of pet merchandise etc.

Pet tourism is seen as an increasingly important tourism sector for the following reasons:

- Australia has one of the highest pet ownership levels in the world, with an estimated 40% of households having at least one dog[81];
- The baby boomer generation is said to spend the largest proportion of their discretionary income on two sectors, those being entertainment and pets[82]; and
- Global studies have found that despite the recession, individuals are still spending significant amounts on their animals.[83]

The opportunity exists to position the East Coast as a pet friendly destination for the increasing number of visitors who choose to holiday with their pets. To do so, the following needs to be considered:

- The development of new or the conversion of selected existing accommodation to pet-friendly accommodation. This does not mean the entire motel/hotel needs to be dedicated to animals, but rather a designated number of rooms could offer facilities for owners and their accompanying pets;
- The development of a marketing campaign which actively encourages pet owners to visit with their pets; and
- To encourage a number of operators to incorporate pet-friendly accommodation options into their current product, operators need to be aware of the potential benefits which could be gained.

Research indicates that although there is demand for pet tourism in Australia, insufficient numbers of operators are happy to take up pet tourism because they are unaware of the potential benefits. The

[81] Australian Companion Animal Council Inc. - http://www.acac.org.au/

[82] Boomers, pet owners called future of tourism - http://www.postandcourier.com/news/2011/mar/07/state-reportboomers-pet-owners-called-future-of/

[83] Pet tourism – it's where you fetch the dog's slippers - http://rac.com.au/About-Us/RAC-eNews/August-2011/Pet-tourism.aspx

promotion of the economic benefits of pet tourism to East Coast accommodation providers would need to be undertaken first.

6.9. SERIES OF COASTAL WALKS/CYCLE TOURS WITH PACKAGES

The opportunity exists to create a series of coastal walkways and cycle ways right along the East Coast and encouraging packages of 2 - 3 nights or longer whilst staying in suitable accommodation in various towns (St Helens, Scamander, Bicheno, Swansea, Coles Bay, Triabunna and Orford).

The development of a range of walking and cycling trails along the coast could stimulate increased visitation and could help position the East Coast as a unique coastal trekking destination.

Whilst we acknowledge the challenge of encouraging anything other than very basic tent camp experiences within national parks and reserves, there is an opportunity to link in with existing accommodation operators who reside along the coast and utilising them as part of the overnight trekking experience. Not only would this allow for a range of differently priced walks (for commercial tour operators), but this would also allow for a much easier experience as food need not be carried.

To help stimulate employment and other economic benefits, we would encourage that the coastal walkways/cycle ways be linked to commercial accommodation and be commissionable product rather than necessarily free. It is important that industry operators benefit from a longer season and hence any coastal walkway/cycleway development should strongly encourage and promote this as a packaged product with accommodation and meals.

Whilst free walkers cannot be discouraged every effort should be made to use the walkway as a mechanism for encouraging greater use of commercial accommodation en-route and the use of cafes and restaurants.

6.10. GOLF TRAILS

The opportunity exists to potentially develop a golf circuit, utilising existing golf courses throughout the region, and integrating new courses once developed (such as the Greg Norman course at Orford).

The following map illustrates the location of each of the region’s 7 existing golf courses, as well as the proposed Solis golf course at Orford. There is also a proposal to double the Bicheno golf course to 18 holes including beach front holiday home accommodation.

Potential exists to link these courses together by liaising with golf course managers and accommodation providers to organise packages which golfers can undertake.

FIGURE 42: LOCATION OF EAST COAST GOLF COURSES/CLUBS

6.11. HIGH QUALITY ECO ACCOMMODATION IN NATIONAL PARKS

The opportunity may exist to develop a range of small, high quality eco-accommodation clusters in some of the national parks across the East Coast region. The development should not be on a large scale and should directly complement and enhance the values of Parks and Wildlife and the elements of the surrounding natural environment. Figure 43 below provides an example of best practice eco-accommodation which was designed to integrate into the surrounding environment.

This may offer Parks and Wildlife a new attractive revenue stream, either through a concession lease arrangement with an operator, or if Parks and Wildlife foresaw themselves in operating such facilities.

FIGURE 43: BEST PRACTICE ECO-STYLE ACCOMMODATION[84]

With the introduction of eco-accommodation, the potential could then exist to expand the experiences individuals could undertake in the national parks, through the introduction of multi-day experience packages (noting that this does exist on Maria Island currently).

6.12. REVIEW OF VISITOR INFORMATION SERVICES

The East Coast has four official visitor information network centres scattered around the region. Figure 44 provides an overview of the VIC locations.

From work The Group has undertaken on visitor information centres in numerous locations (Cradle Coast, Byron Bay, Cooma-Monaro, Sunshine Coast, and Launceston), we understand that Council's in particular, are looking for more effective and cost-efficient ways to deliver information to visitors. In most cases, VICs have significant net costs of services and utilisation of VICs nationally, is trending down.

In order to ensure the VICs across the East Coast are operating to their most effective capacity, The Group recommends that a VIC review be undertaken by Break O'Day Council and Glamorgan Spring Bay Council supported by ECRTO and the local tourism organisations.

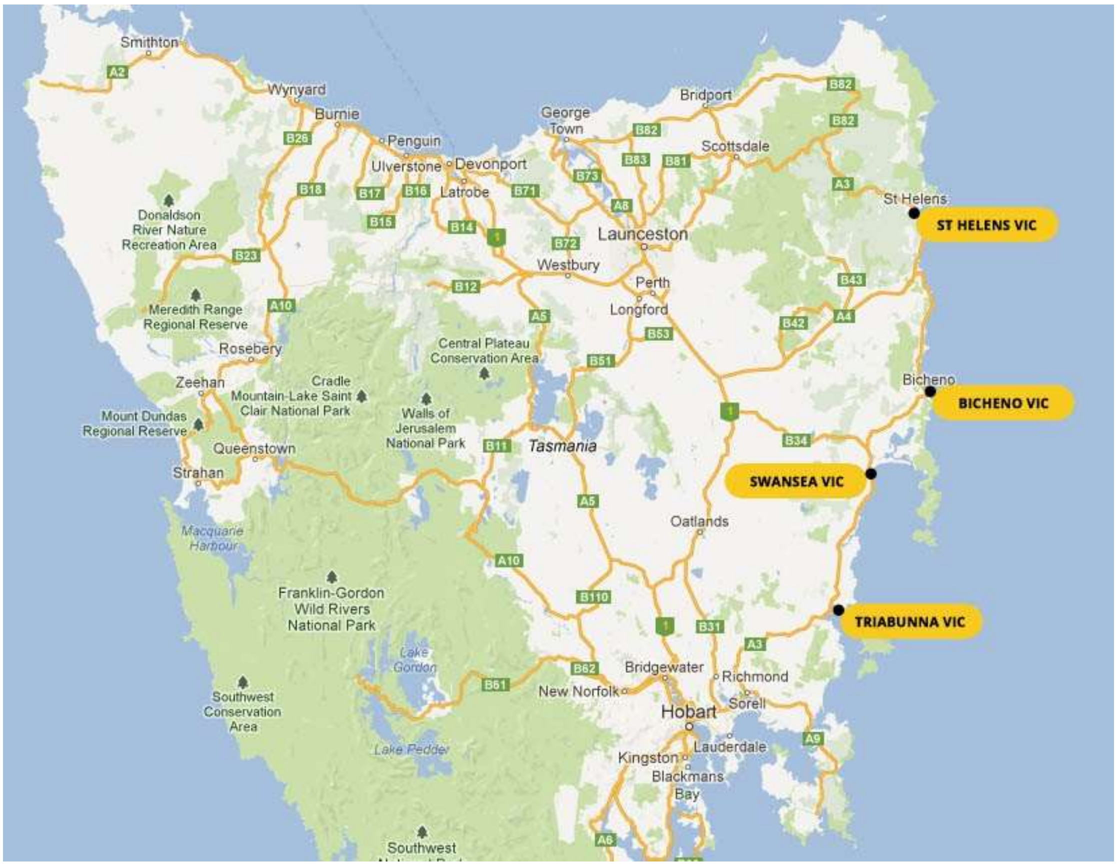
The review should look at:

- Identifying opportunities to increase efficiencies for those responsible for the delivery of visitor information services;
- To increase the effectiveness of those visitor services delivered within the region;
- To confirm the roles and responsibilities for those involved in the provision of visitor information services;

[84] South Coast, NSW Australia and Gold Coast, Queensland Australia

- To highlight technology solutions which may provide alternative and broader access to information; and
- To identify opportunities for developing a greater shared approach to the delivery of visitor information services throughout the East Coast region.

FIGURE 44: VIC LOCATIONS



6.13. LINK TO NATIONAL LANDSCAPES

This DMP plays a pivotal role in informing and offering product for the National Landscapes Experience Development Strategy. The East Coast is part of the National Landscape destination with the potential to expand beyond existing high profile national parks such as Freycinet and for developing other important national parks and conservation areas within the region such as Blue Tier, Bay of Fires, Maria Island etc.

7. MARKETING AND BRANDING

7.1. TOURISM TASMANIA – EAST COAST BRANDING

We note that currently, Tourism Tasmania is undertaking a branding exercise in tandem with each RTO for each of the tourism regions in Tasmania. As we understand it, the purpose of this exercise is to develop a new brand, identity and tagline for each of the regions. So far, a branding workshop has been held with a range of stakeholders based in the East Coast to identify brand values, triggers and to develop the brand story. Appendix 1 contains a summary of key slides from this workshop.

As no other work has been released yet regarding the branding for the region, The Group is unable to make further comment on the brand and its values for the region. We understand that the brand and tag line are to be developed over the next 2 – 3 months and will need to be included as an addendum to this DMP once agreed and completed.

7.2. KEY VISITOR MARKETS TO FOCUS ON/MARKET OPPORTUNITIES

The table on the following page provides a summary of key visitor markets which should be focused on when implementing recommendations suggested in this DMP. The table outlines the visitor markets, their typical characteristics and what product/promotional campaigns could be undertaken to appeal to the market. It has to be assumed that the overall regional brand and associated tag lines and imagery will fit well with these visitor markets identified.

The following target markets have been identified:

- Shackies (own holiday house)
- Short-break market ex Melbourne, Sydney and Brisbane especially
- Day trip visitors ex Hobart and Launceston
- Food event attendees
- Nature based visitors (wildlife viewers)
- Car clubs and bike clubs
- Fishing market (all year round and linked to competition and events)
- Bird watchers
- Art and cultural event attendees
- Conference tag on tours ex Hobart
- Chinese market (group tours and free independent travellers including students studying in Tasmania.

TABLE 13: KEY VISITOR MARKETS TO FOCUS ON/MARKET OPPORTUNITIES

VISITOR MARKETS AND STRATEGIES TO FOCUS ON					
Market	Visitor Segment			Market features	Product/Marketing to Target
	Intrastate	Interstate	International		
Shackies (own holiday house)	✓	-	-	▪ Family and couple market ▪ Medium-higher socio economic market	▪ Food trails and events ▪ Experiences such as sea kayaking, hiking, quad biking
Short-break market	✓	✓	-	▪ Family and couple market ▪ Strong potential markets ex Sydney, Melbourne and Brisbane	▪ Packaged experiences, incorporating the food trail, cooking schools, accommodation and other recreational experiences ▪ Golf trails, packaged with accommodation and flights
Day trip visitors	✓	✓	✓	▪ Day trip visitors ex Hobart and Launceston whose main purpose of trip may not have been to visit the East Coast but may have been encouraged to undertake a day trip after seeing promotional material/word of mouth etc.	▪ Fishing experience at St Helens ▪ Coastal walks/cycle ways with rental bikes visitors can hire ▪ Day trip food trail experiences, including self-guided and guided experiences ▪ Cooking school day trip packages
Food event attendees	✓	✓	-	▪ Broad socio-economic market ▪ Primarily couple related, slightly more skewed towards women ▪ Strong market ex-Hobart and other major regional towns in Tasmania as well as interstate, particular Melbourne, Sydney and Brisbane ▪ Market likes to sample new cuisine, increase their cultural knowledge, to experience local customs and cultures, enjoy special feature events and to meet people from around the world	▪ Develop 1 or 2 signature events to promote the produce which is created in the region, particularly focusing on value-added produce ▪ Packaged experiences, incorporating the food trail, cooking schools, accommodation with food event tickets
Fishing market	✓	✓	✓	▪ Broad socio-economic ▪ Primarily male ▪ Strong focus on weekends and holiday as well as fishing competitions ▪ Currently primarily intrastate but potential to grow interstate	▪ Fishing centre at St Helens and integrated fishing experiences, including guided fishing packages, independent fishing and fishing competitions ▪ Continued promotion of fishing events in St Helens

VISITOR MARKETS AND STRATEGIES TO FOCUS ON					
Market	**Visitor Segment**			**Market features**	**Product/Marketing to Target**
	Intrastate	Interstate	International		
Nature based visitors	✓	✓	✓	Nature based visitors are those who seek to experience natural places, which can range from passive to active experiences. Nature based visitors participate in: ▪ Bushwalking/rainforest walks ▪ National parks visitation ▪ Whale/dolphin/other nature watching ▪ Farm visits ▪ Beach trips Nature based experiences are linked to all other aspects of the visitor's total experience of a destination such as food, culture, relaxation, health, family needs, accommodation, transport etc. all of these elements complement each other and together form the basis of a visitor's overall satisfaction with their trip.	▪ Fishing centres and experiences which are offered, including game fishing, scuba diving etc. ▪ Packaging of thrill/nature based experiences throughout the region, including sea kayaking, boating and quad biking experiences based in Coles Bay ▪ Promotion of cycling/walking trails, possibly linking in with high quality eco-accommodation if developed in one of the national parks ▪ Package wildlife experience tours such as the penguin tours in Bicheno
Car clubs and bike clubs	✓	✓	-	▪ Includes those visitors who have a keen interest in cars/bikes (restoration, new vehicles, car shows, race meets, general driving etc.). ▪ Broad socio-economic ▪ Primarily male ▪ Will spend significantly on the right product	▪ Promotion of the region's best driving roads/highways which we understand are ideal for motor bike riding ▪ Development of classic car exhibition in St Mary's
Bird watchers	-	✓	✓	▪ Generally an over 50's market ▪ Male and female ▪ Generally higher socio-economic market	▪ Coastal walks/cycle ways with rental bikes visitors can hire ▪ Guided bird watching tours ▪ Promotion to bird watching clubs around Australia
Art and cultural event attendees	✓	✓	✓	▪ Generally higher socio-economic market ▪ Large market ex-Sydney, Melbourne	▪ Link in and package with Mona and QVMAG ▪ NSW Art Gallery, GOMA and QLD Art Gallery, National Gallery of Australia Canberra

VISITOR MARKETS AND STRATEGIES TO FOCUS ON					
Market	**Visitor Segment**			**Market features**	**Product/Marketing to Target**
	Intrastate	Interstate	International		
Conference tag on tours ex Hobart and Launceston	✓	✓	✓	▪ Male and female ▪ Generally higher socio-economic market and characterised by higher spend levels ▪ Covers intrastate, interstate and international	▪ Packaged experiences incorporating transport, accommodation and food. Including passive recreational and nature based experiences ▪ High quality eco-accommodation to provide visitors with an authentic nature based experience ▪ Package wildlife experience tours such as the penguin tours in Bicheno
Chinese market	-	-	✓	▪ The fastest growing international visitor market to Tasmania ▪ Expectation for good retail trading hours ▪ Travel primarily via organised tours ▪ 4 key segments within the Asian market: – Group travellers – less experienced, little to no English, travels in groups of up to 20 people, packaged travel, highly price sensitive – Assisted Travellers – affluent, university educated couples, experienced travellers, seek to explore local culture, interest in golf, self-drive, food and wine and resorts – Youth travellers – primarily education visitors, young demographic – Business event travellers – visiting major cities for events, potential to attract packaged add-on tours	▪ Packaged experiences incorporating transport, accommodation and food. Including passive recreational and nature based experiences ▪ Packaging and promotion of the golf trail, potentially linking in with other golf courses around Tasmania, particularly those of national significance (Barnbougle) ▪ Promotion of the importance of tourism to the region, and the need to establish a retail-roster to extend retail operating hours ▪ High quality eco-accommodation to provide visitors with an authentic nature based experience ▪ Dining experiences with seafood focus

7.3. PROMOTIONAL AND COMMUNICATION CHANNELS

7.3.1. WEBSITES

The East Coast has a number of websites dedicated to providing information on the region and its offerings. These include:

ECRTO website	VIC Network website	Tourism Tasmania
We note that ECRTO recently developed and released this brand new website which promotes the RTO and the region in general (pictured below).	Website provides information on the 4 VICs in the East Coast region, as well as accommodation, attractions and tours booking information.	Website provides a summary of the region, along with a brief overview about what to visit, two itineraries visitors can follow as well as VIC contact information (only for St Helens and Triabunna, does not include contact details for Bicheno or Swansea).

Although the ECRTO website is relatively new, it is important that it's SEO (search engine optimisation) is improved to ensure that when visitors enter search terms into a search engine, such as "visit the East Coast of Tasmania", the first website returned is the ECRTO website. Currently, whilst the VIC Network website and Tourism Tasmania's website are produced as results, ECRTO's website does not appear as the priority web site..

7.3.2. DESTINATION GUIDE

The East Coast destination guide is a 36 page booklet which features information on the Tasmanian East Coast, including Flinders Island. The destination guide is available online (through the Tourism Tasmania website, as well as in hard copy format at the region's visitor centres).

The guide covers a range of information including:

- An overview of useful information such as emergency contacts, mobile phone coverage, national parks information etc.;
- Travel times;
- Events and festivals held in the region;
- A map of the region;
- An overview of the following towns: Orford and Triabunna; Swansea; Coles Bay; Bicheno; Four Mile Creek, Scamander and St Marys; St Helens and Bay of Fires; North East Hinterland; and Flinders Island; and
- Accommodation information in each of the towns.

FIGURE 45: EAST COAST DESTINATION GUIDE[85]

[85] We understand that this current destination guide is now out of print.

7.4. FUTURE MARKETS AND COMMUNICATION CHANNELS

TABLE 14: FUTURE PROMOTIONAL AND COMMUNICATION CHANNELS

FUTURE PROMOTIONAL AND COMMUNICATION CHANNELS		
Market	**Product to Capture Market**	**Communication channels to capture market**
Shackies (own holiday house)	▪ Food festival/event ▪ Food trail ▪ Wine trails	▪ Advertise in food and wine magazines as well as food and wine websites Billboard advertising 2-3 months prior to event. ▪ Promotion of packages bundling food and wine experiences together
Short-break market	▪ Eco-accommodation in national parks ▪ Packaged product ▪ Guided and self-guided walking tours ▪ Sports fishing centre ▪ Cooking schools ▪ Food festival/event ▪ Food trail ▪ Wine trail	▪ Setup own website for accommodation as well as advertising on Parks and Wildlife website, ECRTO website and external travel sites such as Expedia, Wotif. ▪ Promote packages on ECRTO website and on other websites such as Expedia ▪ Promote on ECRTO website ▪ Media launch for when centre opens up and promote on ECRTO website ▪ Promote on ECRTO website and Tourism Tasmania website ▪ Advertise in food and wine magazines as well as food and wine websites. Billboard advertising 2-3 months prior to event. ▪ Promotion of packages featuring food and wine experiences bundled with accommodation and other experiences
Day trip visitors	▪ Guided and self-guided walking tours ▪ Sports fishing centre ▪ Cooking school ▪ Food festival/event ▪ Food trail ▪ Wine trail	▪ Promote on ECRTO website ▪ Media launch for when centre opens up and promote on ECRTO website ▪ Promote on ECRTO website and Tourism Tasmania website ▪ Advertise in food and wine magazines as well as food and wine websites Billboard advertising 2-3 months prior to event. ▪ Promotion of packages bundling food and wine experiences together
Food event attendees	▪ Cooking schools ▪ Food festival/event ▪ Food trail ▪ Wine trail	▪ Promote on ECRTO website and Tourism Tasmania website and relevant food events held around Tasmania ▪ Advertise in food and wine magazines as well as food and wine websites Billboard advertising 2-3 months prior to event. ▪ Promotion of packages featuring food and wine experiences bundled with accommodation and other experiences
Nature based visitors	▪ Walking and cycling trails	▪ Advertise on ECRTO website, Parks and Wildlife and Tourism Tasmania websites.

FUTURE PROMOTIONAL AND COMMUNICATION CHANNELS		
Market	**Product to Capture Market**	**Communication channels to capture market**
	▪ Eco-accommodation in national parks ▪ Guided walking tours	▪ Setup own website for accommodation as well as advertising on Parks and Wildlife website, ECRTO website and external travel sites such as Expedia, Wotif. ▪ Setup website for guided walking tours and link to ECRTO website
Car clubs and bike clubs	▪ Packaged events ideally focused on the East Coast	▪ Via car club and bike club websites, newsletters etc. ▪ Via car club event promoters
Fishing market	▪ Guided and unguided fishing experiences ▪ Game fishing centre and associated activities	▪ Promotion of year round fishing experience available in the East Coast on fishing websites and fishing magazines. Liaise with fishing clubs around Australia to setup fishing meets and competitions. ▪ Media launch for when centre opens up and promote on ECRTO website
Bird watchers	▪ Walking trails, particularly those around wetland areas and through national parks	▪ Advertise on ECRTO website, Parks and Wildlife and Tourism Tasmania websites.
Art and cultural event attendees	▪ Food and wine trails ▪ Guided walking tours	▪ Promotion of packages featuring food and wine experiences bundled with accommodation and other experiences on ECRTO website as well as promotional displays at relevant events
Conference tag on tours ex Hobart	▪ Packaged product ▪ Food and wine trails	▪ Promotion of packages featuring food and wine experiences bundled with accommodation and other experiences on ECRTO website as well as promotional displays at relevant events
Chinese market	▪ Golf trails and tours ▪ Food and wine trails ▪ Guided walking tours	▪ Liaise with Chinese Tour operators to include relevant packages in their product offering for Chinese tourists

8. ROLES AND RESPONSIBILITIES

The following matrix provides a summary of the tourism related roles and responsibilities of the main tourism related stakeholders which are required to support this DMP for the East Coast.

Each stakeholder entity or group has a role to play in bringing about visitor growth, higher yield and length of stay in the East Coast. Regional activities will be the responsibility of ECRTO whilst the councils and local industry operators need to work in tandem to strengthen the East Coast tourism proposition.

To deliver the outcomes, a collaborative approach is needed with true partnerships being formed.

TABLE 15: ROLES AND RESPONSIBILITIES

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	**ECRTO**	**Break O'Day Council**	**Glamorgan Spring Bay Council**	**Tourism Tasmania**	**Parks and Wildlife Service**	**Developers and Investors**	**Industry Operators**	**St Helens Chamber of Commerce**	**Greater Esk Tourism (St Marys)**	**Bicheno Community Development Association**	**Freycinet Association Inc.**	**Swansea Chamber of Commerce**	**Triabunna/ Orford Chamber of Commerce**
Food and heritage trails	Coordination and development role	Market trails	Market trails	Input product info and market trails	-	-	Input product info and market trails	Input product info and market trails	Input product info and market trails	Input product info and market trails	Input product info and market trails	Input product info and market trails	Input product info and market trails
Cooking Schools	Coordination and marketing role			Market schools once developed	-	Development role	Market schools once developed	Market schools once developed	Market schools once developed	Market schools once developed	Market schools once developed	Market schools once developed	Market schools once developed
Development of food based event/festival	Coordination role	Assist with event planning	Assist with event planning	Marketing role	-	-	Participation in event	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role
Coastal walks/cycle ways with packages	Facilitate planning study	Assist with planning study	Assist with planning study	Assist with planning study	Assist with planning where tracks enter National Parks/Reserves	-	Tour operators to help assist in package creation	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed
High quality eco-accommodation in national parks	Liaise with Parks and Wildlife	-	-	Provide assistance where needed	Undertake feasibility study	Development role	-	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed	Marketing role once developed
Resolution of free camping issue	Liaise with Parks and Wildlife	Provide assistance where needed	Provide assistance where needed	Provide assistance where needed	Identify and implement solutions	-	-	Provide assistance where needed	Provide assistance where needed	Provide assistance where needed	Provide assistance where needed	Provide assistance where needed	Provide assistance where needed
Investigate day trip photography 'hunting' tours	Undertake liaison with tour operators	-	-	-	-	-	Tour operators - participate in liaison	-	-	-	-	-	-

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	**ECRTO**	**Break O'Day Council**	**Glamorgan Spring Bay Council**	**Tourism Tasmania**	**Parks and Wildlife Service**	**Developers and Investors**	**Industry Operators**	**St Helens Chamber of Commerce**	**Greater Esk Tourism (St Marys)**	**Bicheno Community Development Association**	**Freycinet Association Inc.**	**Swansea Chamber of Commerce**	**Triabunna/ Orford Chamber of Commerce**
Encourage schools to undertake field trips to the East Coast	Coordination and marketing role - creation of marketing material	Provide info on region	Provide info on region	Provide info on region	Provide info on National Parks and forest reserves etc.	-	-	-	-	-	-	-	-
Position the East Coast as a location for visitors travelling with pets	Coordination and marketing role	Marketing role	Marketing role	Marketing role	-	-	Accommodation providers to become pet-friendly certified	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role
Promotion of Buckland walking tours	Liaise with Brockley Estate & develop promotional strategy	-	Marketing role	-	-	-	Brockley Estate to liaise with ECRTO	-	-	-	-	-	Promotional role
Development of golfing trails	Facilitate planning study to develop trail	Marketing role	Marketing role	Marketing role	-	-	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role	Promotional role
Assessment of facilities for motor home	Provide assistance	Undertake assessment	Undertake assessment	Provide input	Provide assistance	-	-	-	-	-	-	-	-
Southern Gateway Signage	Develop as part of overall signage strategy for the region	-	Assistance with signage strategy and DIER submission	Assistance with signage strategy and DIER submission	-	-	Offer letters of support	Offer letters of support	Offer letters of support	Offer letters of support	Offer letters of support	Offer letters of support	Offer letters of support

ROLES AND RESPONSIBILITIES

Key Stakeholder Roles	ECRTO	Break O'Day Council	Glamorgan Spring Bay Council	Tourism Tasmania	Parks and Wildlife Service	Developers and Investors	Industry Operators	St Helens Chamber of Commerce	Greater Esk Tourism (St Marys)	Bicheno Community Development Association	Freycinet Association Inc.	Swansea Chamber of Commerce	Triabunna/ Orford Chamber of Commerce
Solis site assessment	Undertake discussions with developer	-	Assistance with discussion and liaison where required	-	-	Site developer to participate in discussions with ECRTO.	-	-	-	-	-	-	-
Staging post to Maria Island	-	-	Reassess role	-	Determine future needs	-	-	-	-	-	-	-	Marketing role
Expanded retail facilities at Triabunna	-	Ongoing assessment	Ongoing assessment	-	-	-	Provide input	-	-	-	-	-	Provide input
Expanded marina development	Provide input	-	Lead role		Provide input	Investor	Provide input and support	-	-	-	-	-	Marketing role
Wetland areas walking track at Swansea	Facilitate demand study	-	Assistance with demand study	Assistance with demand study	-	-	-	-	-	-	-	Marketing role	-
Small winery trail from Swansea	Liaise with wineries, develop marketing demand study and implement	-	Promotional role once trail is developed	Promotional role once trail is developed	-	-	Wineries to liaise and participate in marketing demand study	-	-	-	-	Marketing role	-
Feasibility study for Wine Interpretation Centre	Facilitate feasibility study and liaise with potential locations	-	Assess and support DA	Promotional role if Centre is developed	-	Development or fitout of Centre if developed as commercial development	Participate in discussions	-	-	-	-	Marketing role	-

ROLES AND RESPONSIBILITIES

Key Stakeholder Roles	ECRTO	Break O'Day Council	Glamorgan Spring Bay Council	Tourism Tasmania	Parks and Wildlife Service	Developers and Investors	Industry Operators	St Helens Chamber of Commerce	Greater Esk Tourism (St Marys)	Bicheno Community Development Association	Freycinet Association Inc.	Swansea Chamber of Commerce	Triabunna/ Orford Chamber of Commerce
Greater Oyster Bay foot bridge/cycle way	Facilitate feasibility study and present to Council	-	Review feasibility and progress if positive	Promotional role if bridge/walk is developed	Promotional role if bridge/walk is developed	-	Actively support	-	-	-	Marketing role	Marketing role	-
Leverage off profile of Wine Glass Bay and Freycinet National Park	Ongoing regional marketing role	-	Actively support	Use of collateral in campaigns	Partner in promotions	-	-	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role	Marketing role
Strengthen link between food and beverage experiences and accommodation	Develop strategy and packages to better link experiences	-	-	-	-	-	Provide info on product available	-	-	-	Provide relevant info on food/bev and accommodation providers & marketing role	-	-
Greater promotion of Bicheno wildlife tours and natural attraction	Ongoing regional marketing role	-	-	Promotional Role	-	-	Actively support	-	-	Marketing role and provide info where needed	-	-	-
Classic car display at St Marys	Liaison and coordination role	-	-	Promotional Role	-	-	Actively support	-	Promotion role	-	-	-	-
Archaeological dig trail at St Marys	Facilitate feasibility study	Planning and marketing role	-	Promotional Role if developed	-	-	Actively support	-	Promotion role	-	-	-	-

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	**ECRTO**	**Break O'Day Council**	**Glamorgan Spring Bay Council**	**Tourism Tasmania**	**Parks and Wildlife Service**	**Developers and Investors**	**Industry Operators**	**St Helens Chamber of Commerce**	**Greater Esk Tourism (St Marys)**	**Bicheno Community Development Association**	**Freycinet Association Inc.**	**Swansea Chamber of Commerce**	**Triabunna/ Orford Chamber of Commerce**
Enhance the main street of St Marys	Encourage Council to undertake feasibility and determine possible grants	Assess current plans and develop feasibility study	-	-	-	-	Actively support	-	Provide info where needed and push for main street enhancements	-	-	-	-
Raise the standard of larger accommodation properties on the East Coast	Liaison with accom operators to determine cost benefit of refurbishment	Provide input where required	Provide input where required	Provide assistance	-	-	Large accom. operators to undertake feasibilities	Encourage operators to undertake refurb/ product enhancement	Encourage operators to undertake refurb/ product enhancement	Encourage operators to undertake refurb /product enhancement	Encourage operators to undertake refurb/ product enhancement	Encourage operators to undertake refurb/ product enhancement	Encourage operators to undertake refurb/ product enhancement
Waterfront development at St Helens	Encourage feasibility study for waterfront development, including development of fishing interp centre	Assist with prefeasibility study	-	Provide grant information and promotional role if developed	-	Development of Waterfront if privately developed	Actively support	Promotional role	-	-	-	-	-
Greater promotion of fishing in the East Coast and position St Helens as sports fishing capital of Tasmania	Develop promotional strategy and implement initiatives with council and industry	Promotional role	-	Promotional role	Promotional role	-	Fishing tour operators to participate in promotional strategy development	Marketing role	-	-	-	-	-

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	**ECRTO**	**Break O'Day Council**	**Glamorgan Spring Bay Council**	**Tourism Tasmania**	**Parks and Wildlife Service**	**Developers and Investors**	**Industry Operators**	**St Helens Chamber of Commerce**	**Greater Esk Tourism (St Marys)**	**Bicheno Community Development Association**	**Freycinet Association Inc.**	**Swansea Chamber of Commerce**	**Triabunna/ Orford Chamber of Commerce**
St Helens Visitor centre location	Encourage Council to undertake location assessment	Undertake location assessment	-	-	-	-	Provide input	Industry liaison role	-	-	-	-	-
Improve signage for natural attractors in and around St Helens	Integrate as part of overall signage strategy	Assistance with signage strategy and DIER submission	-	Assistance with signage strategy and DIER submission	-	-	Provide input	-	-	-	-	-	-
Visitor services strategy for the region	Commission development of strategy	Provide info on VIC where required	Provide info on VIC where required	Provide info on VIC where required	-	-	-	Provide info where required	Provide info where required	Provide info where required	Provide info where required	Provide info where required	Provide info where required
Tourism awareness program	Develop program	Partner on program	Partner on program	Partner on program	-	-	Participate in program	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role
Interpretative and Directional Signage Strategy	Develop and implement signage strategy	Assistance with signage strategy and DIER submission	Assistance with signage strategy and DIER submission	Assistance with signage strategy and DIER submission	Assistance with signage strategy and DIER submission	-	Provide input	Assistance with strategy implementation	Assistance with strategy implementation	Assistance with strategy implementation	Assistance with strategy implementation	Assistance with strategy implementation	Assistance with strategy implementation
Encourage retail operators to stay open for longer hours	Undertake investigation of options	Assess impact	Assess impact	Support role to ECRTO	-	-	Assist with options identification	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role
Establish roster between businesses to collaborate on opening times	Industry liaison and roster template setup	Promotional role	Promotional role	Promotional role	-	-	Update and maintain roster	Update and maintain roster	Update and maintain roster	Update and maintain roster	Update and maintain roster	Update and maintain roster	Update and maintain roster

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	**ECRTO**	**Break O'Day Council**	**Glamorgan Spring Bay Council**	**Tourism Tasmania**	**Parks and Wildlife Service**	**Developers and Investors**	**Industry Operators**	**St Helens Chamber of Commerce**	**Greater Esk Tourism (St Marys)**	**Bicheno Community Development Association**	**Freycinet Association Inc.**	**Swansea Chamber of Commerce**	**Triabunna/ Orford Chamber of Commerce**
Stimulate investment into the East Coast	Setup memorandum in conjunction with both Councils	Assist with investment memo development	Assist with investment memo development	-	-	Input into memorandum	Input and advice	-	-	-	-	-	-
Mobile Phone Application – creation and maintenance	Coordination and development role	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	-	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app	Provide relevant info for integration into app
Packaging of product	Coordination and development role	Promotional role	Promotional role	Promotional role	Provide info on product and promotional role	-	Provide info on product and promotional role	Provide info on product and promotional role	Provide info on product and promotional role	Provide info on product and promotional role	Provide info on product and promotional role	Provide info on product and promotional role	Provide info on product and promotional role
Social Media Strategy	Coordination and development role	Promotional role	Promotional role	Promotional role	-	-	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role
Stimulation of visitor experience through online innovation	Coordination and development role	Promotional role	Promotional role	Promotional role	-	-	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role
Encourage stronger relationship and partnerships with Parks and Wildlife	Coordination and development role	Participate in discussions	Participate in discussions	Participate in discussions	Participate in discussions with ECRTO	-	-	-	-	-	-	-	-

ROLES AND RESPONSIBILITIES													
Key Stakeholder Roles	ECRTO	Break O'Day Council	Glamorgan Spring Bay Council	Tourism Tasmania	Parks and Wildlife Service	Developers and Investors	Industry Operators	St Helens Chamber of Commerce	Greater Esk Tourism (St Marys)	Bicheno Community Development Association	Freycinet Association Inc.	Swansea Chamber of Commerce	Triabunna/ Orford Chamber of Commerce
Boost awareness of the East Coast	Develop famil program	Provide info where required	Provide info where required	Promotional role	Promotional role	-	Provide FOC opportunities for famil program	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role	Promotional role
Undertake comparative study tour of West Coast of New Zealand	Participate in study tour	Participate in study tour	Participate in study tour	Promotional role	Promotional role	-	-	-	-	-	-	-	-

Whilst there are a number of actions and roles which ECRTO needs to take a lead role in, the other major stakeholders will also need to take far greater active roles in view of the very limited staff and related resources of ECRTO. It is estimated that to deliver the above roles and responsibilities effectively and efficiently the RTO will need to consider expanding its staff resource beyond its executive officer. Realistically the level of staffing should expand to a team of two full time and one part time staff member. Over time and subject to greater resourcing ECRTO should eventually aim to operate with a staffing level of three personnel which could correlate to:

- An executive officer focussed on market and product development;
- And administration officer – book keeper and secretarial provider to the ECRTO Board; and
- A part time technology support officer focussed on web site maintenance and online promotional program implementation.

It is equally important however to maintain an operating model where the vast bulk of funding is used for promotional campaigns and supporting strategies (ideally 65-70% of funding actually going into promotional campaigns and no more than 30-35% applied to operational overheads).

9. IMPLEMENTATION PLAN

The following are the key result areas to be focused on to help facilitate the successful implementation of this Destination Management Plan. Please note that this action plan contains steps required to realise future opportunities and achieve the recommendations included in section 6 of this report, as well as supplementary actions that can be undertaken to further the success of this Plan.

Short term strategies are those to be implemented within the year (2013 - 2014), medium term are those within the next two to three years (2014 - 2016) and long term includes those to be undertaken after three or more years (2017 onwards).

TABLE 16: KEY RESULT AREA 1 –

REGION-WIDE ACTIONS TO ATTRACT A BROADER RANGE OF VISITOR MARKETS TO THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Food and heritage trails	Work with industry to develop and market a range of food and heritage trails throughout the region	ECRTO and Industry Operators	Short term	N/A	▪ 2 trails developed and marketed by May 2014 ▪ A further 3 trails developed and marketed by December 2015
Cooking schools	Undertake feasibility for the development of cooking schools which cater for both adults and children. This will involve looking at possible demand, the most optimal location, grants which could be applied for and possible operators/developers for the school.	ECRTO	Short – medium term	$15k for feasibility	▪ Feasibility to be undertaken by June 2014 ▪ If positive outcome, then solicit developer/operator interest in developing the school by November 2014 ▪ Introduce by 2015
Development of a food based event/festival	Undertake demand/feasibility study to assess development of new seafood/local produce festival. Festival should occur during low/shoulder season to encourage off-peak visitation. The festival should be centred around seafood and other local produce such as produce from Pyengana, Kate's Berry Farm and	ECRTO	Medium Term	N/A	▪ Demand/feasibility study to be undertaken by June 2014
Development of a series of coastal walks/cycle ways with accommodation packages	Undertake a planning study and marketing strategy to create and promote a range of walking and cycling trails throughout the region	ECRTO	Short term	$10k for planning study $20k for marketing	▪ Development of planning study for various trails by June 2014 ▪ Concept marketed by January 2015
High quality eco-accommodation in national parks	Conduct discussions with Parks and Wildlife regarding the potential to develop high quality eco-accommodation within the national parks across the East Coast.	ECRTO, Parks and Wildlife, Break O'Day Council and Glamorgan Spring Bay Council	Medium term	N/A	▪ Initiate discussions between Parks and Wildlife, ECRTO and Councils

REGION-WIDE ACTIONS TO ATTRACT A BROADER RANGE OF VISITOR MARKETS TO THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Resolution of free camping issue	Undertake discussions with Parks and Wildlife to implement a new strategy regulating the camp sites (have a certain number of spots which are not able to be reserved, and the rest are pay for, reservable spots with additional facilities such as showers, bbq's, power etc.)	ECRTO and Parks and Wildlife Service	Short term	N/A	▪ Discussions with Parks and Wildlife to be undertaken by December 2013 ▪ Outcomes of discussions to be rolled out by June 2014
Investigate day trip photography 'hunting' tours	Liaise with Shutter Bug Tours (Hobart company) or similar to assess interest for undertaking day trip tours to the region focusing on wildlife such as Wedge Tail Eagles, Platypus, Fellow Deer etc.	ECRTO	Short term	N/A	▪ Liaison to occur prior to December 2013 ▪ If interest is there, tours to begin operating prior to June 2014
Encourage schools to undertake field trips to the East Coast	Integrate educational aids in ECRTO website that teachers can download to educate students	ECRTO	Short – medium term	N/A	▪ Website is clear and informative of educational significance of the East Coast ▪ Website references to direct curriculum relating to history, culture, geography etc.
Position the East Coast as a location for visitors travelling with pets	Undertake prefeasibility to determine the cost benefit of positioning the East Coast as a pet friendly destination.	Accommodation providers in collaboration with ECRTO	Short term – medium term	$10k for marketing campaign	▪ Create outline of the economic benefits of offering pet friendly accommodation; ▪ Undertake prefeasibility study by December 2013; ▪ Speak with local accommodation operators regarding interest for pet friendly accommodation. The economic benefits of doing so needs to be promoted; and ▪ Introduce pet friendly marketing campaign to promote the region to Australian's travelling with pets.

REGION-WIDE ACTIONS TO ATTRACT A BROADER RANGE OF VISITOR MARKETS TO THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Development of golfing trails	Undertake a planning study and marketing strategy to link and promote a number of golf courses throughout the region (linking in with courses external to the East Coast) by way of golfing trails	ECRTO, Golf Course Operators	Medium term	$20k for planning study $20k for marketing	▪ Development of planning study for golfing trails by December 2014 ▪ Concept marketed by June 2015
Assessment of facilities for motor home	Both Council's to assess facilities available for motor homes, particularly dump sites, as these are noted as lacking.	Break O'Day Council, Glamorgan Spring Bay Council	Short term	N/A	▪ Assessment to take place by May 2014

TABLE 17: KEY RESULT AREA 2 –

CREATION OF HUBS/NODES: SOUTHERN GATEWAY/ORFORD					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Promotion of walking tours	Promote and signpost Bluff River Walk as well as other walking experiences through Buckland, tying them in with food experiences at Brockley Estate. Consultation would need to be undertaken with owner of Brockley Estate Station as part of the Bluff River Walk is on the Station.	ECRTO, Brockley Estate, Glamorgan Spring Bay Council	Short – Medium term	N/A	▪ Promotional strategy for walks to be developed by June 2014
Solis site assessment	Undertaken liaison and assessment of proposed Solis site. This includes giving consideration to resizing the proposed developed.	Glamorgan Spring Bay Council, ECRTO and site developers	Short – Medium term	N/A	▪ Assessment to occur prior to May 2014
Southern Gateway signage	As part of the overall signage strategy, there needs to be a large attractive sign board on the southern gateway into Orford which will help reinforce that visitors have just entered the East Coast.	Glamorgan Spring Bay Council, ECRTO	Short term		▪ Signage to be developed and installed by May 2014

TABLE 18: KEY RESULT AREA 3 –

CREATION OF HUBS/NODES: STAGING POST/TRIABUNNA					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Expanded retail facilities and Expanded marina development	Facilitate it as the top priority tourism development project for the LGA	Glamorgan Spring Bay Council, ECRTO and industry supporting	Short – medium term	N/A	▪ Approvals are in place and investment locked in by February 2014 ▪ Commence development of first stage of marina's by late 2014

TABLE 19: KEY RESULT AREA 4 –

CREATION OF HUBS/NODES: RETAIL NODE/SWANSEA					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Wetland areas walking track at Swansea	Undertake demand study to assess the capacity of the wetland area and coastal area to become a spot for bird watching and walking	ECRTO and Glamorgan Spring Bay Council	Medium term	$20k for demand study	▪ Demand study undertaken by October 2014 ▪ If positive outcome, development to start by January 2015
Small winery trail from Swansea	Develop marketing study to promote Swansea as the winery hub of the East Coast.	ECRTO and winery owners	Short term	$15k for marketing study	▪ Marketing study to be undertaken by March 2014 ▪ Initiatives from study to be implemented by June 2014
Feasibility study for Wine Interpretation Centre	Undertake feasibility study to ascertain whether there is interest in utilising part of an existing heritage building as a wine interpretation centre for the greater East Coast region. This would involve consultation with the building's owner/operators.	Glamorgan Spring Bay Council, ECRTO and owners of potential locations/sites	Short – Medium term	$15k for feasibility study	▪ Liaison with Morris' General Store owners to occur prior to December 2013 ▪ Feasibility study to be undertaken by March 2014 ▪ If positive outcome is achieved, interpretation centre to be fitted out by December 2014
Greater Oyster Bay foot bridge/cycle way	Undertake feasibility study to determine costs/demand for foot bridge/cycleway from Swansea to Freycinet Peninsula. This may need to look at possible grants available for the development of the foot bridge.	ECRTO and Glamorgan Spring Bay Council	Medium term	$20k for feasibility study	▪ Feasibility study to be undertaken by December 2014 ▪ If positive outcome is achieved, development to start by February 2015

TABLE 20: KEY RESULT AREA 5 –

CREATION OF HUBS/NODES: COLES BAY/FREYCINET PENINSULA ACTIVITY HUB					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Leverage off profile of Wine Glass Bay and Freycinet National Park	Ongoing promotion	ECRTO, Parks and Wildlife Service	Ongoing	N/A	▪ Increased promotional reach achieved into target markets ▪ Higher visitation achieved
Strengthen link between food and beverage experiences and accommodation	Develop strategy to strengthen the link between food and beverage retailing and accommodation to market Coles Bay as a food hub.	ECRTO	Short term	N/A	▪ Operators working collaboratively ▪ New event(s) created ▪ Higher visitation achieved

TABLE 21: KEY RESULT AREA 6 –

CREATION OF HUBS/NODES: BICHENO RETAIL AND WILDLIFE HUB					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Greater promotion of Bicheno wildlife tours and natural attraction	Ongoing promotion of Bicheno as a wildlife hub	ECRTO and Industry	Ongoing	N/A	▪ Build into promotional campaigns ▪ Higher visitation achieved

TABLE 22: KEY RESULT AREA 7 –

CREATION OF HUBS/NODES: ST MARYS ACTIVITY NODE AND GATEWAY					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Classic car display	Investigate potential to have a rotating display of classic cars (we understand there are approximately 50 privately owned in St Marys)	Greater Esk Tourism, ECRTO and car owners	Short – medium term	N/A	▪ Potential to be determined by December 2013 ▪ If possible, suitable location to be determined by March 2014

CREATION OF HUBS/NODES: ST MARYS ACTIVITY NODE AND GATEWAY					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Archaeological dig trail	Undertake feasibility study to assess the possibility of creating an archaeological themed trail or attractions in St Marys. This should focus on the various blacksmiths and historic sites scattered throughout the town.	Greater Esk Tourism, Break O'Day Council and ECRTO	Short – Medium term	$15k	▪ Feasibility to be undertaken by June 2014
Enhance the main street of St Marys	Encourage Break O'Day Council to undertake feasibility for the cost of making enhancements to main street of St Mary's (see Appendix 2 for changes). This should also look at the ability of Council to attain a grant in order to undertake the required changes.	Break O'Day Council	Medium – long term	$25k for feasibility study	▪ Feasibility study to be undertaken by December 2014 ▪ If feasibility produces favourable result, development to start by March 2015

TABLE 23: KEY RESULT AREA 8 –

CREATION OF HUBS/NODES: ST HELENS ACTIVITY AND FISHING HUB					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Waterfront development at St Helens	Undertake feasibility study for the waterfront development at St Helens, including investigation for the development of a sports-fishing activity centre.	Break O'Day Council, ECRTO	Short – Medium term	$20K for feasibility study	▪ Meet with Break O'Day Council to discuss planning requirements and land use ▪ Undertake feasibility study by May 2014 ▪ If positive outcome, then solicit investor interest in development of the site by December 2014
Greater promotion of fishing in the East Coast and position St Helens as fishing capital of Tasmania	Develop promotional strategy to position and brand the east coast as a fishing hub, highlighting the year-round fishing that can be undertaken in the region.	ECRTO, Break O'Day Council, Glamorgan Spring Bay and Industry Operators	Short term	$15k for promotional strategy	▪ Strategy to be developed by May 2014

CREATION OF HUBS/NODES: ST HELENS ACTIVITY AND FISHING HUB					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Visitor centre location	Undertake an assessment on the current location of the VIC at St Helens and provide options for a more optimal location, including integration into the proposed waterfront development.	ECRTO and Break O'Day Council	Short – Medium term	N/A	▪ Undertake assessment by April 2014
Improve signage for natural attractors in and surrounding St Helens	Integrate into signage strategy, the need for improved signage to promote natural attractions in the region, including the Bay of Fires and the Blue Tier Forest Reserve	ECRTO and Break O'Day Council	Short term	N/A – incorporated in signage strategy	▪ Signage strategy is developed by December 2013

TABLE 24: KEY RESULT AREA 9 –

MAXIMISE VISITOR AND LOCAL COMMUNITY EXPERIENCES OF THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Visitor services strategy for the region	Commission the development of a visitor services review and strategy to assess the performance of the existing VICs in the region, including financial performance and visitation numbers.	ECRTO, Break O'Day Council and Glamorgan Spring Bay Council	Short term	$25k	▪ Review undertaken by May 2014
Tourism awareness program	Develop a community tourism awareness program which demonstrates the significance of tourism for the East Coast economy	Break O'Day Council, Glamorgan Spring Bay Council and ECRTO	Short-Medium term	$15k for promotion	▪ Community awareness program developed and rolled out by July 2014

MAXIMISE VISITOR AND LOCAL COMMUNITY EXPERIENCES OF THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Interpretative and Directional Signage Strategy	Development of a signage strategy which identifies ideal signage locations to promote the East Coast's attractions/experiences in a highly appealing way. Additionally, the signage strategy should assess the need and appropriate location for directional signage across the region.	ECRTO, Break O'Day Council and Glamorgan Spring Bay Council	Short term	$15k for signage strategy and $60k for signs/new skins	▪ Signage strategy is developed by February 2014 ▪ Design for new signage completed and tested by July 2014 ▪ New signage designed and submitted for State Government approval by September 2014 ▪ New signage is installed no later than 4 months post State Government approval (January 2015)
Raise the standard of larger accommodation properties on the East Coast	Undertake audit on accommodation properties to assess how they can be made more profitable and what other changes may improve performance	ECRTO in liaison with accommodation property operators	Short – Medium term	N/A	▪ Audit to be undertaken by February 2014
Encourage retail operators to stay open for longer hours	Investigate the implementation of a rotational staffing system and other possible options	ECRTO, Retail Operators, Chamber of Commerce, external service provider and retail/restaurant operators	June – October 2013	N/A	▪ Assess all options by January 2014 ▪ Actively encourage retailers to open over weekends and especially when major events are on, by May 2014
Establish roster between businesses to collaborate on opening times	Facilitate the development of an online roster available for retail operators which includes opening hours.	ECRTO, Retail Operators, Chamber of Commerce, external service provider and retail/restaurant operators	Ongoing	N/A	▪ Develop roster program by December 2013

MAXIMISE VISITOR AND LOCAL COMMUNITY EXPERIENCES OF THE EAST COAST					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Stimulate investment into the East Coast	Create investment memorandum to stimulate investment by developers into the East Coast for specific tourism facilities and which indicates the types of development in tourism which the Councils will actively support.	ECRTO, Break O'Day Council, Glamorgan Spring Bay Council and Tourism Tasmania	Short term	N/A	▪ Memorandum drafted and approved by May 2014

TABLE 25: KEY RESULT AREA 10 –

ENHANCE MARKETING AND BRANDING OF THE REGION					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Mobile application for the East Coast	If the AppNGo model is deemed unsuitable for the purpose of promoting the East Coast as a tourism destination in its own right, an innovative and feature rich universal application or mobile-based website should be developed. This should be able to be installed to all iPhone, Android and Blackberry mobile devices. Application should feature maps of the region, key locations, booking information and interactive walk through tours in addition to providing users with recommendations based on their location utilising GPS tracking.	ECRTO, Break O'Day Council, Glamorgan Spring Bay Council and Tourism Tasmania	Short term	$40k	▪ Application developed by December 2013 ▪ Reach 1,000 unique downloads in year 1 of availability ▪ Increase in downloads as targeted by 20% per annum from year 2 on ▪ Decrease in hard copy brochures printed for VICs as targeted by 15% per annum from year 2 on
Packaging of product	The packaging of experiences, dining, accommodation and transport. This will involve a wide range of stakeholders but ECRTO will need to take leadership and play the facilitation role for this.	ECRTO, tourism industry operators and Tourism Tasmania	Short term	$20k for marketing	▪ 5 key product packages to be released by April 2014 ▪ A further 5 product packages released by April 2015.

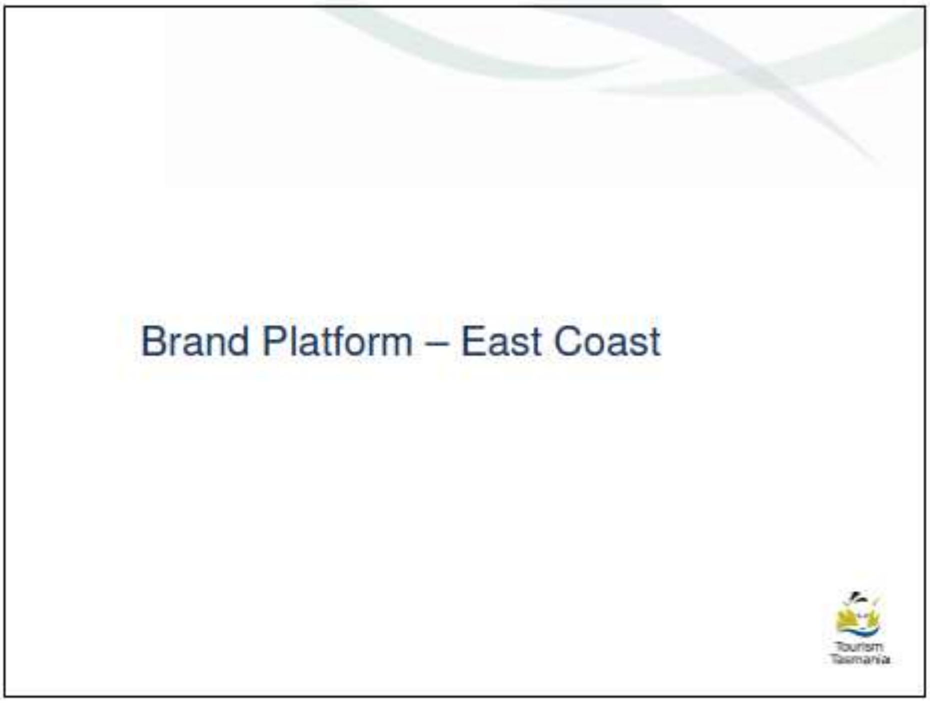
ENHANCE MARKETING AND BRANDING OF THE REGION					
STRATEGIES	**TASKS**	**RESPONSIBILITY**	**TIMING**	**BUDGET**	**KPIS**
Completion of regional brand development	Completion of the regional brand development for the East Coast and the application of the brand and any taglines in all collateral	Tourism Tasmania, ECRTO, Break O'Day Council and Glamorgan Spring Bay Council	Ongoing	N/A	▪ Branding to be completed by September 2013 ▪ Branding and taglines to be integrated into all future marketing collateral
Social Media Strategy	Development of a social media strategy for the East Coast which includes the integration of the website portal with Twitter, Facebook and Foursquare.	ECRTO	Short term	$15k	▪ Strategy developed by June 2014 ▪ Growth in East Coast brand recognition as targeted by 15% per annum from June 2014 on ▪ Increase in Facebook members/likes as targeted by 20% per annum from June 2014 ▪ Increase in Twitter members/likes as targeted by 15% per annum from June 2014
Stimulation of visitor experience through online innovation	Enhancement of existing regional website to include an interactive tour experience and interactive, actionable (bookable) itineraries	ECRTO	Short term	$15k for website enhancements and bookable itineraries	▪ Virtual unique visitors to ECRTO website to increase as targeted by 15% per annum from December 2013 ▪ Bookable itineraries introduced by May 2013
Encourage stronger relationship and partnerships with Parks and Wildlife	Encourage Parks and Wildlife to partner with ECRTO, both Councils and Tourism Tasmania to better promote the Parks and in a way which actively encourages more product to be developed as well as better utilisation of the parks.	ECRTO, Parks and Wildlife Service, Break O'Day Council and Glamorgan Spring Bay Council, Tourism Tasmania	Short – Medium term	N/A	▪ Discussions to commence prior to May 2014

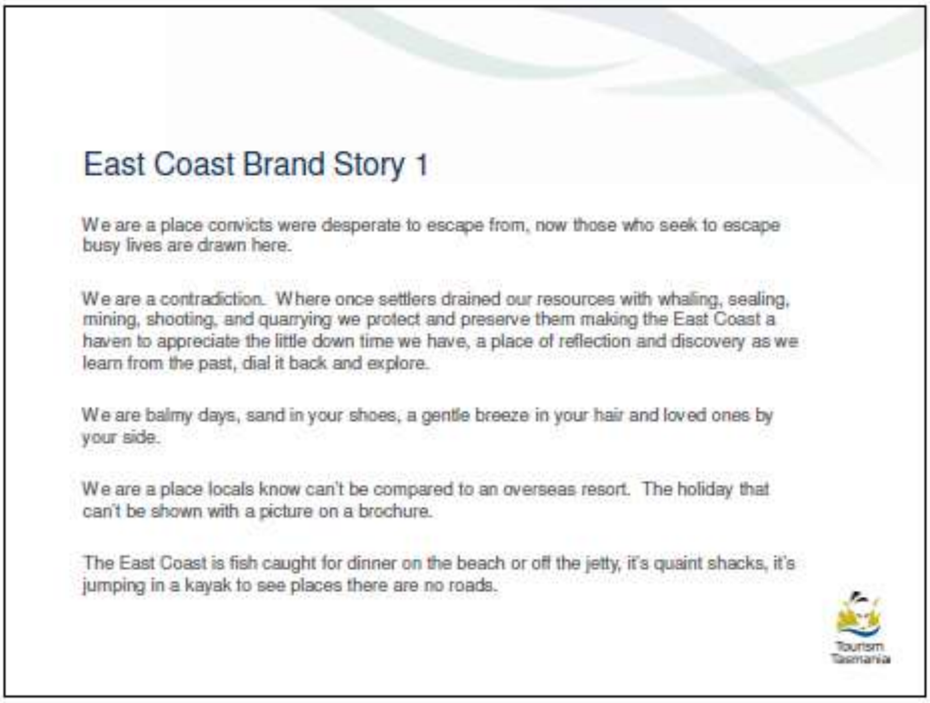
ENHANCE MARKETING AND BRANDING OF THE REGION					
STRATEGIES	TASKS	RESPONSIBILITY	TIMING	BUDGET	KPIS
Boost national awareness of the East Coast	Develop a visiting journalist famil program	ECRTO	Short-Medium term	$10k for development of famil program	▪ Formal famil program developed ▪ Minimum of one famil visit per two months is held annually ▪ Number of articles/media releases about the East Coast increases ▪ National awareness and appreciation of the East Coast is increased
Undertake study tour of West Coast of New Zealand	Undertake an organised study tour of the West Coast of New Zealand to look at a comparable region which has similar characteristics and look at solutions developed for product development.	ECRTO, Break O'Day Council and Glamorgan Spring Bay Council	Short term	$10k	▪ Study tour to be undertaken by May 2014

10. APPENDIX

Appendix 1:	East Coast Brand Story – Relevant Slides
Appendix 2:	St Marys Road Enhancement Plans

10.1. EAST COAST BRAND STORY – RELEVANT SLIDES





East Coast Brand Story 2

We are a temperate Riviera. A juxtaposition of moods and an abundance of seafood.

Our fishing village charm contradicts our whaling past.

We have Goblin walks, shack culture, mountains of woodchips, fear and beauty merged.

Our beaches, eerie and deserted, cradle kelp ghosts, giant forests of the ocean.

We're a quiet coastal refuge from a deafening world.

We have a Wineglass Bay and a Bay of Fires. We cause breath to be lost, time to be slowed and feelings to be centred.

We are the dream at the end of the world.

Tourism Tasmania

East Coast Experience Statement

The East Coast is not your average holiday playground.

It is not a commercialised holiday mecca, there are empty beaches, small fishing towns.

It's reality is often surprising, breathtaking, fulfilling, the locals talk to you, wave at you as you drive by and share stories and secrets.

A minute on the East Coast runs to 93 seconds.

While everything joins the race to be bigger, better, faster, the East Coast need not change.

Tourism Tasmania

Knowledge was drawn from workshops in the North West. Below is a selection of responses to…*"If you're the kind of person who……you will love the East Coast of Tasmania."*

Tourism Tasmania

Exploring our attributes

- Bigger on the Inside
- Brutal Beauty
- Disarming
- Offbeat and Original
- Seductive

Tourism Tasmania

Bigger on the inside

Benefits
(What it means to others)

- Personal discovery (you become bigger on the inside)
- A reality check
- More than they expected
- Self-awareness

Personality
(Our character)

- Understated
- Disarming
- Unexpected
- Rich life of happy people
- Mature innocence
- Generous
- Not fake
- Unpredictable
- Unassuming
- Soulful
- Humble
- Earthy
- True
- Trustworthy
- Honest

Proof Points for the East Coast
(Credibility)

- Wineglass Bay
- Maria Island, so much more than you thought existed
- Quirky gallery in St Helens
- Freycinet Marine Farm, tiny oysters, big taste
- Bay of Fires
- Apsley Gorge and Waterhole
- Avalon, small space big view
- Freycinet to Eco resort, the Ark
- Freycinet Experience, tiny footprint, big experience
- Maria Island Walk
- Aboriginal cultural heritage
- Bicheno penguin tour, dominance of mother nature
- Diving and surfing experiences
- Vineyards history and quality

Tourism Tasmania

Brutal Beauty

Benefits
(What it means to others)

- Experiences "in the raw"
- Persecution stories in a spectacular environment
- Honest (flawed)
- Unedited environment/people
- Accessible isolation
- Troubled
- Conflicted

Personality
(Our character)

- Determination
- Flawed
- Connected
- Vicious
- Passionate
- Greedy
- Disturbed (history)
- Unforgiving
- Harsh
- Lonely
- Isolated
- Haunting
- Troubled
- Conflicted

Proof Points for the East Coast
(Credibility)

- Apsley Gorge
- Darlington – Maria island
- St Patricks Head climb and view
- Schouten Island
- South Sister
- Bay of Fires story
- Freycinet Peninsula
- The Gulch (whaling history and now a marine reserve)
- Saffire
- Evercreech Forest
- Douglas River after a storm
- Triabunna dive wreck
- Triabunna wood chips
- Diving in kelp forest – Governor Island
- Wind farm – brutal
- Eddystone Point
- Mt William
- Nature world (injured/sick animals)
- Blue Tier (history, heritage)
- Fingal Valley
- Wineglass Bay Walk – difficult but breath taking
- Aurora Beach Cottage – Seymour
- Bear Rock in Fingal Valley
- Road kill
- Surf
- Coal mining history

Tourism Tasmania

Disarming

Benefits (What it means to others)
- Unexpected revelations
- Losing inhibitions
- Catching off guard

Personality (Our character)
- Authentic
- Genuine
- Naive
- Spooky
- Likeable rogue
- Subtle
- Not in your face
- Irreverent
- Subtle
- Inspiring
- Unaffected
- Raw

Proof Points for the East Coast (Credibility)
- Spiky Bridge
- Lisdillon Salt Works
- Elephant Pass Pancake Parlour
- Eddystone Lighthouse
- St Mary's Pass – not a water shed but a 'season shed'
- Moods in the water – different blues
- Juxtaposition of old/new buildings eg Morris's Swansea
- Beautiful/Eerie deserted beaches
- Cliffs at St Patricks Head – dangerous/beautiful
- Blue Tier – Goblins Walk
- The sheer abundance of wildlife
- Wineglass Lookout – and the story of wineglass bay
- Maria Island – fear and beauty
- Bicheno Blowhole
- Pub at St Mary's
- Oysters straight out of the water – shucked for you
- Tradition of fishing – floundering
- Free camping/camping culture
- Ice cream to order in Bicheno
- Bicheno Gulch, Triabunna Marina
- Pyengana Cows and Sheep on the Tasman highway
- Pig at Pub in the paddock
- Danger and beauty of the coast
- Dogs in utes – often not tied up
- Cherry Tree Hill view
- Sheep with a view
- Shack culture
- Moulting Lagoon – duck shooting, but also an internationally protected wetland (RAMSR)

Tourism Tasmania

Offbeat and Original

Benefits (What it means to others)
- Everything has a story
- The stories are real

Personality (Our character)
- Crazy weird people
- Quirky
- Weird
- Authentic
- Raw
- Unaffected

Proof Points for the East Coast (Credibility)
- Mt Elephant Pass Pancakes - quirky building, staff, no eftpos
- Purple Possum – organic, wholefoods store in small town
- Pub in the paddock – the pig – beer drinking pig in country pub
- Kate's Berry Farm – the character of Kate (what if she's not there)
- Antiques shop out of St Helens – offbeat location, unexpected
- Pyengana Cheese – cow pat cake
- Butcher at Bicheno – Sir Loin Briar
- Mayor Bertrand – goes without saying
- Douglas River camping – off the beaten track
- Picaninny Point
- Cranks & tinkerers – car club in St Mary's
- St Helens Wharf – working, fishing, wharf
- Scallop pies
- Maria Island history – Bernacci
- Gifts at Triabunna – unique crafts and decorations
- Whale watching close to coastline
- East Coast views/seascapes – unique/original
- Lake Leake pub
- Sheep with the best view in Tassie – Kelvedon
- Spiky Bridge – visually unique
- Gumleaves – shoes on fence
- Lisdillon Salt Works – history, mystery of founder
- Buckland Church – eg church window
- Fractangular – music festival – folk
- Little Penguins at Bicheno
- Unique restaurants – Kabuki
- Giant kangaroo road signs
- Beware of the Penguin road sign
- French connection

Tourism Tasmania

Seductive

Benefits (What it means to others)	Personality (Our character)	Proof Points for the East Coast (Credibility)
• Emotional engagement • Lure • Embracing • Mesmerising • Liberating • Losing your inhibitions • Purely emotional	• Real, not many "made up" • Naughty • Confident • Self-relief • Honest • Grounded • Likeable rogue • Alluring • Engaging • Sensual • Unsure • Conservative • Unpretentious • Confident • Self-aware	• Unfolding vistas – unexpected around dramatic scenery – every next corner • Quaintness, old and new contrast • Award winning accommodation in prime location • Local seafood and wine in combination with the environment • Driving experience, cycling, motorbikes – freedom of the open road • Short walks – surprises • A world heritage history around incarceration, transportation and imprisonment • The French connection • Tasmanian Riviera • Escapism, feeling of freedom • Throw off your shackles

Tourism Tasmania

Obituaries

Imagine your beloved East Coast or Tasmania was lost forever, how would you feel, what would you miss most?

The following obituaries express how people feel about the East Coast and what it means to them.

It's with much sadness that we say goodbye to the sand, the surf, the rivers and mountains. A long, long history with many a story yet to be told. A glimmering exterior stunning even during gloomy and wicked weather. But scratch the surface, start digging some holes, peering between the cracks and so much more would be revealed. Different things to different folks – a flathead at dawn, a walk through the scrub, wine by the fire. Memories, emotions, a rock on the shelf…all that's left, but that's okay.

Where to next??

An unfulfilled promise – areas of such reflective beauty that only a chosen lucky few were ever able to experience. No pulse – it just stopped breathing – devastated by a small economy. It passed away without fanfare. Slipping quietly into the sea for which it was so rightly famous. Such irony.

Sad, but beautiful.

You will be missed.

Tourism Tasmania

Obituaries continued

Invitation

You are invited to the funeral ceremony of the East Coast of Tasmania.

After a long, rich, convoluted life, it passed away, victim of a new chronic illness: *Stagnation Indifference*.

The ceremony will be followed by a solemn party of celebrations to mark the new birth of the East Coast of Tasmania, from now on a place on the move and propitious to love and emotion away from the insanity of the rest of the universe.

..the railway station of Perpignan* (France) better watch out!

*(*According to Salvador Dali, Perpignan railway station is the centre of the universe.)*

The new centre of the universe is the new reborn East Coast of Tasmania.

The beautiful East Coast of Tasmania passed away without realising its aspirations or potential to become a world class attraction or destination.

Despite the best endeavours of its communities and supporters, it was unable to compete with other more highly promoted and successful representations.

The autopsy revealed chronic underfunding and consistent over expectation.

A decision will be made today whether to bury the corpse or attempt to resuscitate the body under a new brand.

Tourism Tasmania

Obituaries continued

I knew the East Coast for such a very short time. In that time I enjoyed her vitality and beauty that everyone who met her felt.

An identify of enormous presence, the East Coast was a place that so many visited, much like a dearly-loved relative.

Some went to see her every Christmas, many others more rarely, but the most fortunate, saw her and experienced a relationship that was daily.

The most fortunate were those who knew her all their lives.

R.I.P.

What happened to the wonderful destination for many people?

The experience has passed on and is no longer the attraction it once was.

There are a number of reasons for this and was brought about by economic, political and lack of foresight by the industry responsible for promoting the destination and experience.

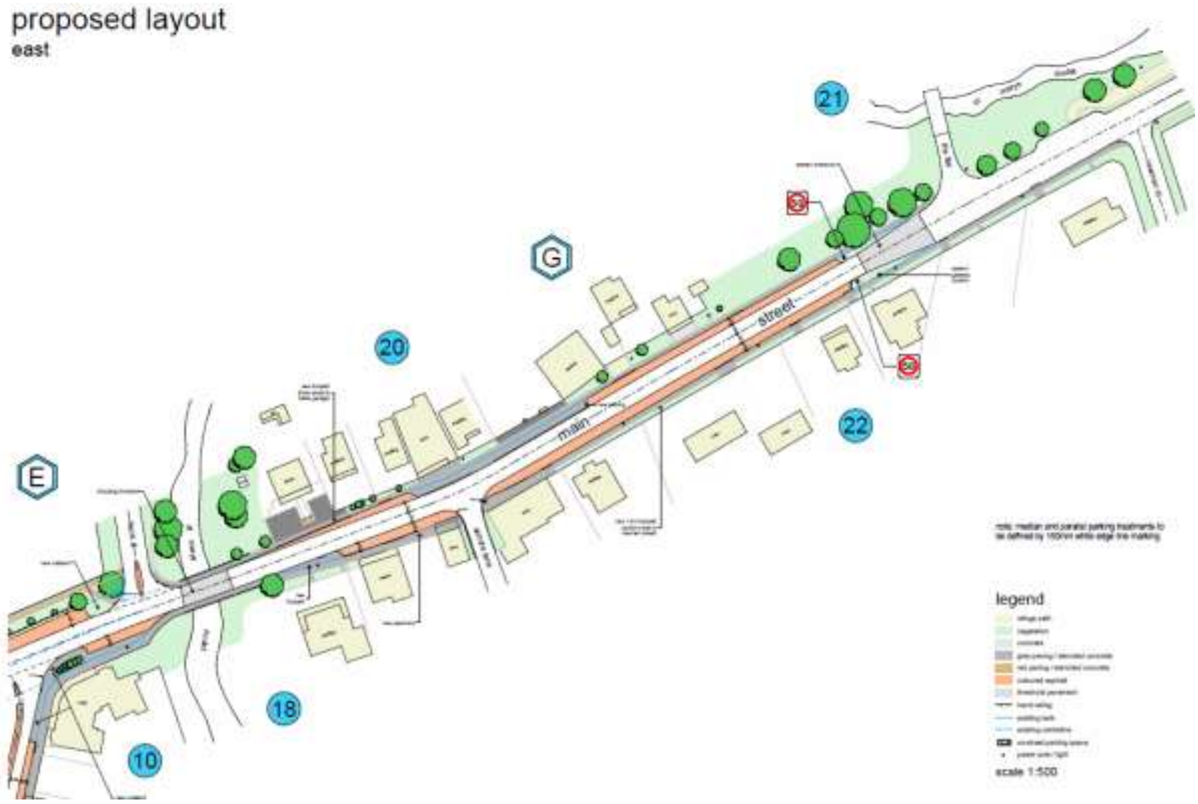
Tourism Tasmania


East Coast brand expression through imagery
The key is the exploration of Tassie's many nooks and crannies...
Tourism Tasmania

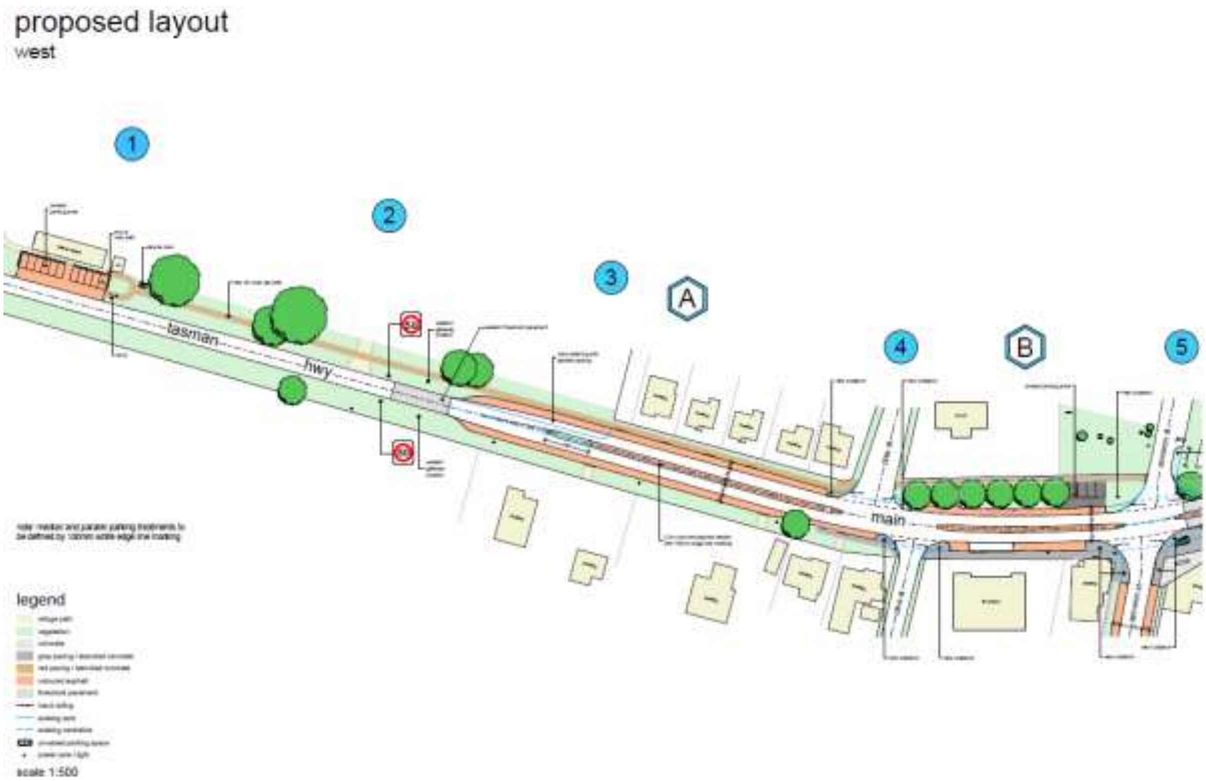

East Coast brand expression through imagery
The key is the exploration of Tassie's many nooks and crannies...
Tourism Tasmania

10.2. ST MARYS ROAD ENHANCEMENT PLANS

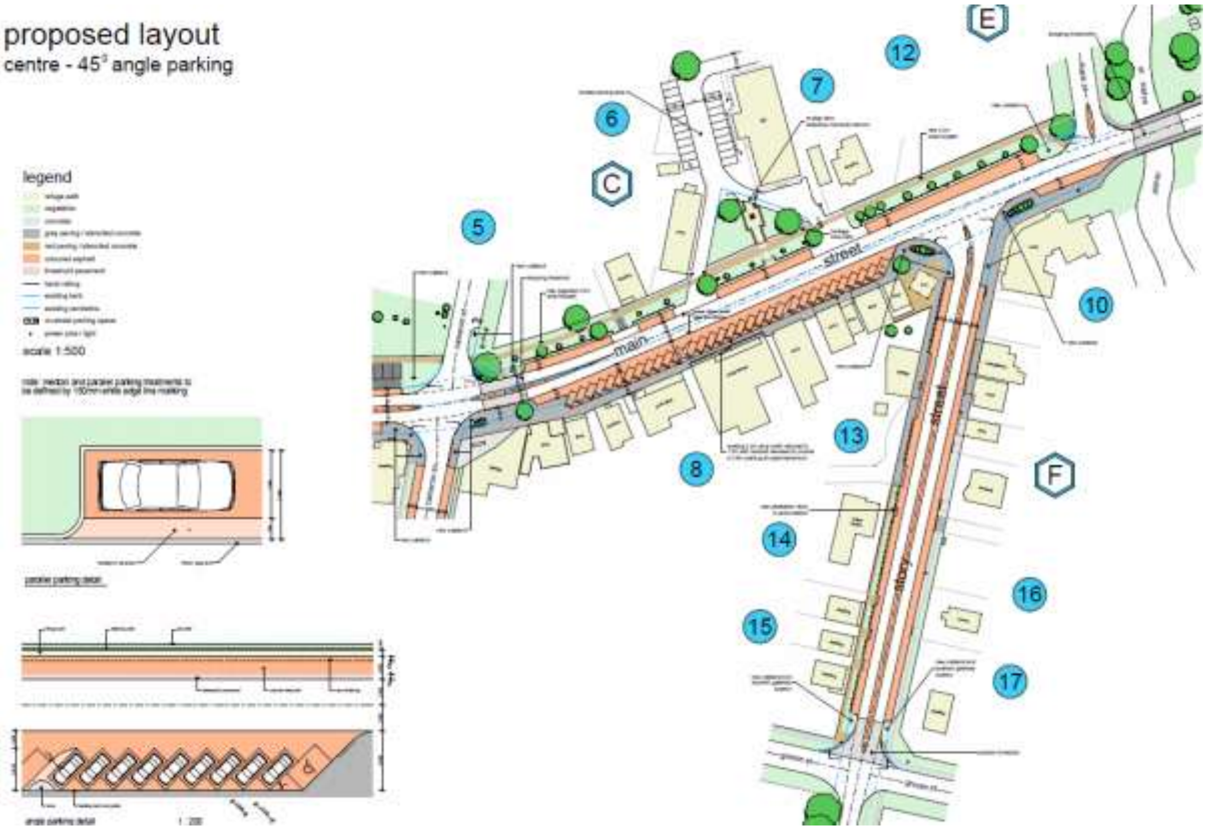
10.2.1. MAIN STREET – EASTERN APPROACH



10.2.2. MAIN STREET – WESTERN APPROACH



10.2.3. MAIN STREET – SHOPPING PRECINCT - 45° PARKING



10.2.4. MAIN STREET – SHOPPING PRECINCT – PARALLEL PARKING