

planning for sustainable tourism on tasmania's east coast



report 1 - sustainable tourism options report

prepared by geografia, hansen partnership, context and coliban ecology

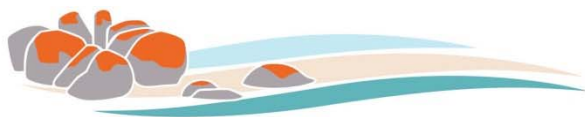
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Executive Summary

About this Project

Tasmania's East Coast has some of Australia's most celebrated natural coastline and beaches, including the Freycinet Peninsula and the Bay of Fires. This coastline, combined with a backdrop of forested mountains and a burgeoning wine and food trail, provides the region with very strong opportunities in tourism development. However, regional communities are concerned that tourism development should be sustainable. Sustainable tourism, in the words of the UN's World Tourism Organisation is,

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"

The regional councils of Break O'Day, Dorset, and Glamorgan/ Spring Bay, in partnership with the Australian Government, have determined to prepare a Sustainable Tourism Plan for the East Coast. They have commissioned a team led by Hansen Partnership to complete this Plan.

Existing Situation

Visitors

- In 2012-13, the East Coast tourism region (Break O'Day and Glamorgan-Spring Bay Council areas) received 517,000 visitors and hosted 861,000 visitor nights. Of the visitor nights, 250,000 (29% of the total for the region) were spent by interstate visitors and 69,000 (8%) by international visitors.
- Total visitor expenditure that year was estimated at \$135 million, with each overnight visitor spending \$157 per night on average. This spending supported around 600 jobs in the region.
- The region accounted for 7% of all visitor nights in Tasmania.
- The general trend in visitation is for growth. However, the global financial crisis in 2008 substantially reduced visitation by domestic and international visitors. Visitor numbers have only now recovered to the levels experienced before the GFC.
- The region is mainly a holiday destination, with relatively few people staying with friends and relatives or visiting for work, conferences or other purposes. Spending per night is generally lower than for Tasmania as a whole, particularly for intrastate visitors. This is influenced by the large numbers of people who stay in tents or caravans, with a high proportion staying in free campsites provided by the Parks and Wildlife Service (PWS).

- Coles Bay, Swansea, Bicheno and St Helens provide the major concentrations of commercial accommodation in the region, with smaller nodes at Scamander, Binalong Bay and St Marys.
- Around 50% of houses in the region are holiday homes, although this proportion rises to 70% or more in settlements such as Coles Bay, Bicheno, Binalong Bay and Ansons Bay.

Community

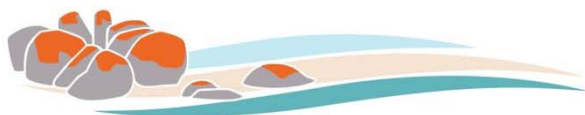
- The population of the East Coast tourism region is approximately 10,800. The population has grown at 0.8% per year on average over the past decade. However, this average masks a decline in population over the last three years.
- The official population forecasts are for continued growth in the region. However, these forecasts are dated and do not take into account the most recent demographic trends.
- The regional population is, on average, older than that of Tasmania as a whole; has lower household incomes; and has smaller household sizes. This pattern is typical of holiday and retirement areas with relatively low paid industries.
- With the decline of primary industries such as farming fishing and, especially, forestry, tourism has become the largest industry for the region over the past decade.
- The socio-economics of the region demonstrate that the success of tourism is crucial to the well-being of regional residents.

Visitor Forecasts

- Tourism Research Australia (TRA) forecast that nights by international leisure visitors to Australia will grow on average by 4.1% per year over the period to 2022-23.
- Growth in international visitors is expected to be strongest from the Asian developing countries (China and India). However, growth is also expected in the traditional markets that generate independent travellers who have been the mainstay of international travel to the region.
- TRA forecast that the number of domestic visitor nights will grow by 0.7% per year over the period to 2022-23.
- Visitor growth will vary by region. More people are seeking active, authentic, sustainable and special holidays and this could play to the strengths of East Coast Tasmania provided there is high quality tourism product available and accessible.

Key Challenges and Opportunities

- In broad terms, the viability of the regional tourism industry would be greatly improved through:



- Extending the length of stay of visitors
- Improving the yield from each visitor
- Evening out the seasonality of visitation so that businesses are viable throughout the year.
- These factors require more things for visitors to do and more commercial accommodation options including charging for existing camp sites.
- The GFC and the perpetual seasonality issues have resulted in a lack of reinvestment in the existing accommodation offering. At the same time, there has been substantial investment in individual attractions, such as the Saffire resort, with an identified niche market which have had a positive impact on regional development.
- A wide variety of potential accommodation, attraction and infrastructure projects have been identified. Investment and, where appropriate, development approvals are now required.
- Whilst the Bay of Fires is a well-known icon of the region, there is almost no commercial accommodation in the area north of Binalong Bay, despite there being several settlements.
- In a region with a small population but large numbers of visitors, funding for infrastructure is a significant issue. In some cases, charging visitors will be required. For example, there is a need to charge for at least some camp-sites in the Bay of Fires/MountWilliam area in order to provide the services that travelling campers require and to adequately manage environmental impacts. This will require development of different types of camp-site, with charges depending on the level of service provided.
- Improving access will generate more visitors. Sealed roads in the northern part of the study area will encourage more hire car drivers. More urgently, safe boat access to St Georges Bay is required to maintain both the commercial fishing fleet and recreational boating at St Helens and the attendant activities that they support.
- Whilst the interpretive signage in the region is patchy, PWS has developed a new signage strategy with common branding and interpretation of both natural and cultural heritage as well as management messages. There may be potential for this branding to be extended for use by other agencies active in the area. There is also potential for the development of new media interpretation and the creation of virtual trails through the region.
- Recreational walking is a competitive advantage for Tasmania, and the East Coast has several iconic walks for high paying customers. However, most walkers are not well catered for north of Freycinet. There is a significant opportunity to develop walking tracks that would constitute a major coastal walk. Such a walk would be a step-

on step-off walk that would encourage visitors to return time and again.

Investment Approvals

- Even though not all development delays are caused by the approvals process, there is potential to improve the efficiency of development control. In particular:
 - Information about processes and even controls affecting specific sites is currently difficult to access
 - There are a number of different Acts under which assessments are required, particularly in sensitive coastal areas
 - There is significant uncertainty as to the level of assessment and the responsible authority at the beginning of any application which can impact on the level of additional work needed
 - There is overlap, particularly between environmental assessments and stakeholder consultation, between different processes.
- The present uncertainty around planning schemes should be resolved as quickly as possible in order to provide more certainty and a process that is both equitable and sustainable.
- An improved base-level of information about natural and cultural heritage in sensitive areas would be useful. This could take the form of a checklist of issues that developers need to address.
- The production of management plans for those Parks and Reserves which do not have them could identify and resolve the appropriate balance between development and conservation. This would provide more certainty for investors and the community. Such plans need not necessarily be entirely prescriptive but could contain performance standards that identify the conditions under which development could take place.
- Development on the coastal fringe is clearly contentious and requires a high level of design and community input. A design guide for development professionals may be useful.

Tourism Policy Considerations

- Amongst local and regional agencies, there is widespread recognition of the issues affecting the East Coast – strong seasonality affecting business viability and investment and the need for more commercial product to generate jobs and incomes. There is a desire to leverage off the outstanding natural environment to create opportunities for sustainable development. There is also recognition that infrastructure investment is required in towns and access ways in order to

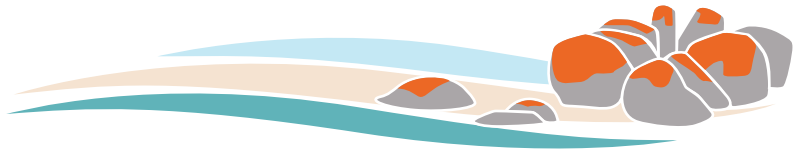


create beautiful urban places that will hold visitor interest.

- The need to leverage off the natural environment has support at a State and Commonwealth level where there are programs in place to promote the economic values of Parks and national landscapes.
- Parks and Reserves have management plans which nominate the level of visitor infrastructure expected and, in some cases, identify areas that may be suitable for private sector investment. However, several of these management plans in the study area are out-of-date or have not been completed. Nevertheless, it is likely that PWS will be moving towards a regime that allows a more performance-based assessment of private investment proposals.

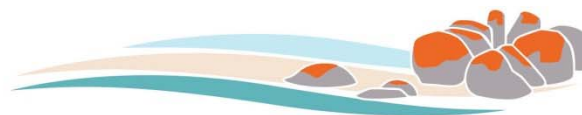
Options for Development

- This project is about land-use and development outcomes that support sustainable tourism development. In developing or adjusting the policy framework, it is useful to identify scenarios to test different approaches. The report provides three scenarios.
- Under the **Business as Usual** scenario, the economic value of tourism will stagnate as slow growth in visitor numbers is balanced by a decline in yield, with no investment in new or existing product.
- The **East Coast Blossoms** scenario envisages development in and around each of the key hubs of the region – Musselroe, St Helens, St Marys, Bichen, Coles Bay and Swansea. This will create dynamic and attractive visitor destinations, capable of sustaining the interest of interstate and international guests for extended periods. Public and private sector investment will extend the length of stay of visitors by creating more things for them to do in the area, generating higher incomes from tourism and improving services for residents, creating jobs in the process.
- The **String of Pearls** scenario aims to link the key towns and intermediate destinations of the region to create a regional experience trail. It will use the mechanism of a new East Coast Trail to significantly expand the provision of places to stay and things to do at suitable destinations along the coast. The scenario envisages development of the key hubs as in the previous scenario with appropriate development of smaller intermediate locations in order to create adequate accommodation.
- Modelling of these scenarios suggests that, by 2022-23, the additional real visitor spending will be:
 - \$8m per year under Business as Usual
 - \$39m per year under East Coast Blossoms
 - \$55m per year under String of Pearls.
- The effects of the options on the environment and culture of the region would also be different, as described below:
 - **Business as Usual** creates little new tourism product; the small growth in visitor expenditure will accrue mainly to the Coles Bay area which is currently the key destination for target markets (independent travellers from interstate or international origins). This will put some further pressure on the environment there. Elsewhere, the lack of investment and visitor growth will reduce the potential to fund infrastructure to manage existing conflicts between people and the environment. Nevertheless, lack of investment will generally mean that environmental and cultural values will remain unchanged from the present
 - **East Coast Blossoms** requires a concerted and coordinated effort to identify, plan and provide local infrastructure works to support tourism. This is likely to demand some changes to existing planning and development approvals arrangements. Impacts on existing natural and cultural values would mainly be indirect as long as care was taken at the development approvals stage
 - **String of Pearls** requires a coordinated effort to plan local and regional infrastructure to support tourism. This will include changes to the camping arrangements on the coast to generate more revenues and better services. The creation of a long distance trail and development of smaller accommodation nodes between main towns may have some direct and unavoidable impacts on natural and cultural values. However, these could be minimised through appropriate planning and implementation.
- Further assessment of the environmental impacts of these options and other impediments to development will be conducted as part of the next phase of this project.



part a - tourism review





1 Introduction

1.1 About this Project

Tasmania's East Coast has some of Australia's most celebrated natural coastline and beaches, including the Freycinet Peninsula and the Bay of Fires. This coastline, combined with a backdrop of forested mountains and a burgeoning wine and food trail, provides the region with very strong opportunities in tourism development. In fact, with the decline of primary production, tourism is now the largest industry for the small towns and communities of the region and in many areas provides the most significant opportunities for improving regional incomes and employment prospects.

Nevertheless, the region faces a number of challenges in creating a dynamic and sustainable tourism industry. The key challenge will be to attract visitors and investment without compromising the environmental and cultural values that are at the heart of the region's appeal.

In order to meet that challenge, the councils of Break O'Day, Dorset, and Glamorgan/ Spring Bay, in partnership with the Australian Government, have determined to prepare a Sustainable Tourism Plan for the East Coast region. The project is funded by the Department of the Environment through the 'Sustainable Regional Development program'. The Councils have commissioned a consulting team to prepare this Plan.

The team comprises:

- **Hansen Partnership** – land-use planners and project managers
- **Geografia** - economic development specialists
- **Context Pty Ltd** - cultural heritage specialists
- **Coliban Consulting** - biodiversity specialists.

Further details about the project, including surveys and opportunities for input can be found at www.ourtourismfuture.com.

The project is intended to build on existing tourism strategies, focusing on the land-use and development outcomes in order that planning policies can be brought into alignment.

1.2 About this Report

This report provides a review of barriers to, and opportunities for, sustainable tourism development on the East Coast of Tasmania and options for the development of sustainable tourism in the region. Appendices to the report provide an overview of the existing conditions and a preliminary assessment of the matters of national environmental significance that may affect the potential for tourism development in the region.

This report is the first in a series of reports that are planned over the course of the project (see figure 1 below).

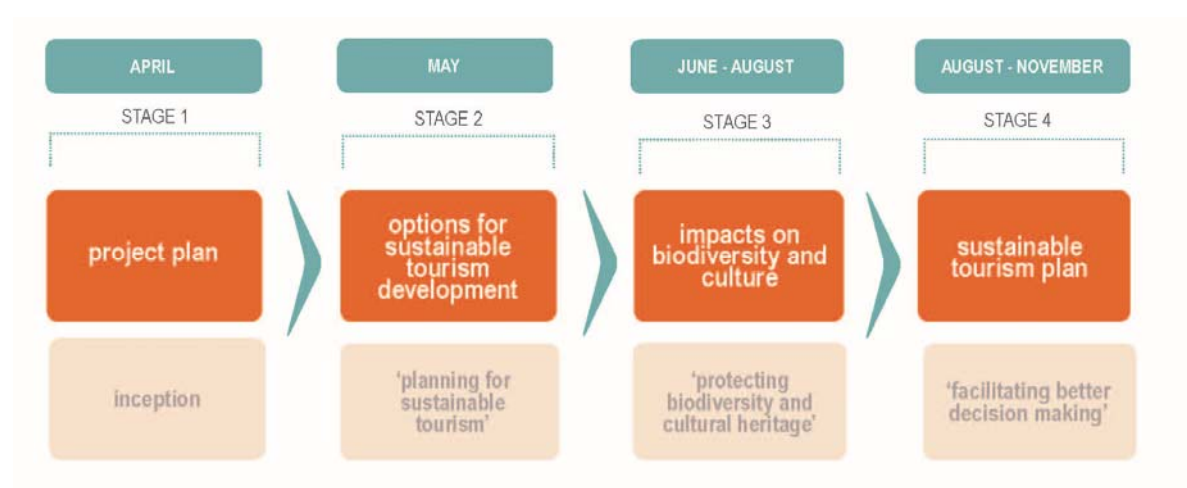
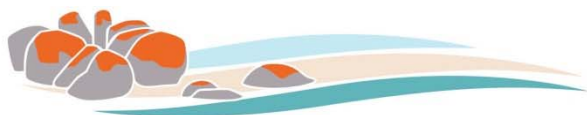


Figure 1: project process



1.3 What is Sustainable Tourism?

According to the UN's World Tourism Organisation:

"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"

(UNWTO, 2005)

Tourism development should strive for a balance between economic, social and environmental concerns. In particular, sustainable tourism should:

- 1) *Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity*
- 2) *Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance*
- 3) *Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.*

(UNWTO, 2005)

In the context of East Coast Tasmania these principles can be translated as follows:

Development of tourism should:

- Protect, conserve and interpret the biodiversity and natural beauty of the region
- Protect, conserve and interpret the cultural heritage of the region
- Contribute to equitable regional economic and social development

These principles are applied in the development of options for this report each of which place different emphasis on the key principles.

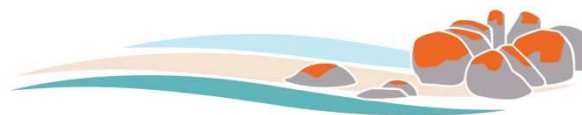
1.4 Consultation for this Project

A range of people and organisations are being consulted during the course of this project, including:

- Representatives of the three Councils involved
- Representatives of the Tasmanian Parks and Wildlife Service (PWS) and the Department of Primary Industries, Parks, Water and Environment (DPIPWE)
- Representatives of industry bodies such as the regional tourism organisations and chambers of commerce
- Representatives of community organisations such as the Tasmanian Aboriginal Land Council
- Representatives of heritage agencies such as Heritage Tasmania and Aboriginal Heritage Tasmania
- Individuals from environmental organisations such as BirdLife Australia
- Individual business operators in the region.

A broader community survey is being undertaken via the project website www.ourtourismfuture.com. In addition, other surveys of community sentiment about tourism development are being examined including work undertaken by Inspired Place (2011) and work currently being undertaken by Anne Hardy of the University of Tasmania on social attitudes to sustainable tourism development.

Reports produced for this project will be available via the website.



2 Location and Attractions

East Coast Tasmania, for the purposes of this project, extends from Musselroe Bay in the north to Swansea in the south. This area is detailed in Figure 2.

Tasmania's East Coast has some of Australia's most celebrated natural coastline and beaches, including the Freycinet Peninsula and the Bay of Fires. The tourism industry in the region has developed to cater for, firstly, Tasmanian visitors who routinely take holidays in the area, including at the many beachside holiday homes; and secondly for the interstate and international visitors who are travelling around the State or who are making special visits to the high end resorts in the area.

The key visitor node is the small town of Coles Bay, at the entry to the Freycinet National Park. The town and surrounds has several international standard resorts as well as a wide range of other accommodation types. The coastal towns of St Helens, Bicheno and Swansea provide the sub-regional service centres for the area and these are supported by a number of smaller towns and settlements such as Ansons Bay, Binalong Bay, Scamander and Falmouth.

Notable built attractions include:

- Bay of Fires Lodge Walk – a guided four day walk staying in luxury lodges
- Saffire Freycinet – an international standard luxury resort at Coles Bay
- Freycinet Lodge – a luxury resort within the Freycinet National Park.

There is a range of other commercial attractions including guided tours, boat hire and a growing winery sector. Most of these attractions rely on the outstanding natural beauty of the area and its “unspoilt” character.

Three National Parks and an extensive series of public land reserves cover much of the area (see Figure 2) and comprise:

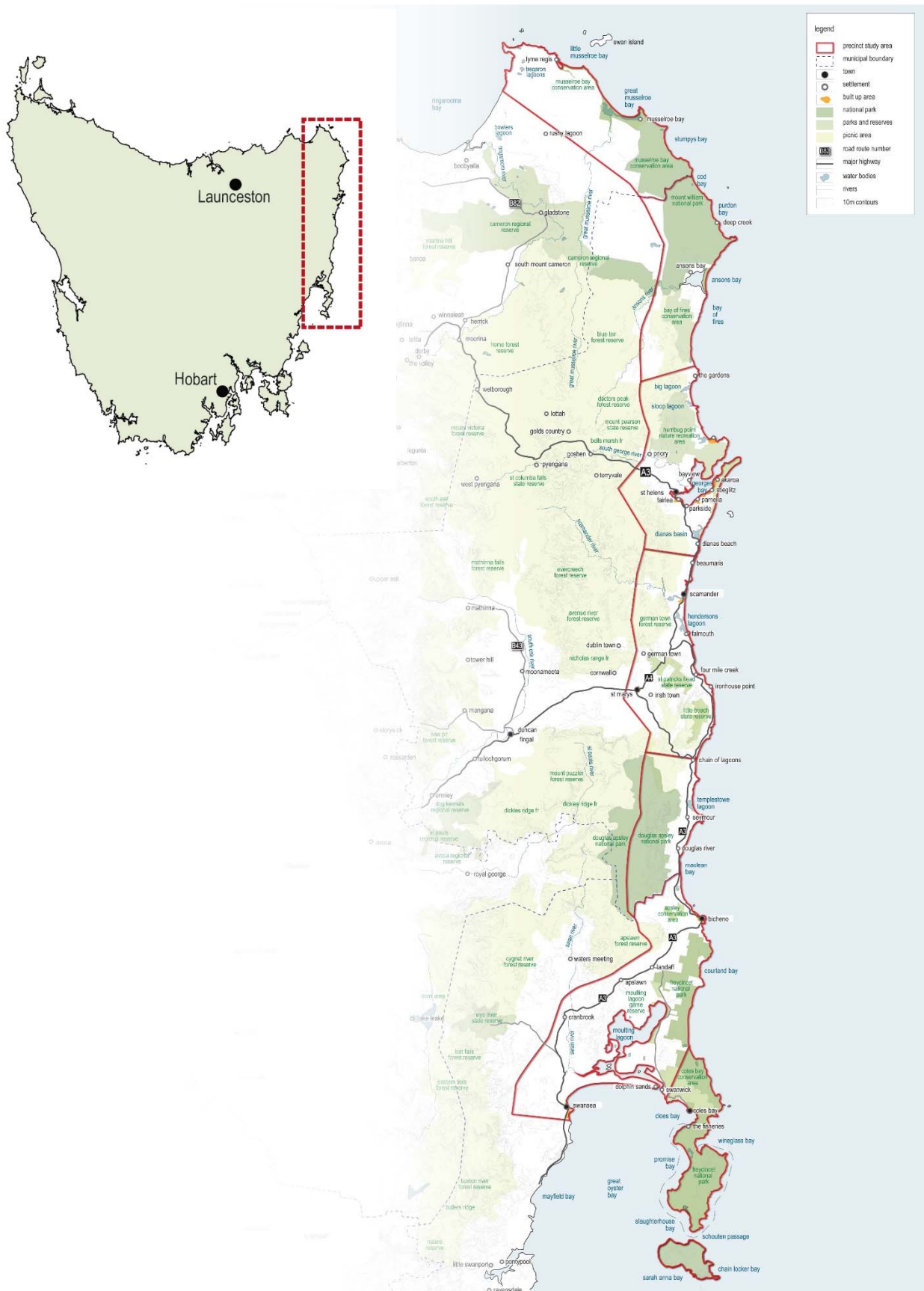
- Apsley Conservation Area
- Bay of Fires Conservation Area
- Coles Bay Conservation Area
- Doctors Peak State Reserve
- Douglas Apsley National Park
- Freycinet National Park
- Humburg Point Nature Recreation Area
- Little Beach State Reserve
- Lower Marsh Creek Forest Reserve
- Moulting Lagoon Game Reserve
- MountPearson State Reserve

- MountWilliam National Park
- Musselroe Bay Conservation Area
- Scamander Conservation Area
- St Helens Point State Recreation Area
- St Patricks Head State Reserve

The natural assets – landscapes, ecosystems and heritage places - contained in the public reserve system are the chief attractions of the region. It is these assets that must be protected and enhanced in any sustainable development of tourism in the area.



Figure 2: East Coast Tasmania: Study Area



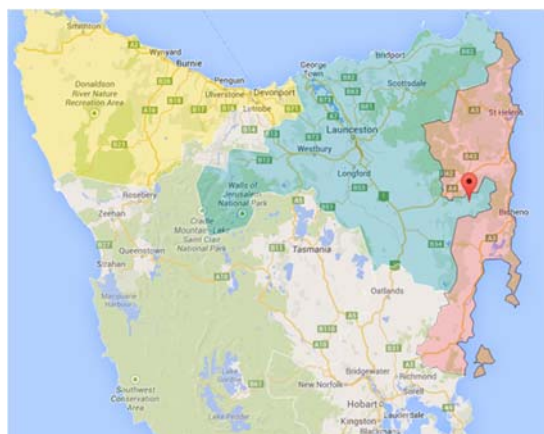


3 Visitors

3.1 Tourism Statistics

The scale of visitation and the characteristics of visitors to the region has been identified through surveys conducted by Tourism Tasmania (Tasmanian Visitors Survey) and Tourism Research Australia (National and International Visitors Surveys). The information has been collected on a regional scale. The East Coast region used for tourism purposes includes the municipalities of Break O'Day and Glamorgan Spring Bay which includes most of the study area (see figure 3). The tourism region excludes the small portion of the study area that is within Dorset municipality, comprising the community of Musselroe and parts of the MountWilliam National Park. It also includes parts of the Glamorgan Spring Bay municipality south of Coles Bay that are not in the study area, including Triabunna, Orford and Maria Island.

Figure 3: Tourism Regions in Tasmania (East Coast in red)



3.2 Visitor Summary

The number of visitors of different types and their average length of stay and expenditures are provided in the table below.

Table 1: Visitors and visitor expenditure, East Coast Tasmania Tourism Region, 2012-13

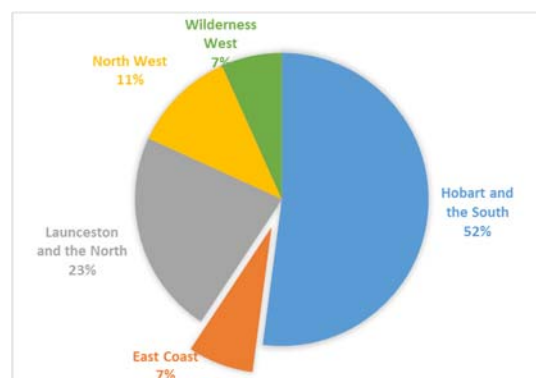
Visitors	Visitors ,000	Visitor nights ,000	Average stay Nights	Total expenditure \$million	Expenditure per visitor \$/visitor	Expenditure per night \$/night
Domestic Day Visitors	214	0	0	21	98	0
Tasmanian overnight visitors	172	542	3.2	57	330	105
Interstate overnight visitors	105	250	2.4	40	378	159
International overnight visitors	26	69	2.7	18	692	261
Total	517	861	2.8	135	262	157

Source: Tourism Research Australia, Regional Profiles, 2012-13

3.3 Visitor Numbers

The East Coast region received around 517,000 visitors and catered for 861,000 visitor nights in 2012-13. This constitutes 7% of all visitor nights in Tasmania as shown in the chart below.

Figure 4: Share of visitor nights by tourism region, 2012-2013

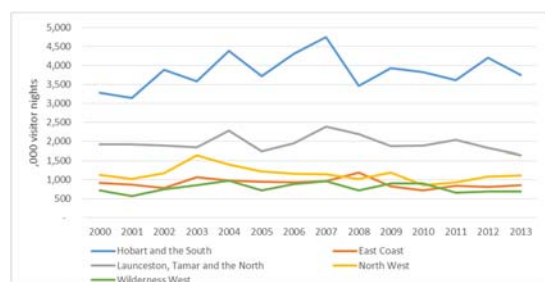


Source: Tourism Research Australia, Regional Profiles, 2013

Trends in visitor nights are available for domestic visitors only (that is, intrastate and interstate visitors), as shown in the chart below.



Figure 5: Trend in domestic visitor nights, Tasmanian tourism regions, 2000 to 2013



Source: Tourism Research Australia, National Visitors Survey, 2013

The number of nights spent by domestic visitors in the East Coast Region has varied up and down from year to year. However, it is clear that the global financial crisis in 2008 and the subsequent appreciation in the Australian dollar reduced domestic travel, although statistics suggest that the domestic tourism market is recovering on the East Coast, albeit at a steady pace. This is seen more clearly in the following chart.

Figure 6: Year by Year change in nights by domestic visitors, East Coast Region, 2000 to 2013



Source: Tourism Research Australia, National Visitors Survey, 2013

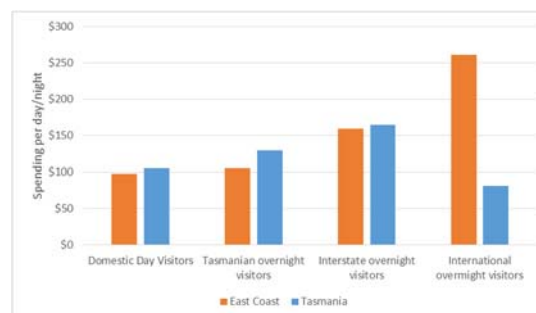
The number of visits by international visitors has shown a similar pattern, with little net change in numbers over the period from 2000.

3.4 Visitor Expenditure

From Table 1, total spending by visitors in the East Coast region is estimated at \$135 million in 2012-13. Based on spending per job of \$200,000 to \$250,000, this expenditure would support between 540 and 675 jobs in the region.

Average spending by different types of visitors is compared in the chart below.

Figure 7: Visitor spending per day/night, East Coast and Tasmania, 2012-13



Source: Tourism Research Australia, Regional Profiles, 2013

Compared with Tasmania as a whole, the East Coast Region has slightly lower average spending per day/night by day visitors and domestic overnight visitors but much higher spending by international visitors. International visitors stay a comparatively short time in the East Coast region; they are not generally staying with friends and relatives; a high proportion are staying in commercial accommodation. A high proportion of domestic visitors are staying in family holiday homes or are camping and this lowers the average nightly spending somewhat.

Overnight leisure visitors form the largest group, followed by day trippers (including people from interstate who travel through the region without stopping for the night). Overnight business travellers, conference goers and "others", including people visiting friends and relatives, are a minor proportion of the total.

These figures show that East Coast Tasmania is predominantly a holiday destination. In the main, people visit the area to experience its natural beauty and unspoilt landscapes rather than for business or to visit relatives. The region is relatively sparsely populated and has a relatively small business sector. This makes holiday tourism a major industry for the region as shown in the following section.



3.5 Purpose of Travel

The chief purposes for travelling to the East Coast region have been calculated for 2011-2012 by the Stafford Group, as shown in the table below.

Table 2: Purpose of travel, East Coast Region, 2011-2012

	Leisure o/night	Business o/night	Conference o/night	Other O/night	Day Trippers	Totals	Share of all visits
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%
Share of all visits	44%	3%	1%	9%	43%	100%	-

Source: Stafford Group, East Coast Destination Management Plan, 2013

3.6 Accommodation

The distribution of accommodation (measured in terms of rooms) is detailed in Figure 8. It shows that accommodation is clearly focused around the key nodes of St Helens, Bicheno, Coles Bay and Swansea. A large proportion of accommodation in the region is provided as individual homes or apartments that are rented privately.

There are a large number of holiday homes in the region. Figures from the 2011 Census on unoccupied dwellings provide a proxy measure for the number of holiday homes in area. Areas such as Binalong Bay, Ansons Bay, Coles Bay and Swanwick have very high proportions of unoccupied dwellings, in the vicinity of 70% and above. More major settlements such as Swansea, Bicheno and parts of St Helens also have very high proportions of unoccupied dwellings (in the vicinity of 40 to 50%). See Figure 9. These figures are consistent with the visitor profile showing a high proportion of intrastate visitation to the region.

The following table was recently prepared for the East Coast Destination Management Plan by the Stafford Group. It provides estimates of guest nights and occupancy rates across the region in commercial accommodation

Table 3: Total estimated guest nights for those staying in commercial accommodation, 2011-12

Type of Accommodation	# of operator	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%

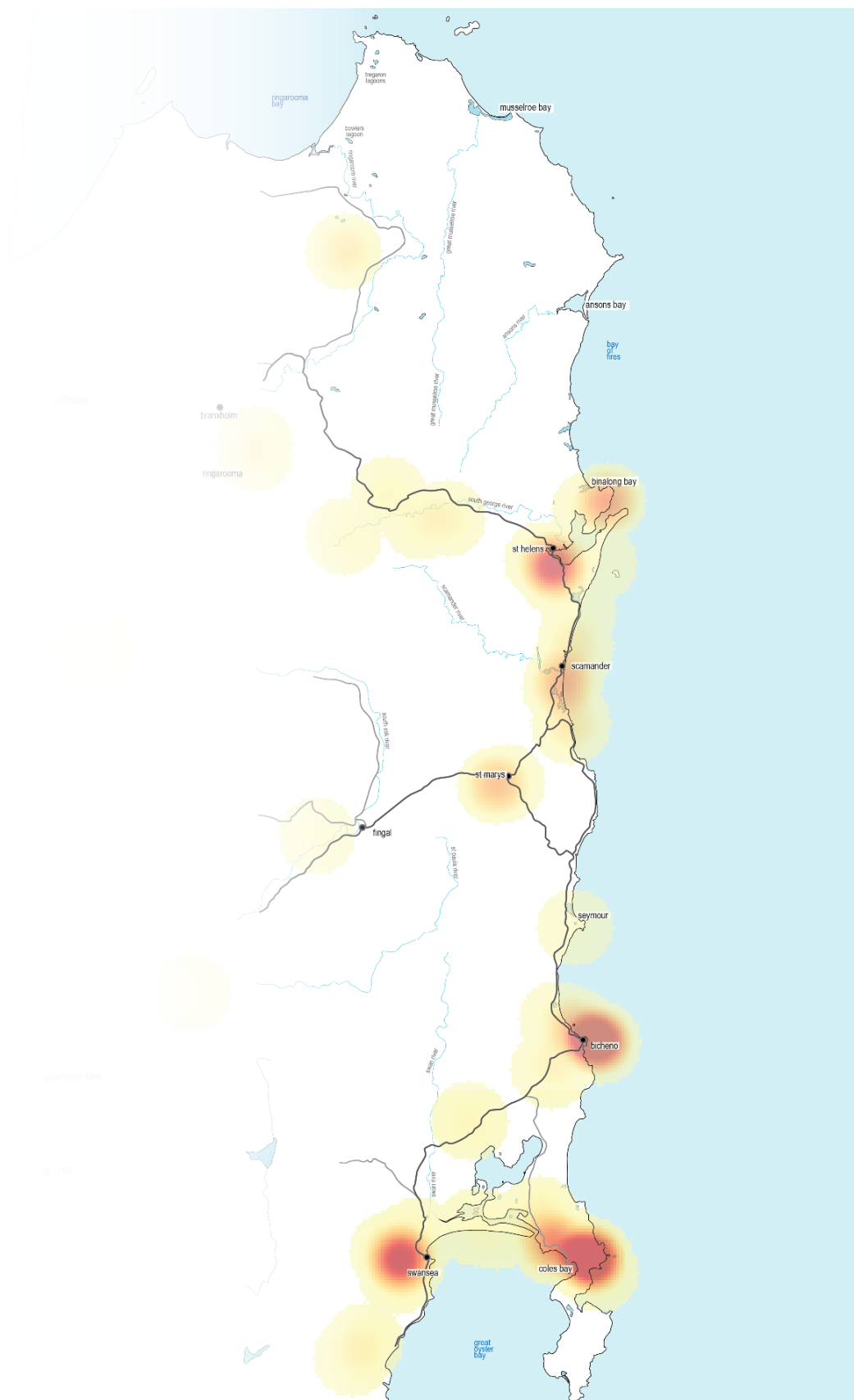
Source: Stafford Group, East Coast Destination Management Plan, 2013

The Stafford Group estimates that most visitors are accommodated in relatively large establishments (with more than 16 rooms), although there are large numbers of smaller establishments, particularly with five rooms or less. The average occupancy rate of these establishments is relatively low at 43%-45% - with typical average occupancy rates more of the order of 50%. Australia-wide, average occupancy rates in larger establishments are of the order of 60%-70%.

This is reportedly a result of the highly seasonal nature of visitation to the region, with most visitors arriving in the six months of November to April.



Figure 8: East Coast Tasmania Accommodation Distribution



Source: Geografia, 2014

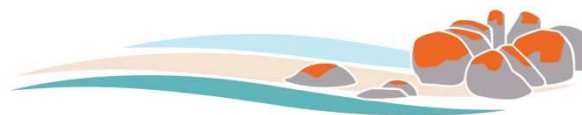
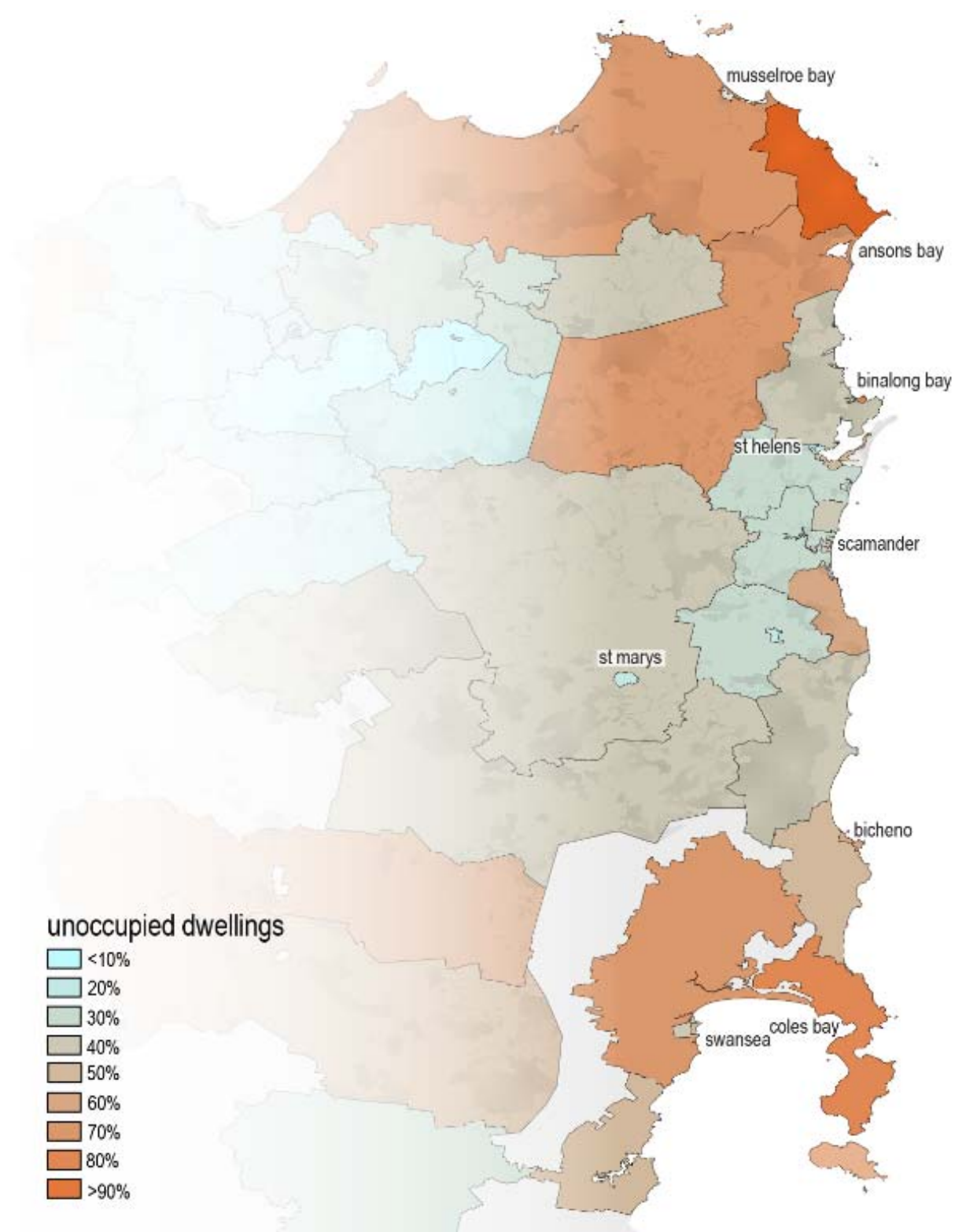
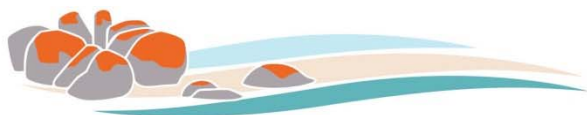


Figure 9: Unoccupied dwellings (% of all dwellings), 2011



Source: ABS, Census of Population and Housing, 2011.
Compilation: Geografia, 2014



3.7 Visitation: Summary

- In 2012-13, the East Coast tourism region (Break O'Day and Glamorgan-Spring Bay Council areas) received 517,000 visitors and hosted 861,000 visitor nights. Of the visitor nights, 250,000 (29% of the total for the region) were spent by interstate visitors and 69,000 (8%) by international visitors.
- Total visitor expenditure that year was estimated at \$135 million, with each overnight visitor spending \$157 per night on average. This spending supported around 600 jobs in the region.
- The region accounted for 7% of all visitor nights in Tasmania.
- The general trend in visitation is for growth. However, the global financial crisis in 2008 substantially reduced visitation by domestic and international visitors. Visitor numbers have only now recovered to the levels experienced before the GFC.
- The region is mainly a holiday destination, with relatively few people staying with friends and relatives or visiting for work, conferences or other purposes. Spending per night is generally lower than for Tasmania as a whole, particularly for intrastate visitors. This is influenced by the large numbers of people who stay in tents or caravans, with a high proportion staying in free campsites provided by PWS.
- Coles Bay, Swansea, Bicheno and St Helens provide the major concentrations of commercial accommodation in the region, with smaller nodes at Scamander, Binalong Bay and St Marys.
- Around 50% of houses in the region are holiday homes, although this proportion rises to 70% or more in settlements such as Coles Bay, Bicheno, Binalong Bay and Ansons Bay.

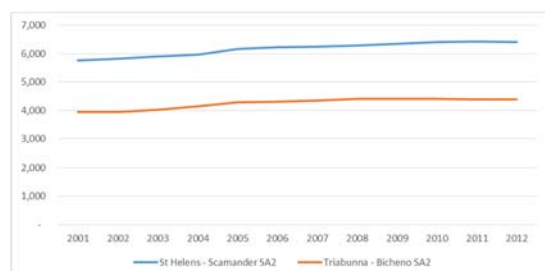


4 Community

4.1 Population

In 2012, the estimated resident population of the East Coast Region was approximately 10,800. The change of population in the two Statistical Areas of the Region over the last decade is shown in the following chart.

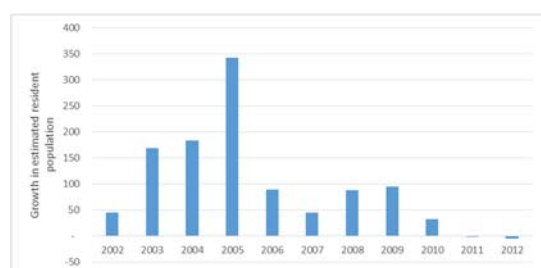
Figure 10: Estimated Resident Population, East Coast Region SA2s, 2001 to 2012



Source: ABS, Regional Population Australia, 2012

The following chart provides a clearer picture of the year by year population growth in the region.

Figure 11: Year by year change in estimated resident population, East Coast Tasmania, 2001 to 2012 (change from previous year)



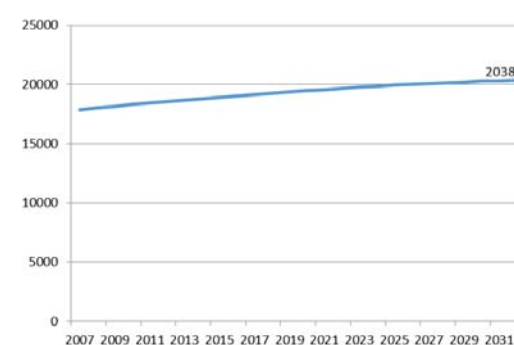
Source: ABS, Regional Population Growth, Australia, 2012

In the decade to 2012, the average annual rate of population growth in the East Coast Region has been 1.0% per year, compared with 0.7% in Tasmania as a whole over the same period. However, it is clear from the chart above that the last few years have seen a slowdown in population growth that has become an absolute decline. This mirrors a slowdown in the growth of the State as a whole (although the State continues to have positive growth).

4.2 Population Forecasts

State Government (Demographic Change Advisory Council, 2008¹) population projections suggest that the combined populations of Break O Day, Dorset and Glamorgan Spring Bay Councils will reach 20,400 by 2031 (see Figure 11). This figure includes areas of the three shires that fall outside of the study area for this project.

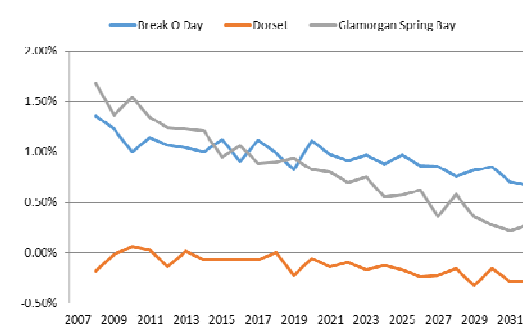
Figure 12: DCAC Population Projections for East Coast Tasmania Councils



Source: Tasmania Government, Demographic Change Advisory Council, 2008

The projections indicate that the bulk of this growth will occur before 2020, with growth rates decreasing substantially over time (see Figure 13). The population of Dorset Shire is expected to decline in real terms over the next twenty years, while Glamorgan Spring Bay and Break O'Day will grow by less than 1% per annum from 2020. This represents a significant departure from population growth rates in Glamorgan Spring Bay and Break O'Day experienced from 2000 to 2010.

Figure 13: DCAC Projected Rate of Decline/Growth for East Coast Tasmania Councils



Source: Tasmania Government, Demographic Change Advisory Council, 2008

¹ The State Government has not revised LGA level population projections since 2008.



4.3 Selected Characteristics

The following selected characteristics provide further insight into the nature of the regional population.

Table 4: Selected Characteristics of East Coast Tourism Region

Median age	2001	2006	2011
St Helens-Scamander	43	46	49
Bicheno-Triabunna	43	47	51
Tasmania	36	38	40
Australia	35	37	37
Median weekly household income			
St Helens-Scamander	446	557	658
Bicheno-Triabunna	531	657	754
Tasmania	622	800	947
Australia	784	1,029	1,230
Median household size			
St Helens-Scamander	2.3	2.2	2.1
Bicheno-Triabunna	2.2	2.2	2.1
Tasmania	2.5	2.4	2.4
Australia	2.6	2.6	2.6

Source: ABS, Census of Population and Housing, 2001 to 2011

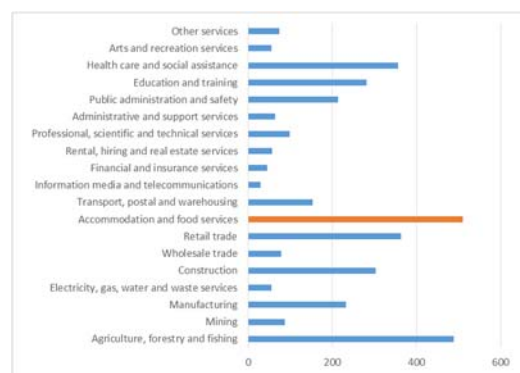
These characteristics show that the regional population is, on average, much older than the State or Australia as a whole. It has a smaller household size than the State and the nation. It has median incomes which are lower than the State and the nation. (Median incomes were between 69% and 80% of the State median in 2011. Comparative incomes have been reducing over the decade; that is, median incomes in the region have not been growing as fast as the rest of the State.)

These characteristics are typical of a community with high proportions of retirees and a small, relatively low paid employment base.

4.4 Industry

The chart below illustrates employment by industry of the residents of the East Coast Region. It shows that accommodation and food services – core tourism activities - are now the largest employer in the region.

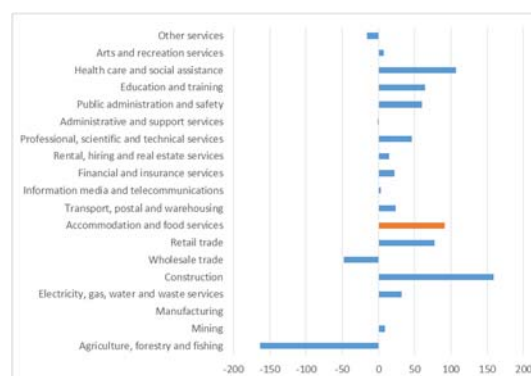
Figure 14: Employment by industry, East Coast Region residents, 2011



Source: ABS, Census of Population and Housing

The following chart shows the change in regional employment over the decade to 2011.

Figure 15: Change in industry of employment, East Coast Region, 2001 to 2011



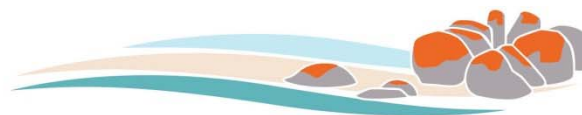
Source: ABS, Census of Population and Housing

The chart shows the absolute decline of primary industry in the Region – largely a result of the decline of the fishing fleet based in St Helens. It also shows strong growth in construction and in urban services, including accommodation and retailing.

These figures illustrate how the Region has become more and more dependent on tourism as its main industry.

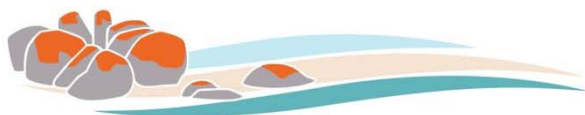
4.5 Community: Summary

- The population of the East Coast tourism region is approximately 10,800. The population has grown at 0.8% per year on average over the past decade. However, this average masks a decline in population over the last three years
- The official population forecasts are for continued growth in the region. However, these forecasts are dated and do not take into account the most recent demographic trends



- The regional population is, on average, older than that of Tasmania as a whole; has lower household incomes; and has smaller household sizes. This pattern is typical of holiday and retirement areas with relatively low paid industries
- With the decline of primary industries such as farming fishing and, especially, forestry, tourism has become the largest industry for the region over the past decade.

The socio-economics of the region demonstrate that the success of tourism is crucial to the well-being of regional residents.

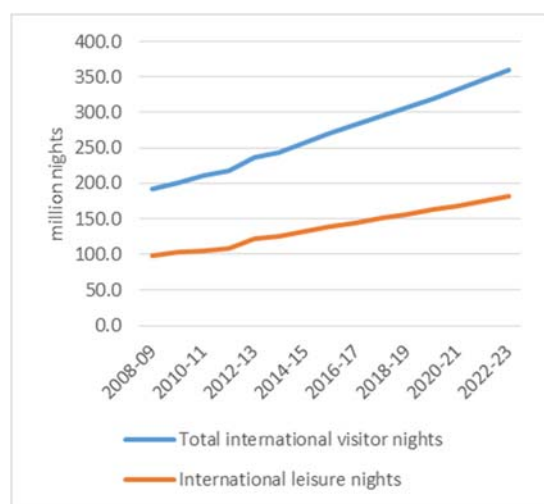


5 Tourism forecasts

5.1 International Visitation

Tourism Research Australia (TRA) prepares detailed forecasts of visitor growth over the next ten years. The forecast for growth in international visitor nights to Australia is shown below. (Forecasts should be treated with appropriate caution. Visitation is highly susceptible to changes in international conditions.)

Figure 16: Forecast change in international visitor nights, Australia, 2008-09 to 2022-23



Source: TRA, 2013

Average annual growth in international visitor nights in the ten years to 2022-23 is forecast to be 4.3%; growth in leisure nights is forecast to be 4.1% per year. In the leisure travel segment, growth is forecast to be most rapid and largest in the Chinese, Indian and Other Asian markets.

East Coast Tasmania has not been a strong destination for developing country visitors who tend to be organised into carefully packaged group holidays to well-known and heavily serviced destinations. However, there will be opportunities for the East Coast as part of smaller group holiday tours of Tasmania, and later for independent travellers. Small group holiday tours may provide a new lease of life for some of the larger hotels in the region that have seen little investment in recent years. For this segment, success will depend on being able to package group experiences that will appeal to an initially uncertain market.

Notwithstanding the rapid growth in the number of visitors to Australia from developing Asian countries, there will also be substantial growth from traditional leisure markets such as the UK and Europe. These markets have high levels of the kind of independent travellers who have found the East Coast an attractive location in the past.

The East Coast appeals to the older segments of the independent international travel market; people who come for the views, the moderate activities and the leisurely, laid back towns and deserted beaches. The area has not been a highlight of the younger backpackers circuit. Large-scale organised adventure activities (bungee-jumping, parachuting, motorboat activities, rafting etc) have not developed. There is scope for some organised tours of this sort but quieter, non-motorised adventures are likely to fit in best, including sailing, canoeing and rock-climbing. Diving and sport fishing are present and will appeal to a particular market, although, as noted earlier, growth in these activities is dependent on infrastructure provision.

In general, the East Coast will remain suited to independent travellers seeking relaxation and low key adventures that are close to nature. This kind of overall focus for the region as a whole will allow individual operators to create experiences for particular market segments.

5.2 Domestic Visitation

The forecast growth of domestic visitation is shown in the figure below.

Figure 17: Forecast growth in domestic visitor nights, Australia, 2008-09 to 2022-23

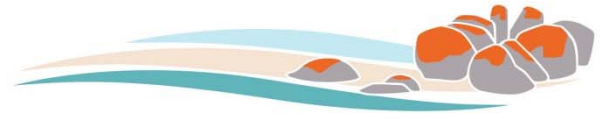


Source: TRA, 2013

Total visitor nights by domestic travellers is forecast to grow by 1.0% per year; the holiday segment is forecast to growth by 0.7% per year.

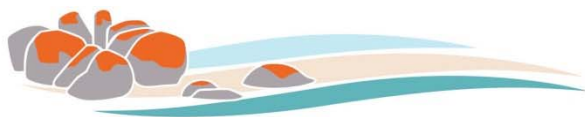
Within this overall forecast, visitation to particular regions is likely to vary widely. It is clear that domestic visitation has become increasingly diverse with more people seeking active, authentic, sustainable and special holidays.

These changes are likely to play to the advantages of the East Coast region. However, in order to attract more visitors and improve yield, the region will need to



build on its existing product to provide experiences of enduring quality. This means:

- Improving customer service, engagement and interpretation
- Broadening the offering of activities at key destinations
- Generating and disseminating clear messages about the regional offer



6 Key Challenges and Opportunities for Tourism

6.1 Visitation

The Global Financial Crisis in 2008 reset visitation to a lower level across most Australian regions. Fewer international visitors from traditional markets were able to afford to travel – and the high Australian dollar made Australia an expensive destination. On the other hand, more domestic travellers were able to afford to travel to international destinations as the purchasing power of the Australian dollar improved. Since 2010, domestic and international visitation to East Coast Tasmania² has been growing at or above the rates for Tasmania as a whole. However, visitation has not yet returned to pre-GFC levels.

The key tourism market in the region is holiday-makers, who account for 78% of all visitor nights. The number of people visiting friends and relatives is small because of the small (and shrinking) population. Likewise, business travellers are relatively few because of the small regional business sector. The distance of the region from the main cities (2.5 hours to Launceston and 2 hours to Hobart) also reduces the market for conferences, although there are some small-scale conference centres within the region.

Interstate and international holiday makers most often travel through the region on a larger tour of the State, although there is a small but growing number of visitors who visit Tasmania just for specific, internationally renowned attractions such as the Bay of Fires Walk, Freycinet National Park and Saffire Lodge. The average length of stay in the region is 2.8 nights (3.2 for intrastate visitors, 2.4 for interstate visitors and 2.7 for international visitors). This compares with an average of 5.1 nights for Tasmania as a whole.

A key challenge for tourism in the region is to extend the length of stay.

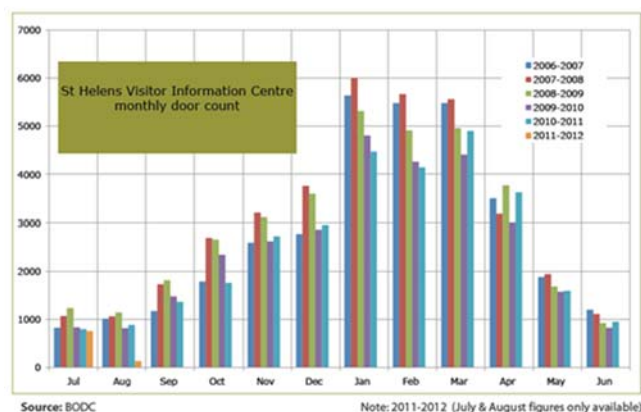
The length of stay and the expenditure per person per night are the two key determinants of the value of overnight tourism to the economy. The comparative spending per person is shown in the following chart which shows that the region is a little behind in the

spending categories for domestic visitors. This is mainly as a result of the type of accommodation used by domestic, especially Tasmanian, visitors, with a high proportion of people camping and staying in their own holiday homes.

Inexpensive secluded beach holidays are an important service provided by the East Coast region. However, in order to improve regional incomes, **the area needs to attract more visitors who are willing to pay more for their accommodation and to create demand for paying attractions.**

Visitation to the East Coast region, as with most beach holiday areas, is highly seasonal as shown in the following figures from the St Helens Visitor Information Centre.

Figure 18: Monthly visitor figures at the St Helens VIC, 2006-07 to 2011-12



Source: BODC

Note: 2011-2012 (July & August figures only available)

Source: Adam Saddler Consulting and Sara Lebski & Associates, 2013

It is difficult for many tourism operators to sustain year-round businesses. There is a **strong need to even out the annual visitation in order to improve the viability of tourism operations throughout the year and to build the regional product profile.**

² For statistical purposes, the East Coast Tasmania region includes the municipalities of Break O'Day and Glamorgan/Spring Bay which are covered by the East Coast Regional Tourism Organisation. This statistical region differs

from our study area somewhat. Our study area includes the small community of Musselroe in Dorset municipality but excludes those areas of Glamorgan/Spring Bay south of Swansea.



6.2 Tourism Product

6.2.1 Existing Product

The principal tourism products of the region are the opportunities to relax and play in a magnificent coastal landscape and its unspoilt hinterland. The commercial products include:

- Accommodation
- Conference centres
- Tours
- Regional produce outlets – wineries, oyster farms, fruit farms etc
- Cafés and restaurants
- Tourism retailing – souvenirs, galleries, bait and tackle shops etc
- Tourism services – real estate agents, hire facilities and transport.

Much of the existing commercial tourism product has been in place for some time. The GFC, on top of the perpetual difficulties of seasonality, has reduced the confidence of some existing tourism investors. This is evident in the lack of re-investment in some existing hotels and attractions in the region. **There is a need to create the conditions for improved rates of re-investment in existing product.**

Nevertheless there has been some recent investment, including in innovative accommodation and visitor services. The Saffire resort, for example, was opened in 2010 and has quickly established itself as one of Australia's best luxury lodges with an international clientele.

Figure 19: Saffire resort, Coles Bay - opened in 2010



Source: www.inhabit.com

The Saffire resort has substantial value to the region, including:

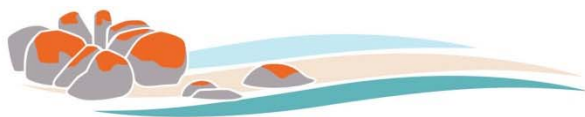
- Direct employment, creating around 50 full time jobs
- Development of local suppliers providing guided experiences and specialist food items
- Infrastructure support, including drought-proofing Coles Bay
- Promotion of the East Coast experience to a national and international audience.

The value of the East Coast tourism attributes are well recognised nationally. Australian Traveller magazine recently published a list of the top 100 "greatest holidays of Australia". East Coast Tasmania had four of the top 20 holidays – more than any other region (see below).

The top 20 Greatest Holidays of Australia	
1:	Cruise the world's oldest coastline WA
2:	Road trip the East Coast Escape Tas
3:	Do 'The Lap'
4:	See Kakadu NT
5:	Book into Saffire Freycinet Tas
6:	Take a foodie break in the Margaret River Region WA
7:	Escape to Lord Howe Island NSW
8:	Road trip the Great Ocean Road Vic
9:	Have a gourmet Barossa weekend SA
10:	Stay at qualia. Just once in your life Qld
11:	go straight to Lizard Island afterwards Qld
12:	Swim the Other Reef WA
Tied – 13:	Walk The Freycinet Experience Tas
Tied – 13:	Dive the Barrier Reef Qld
15:	Trip to the tip, from Cairns to Cape York Qld
16:	Become a Firewalker Tas
17:	Cross the Savannah Way Qld to NT to WA
18:	See the wet in the Top End NT
19:	Escape to the Rowley Shoals WA
20:	Spend a weekend dining in Melbourne's restaurants

Source: *Australian Traveller*, 11 April 2014

Despite this recognition of the regional tourism highlights, **some parts of the region have little commercial product**. Commercial accommodation on the coast north of Binalong Bay, for example, is almost

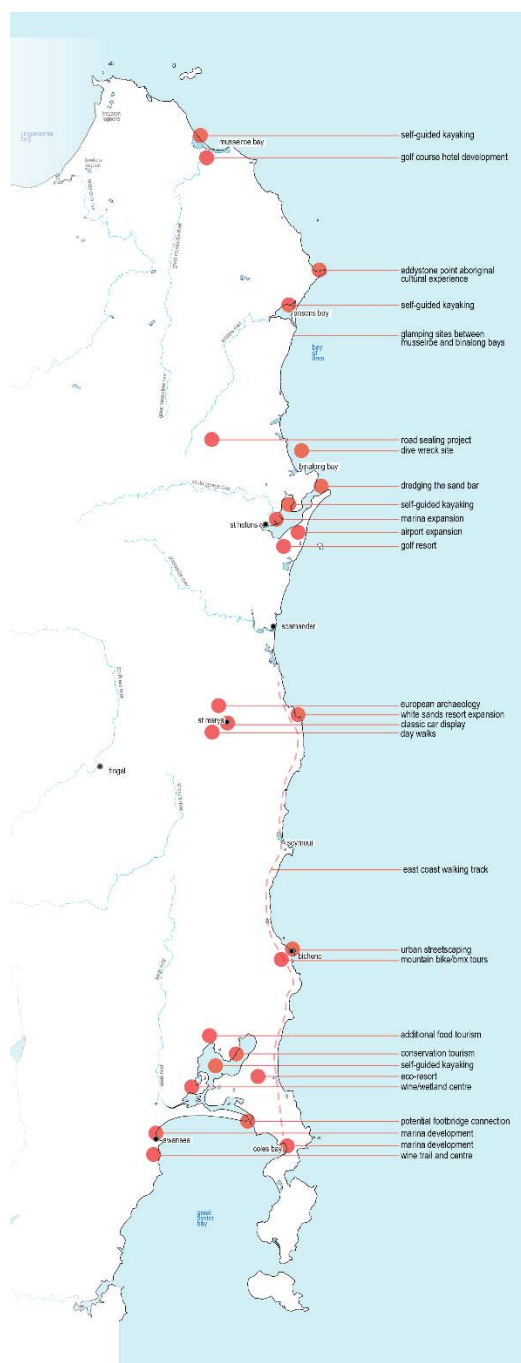


non-existent, although there are two small townships. In addition, it is clear that many of the towns in the region are not capitalising on their tourism potential.

6.2.2 Potential Product

The scope for further tourism product has been well-documented in the East Coast Regional Destination Management Plan (The Stafford Group, 2013). Further potential developments have been noted for this present study by Council officers from their discussions with development proponents and by the consultants from previous experience. These potential developments (commercial activities and tourism infrastructure) have been mapped in the adjacent figure.

Figure 20: Potential tourism developments in the East Coast Region



Source: Break O'Day and Glamorgan Spring Bay Councils; Tim Nott



6.2.3 Accommodation

The density of the existing commercial accommodation offering is shown in the following figure.

Figure 21: Density of commercial accommodation, East Coast Study Area



Source: Geografia

The key towns of Coles Bay, Bicheno, Swansea and St Helens clearly have the majority of commercial accommodation, with smaller concentrations in St Marys, Scamander and Binalong Bay (mainly holiday lets).

The study area has a range of accommodation from the nation's most luxurious resort to free camping sites. However, a number of observations and opportunities have been noted in various reports including the East Coast Destination Management Plan (The Stafford Group, 2013):

- A significant part of the most visible commercial hotel offering in the region is tired and has not benefited from recent investment
- There is reportedly a lack of holiday homes to rent in some locations, particularly at the luxury end of the market
- There are no cabins in Parks and Reserves (see subsequent sections of this report)
- There is almost no commercial accommodation on the coast north of Binalong Bay to enable casual visitors to stay at the Bay of Fires or Mount William NP.

The strong seasonality of visitation to the area is likely to make investment in commercial accommodation difficult. Nevertheless, the accommodation sector will need to respond with more supply in order to support any strategy to create year-round activities. This response could include encouragement of commercial holiday home lettings in the off-season and in places where commercial lettings are not currently available. There may also be scope for more significant hotel accommodation on private land in the Bay of Fires area. This may require the resolution of infrastructure issues (water and sewerage).



6.3 Tourism Infrastructure

6.3.1 Funding

The tourism industry requires excellent infrastructure to maximise visitation, with infrastructure ranging from roads and reticulated services to viewing platforms and interpretation signs. Most infrastructure is provided or facilitated by the public sector. In an area such as the East Coast, with a relatively small resident population but a large visitor population, funding for infrastructure is a key issue. Local residents cannot afford to fund infrastructure for all the visitors and so resources must be captured from outside – either from other levels of Government or from the visitors themselves.

Example: Camping facilities

In most of the public lands of the East Coast, camping is free. This has been to the benefit of Tasmanians and regular visitors from the mainland and some international backpackers. Because camping is free the costs of maintaining the sites fall on the Tasmanian tax-payer (and, to a small extent, on visitors through the collection of National Park entry fees). More resources are required to improve the facilities at camp sites to meet the needs of different market segments, to interpret the sites more effectively, and to better manage environmental impacts.

There has reportedly been some resistance to charging visitors for services such as the introduction of camping fees in Parks and public reserves. However, it has become a principle of public policy that, unless there are over-riding equity and access issues, the beneficiaries of public investment should pay for the services they receive. In the case of public infrastructure to support tourism, the beneficiaries include the visitors, the local community (which benefits from improved services and from visitor spending) and the wider Australian/Tasmanian community (which benefits from the economic activity generated especially by international/interstate visitors). This approach requires charging visitors but also justifies spending by local Councils and by State and Federal Governments, particularly where the infrastructure is expected to service or attract interstate and international visitors.

The Parks and Wildlife Service, which manages public reserves, appears likely to move towards a more holistic management of the network of camping sites than hitherto. This will allow better differentiation of sites to meet the needs of different market segments, and for visitors to pay accordingly. This could result, for example, in a four tier camping site structure:

- Free camping in designated areas on a first-come-first-served basis
- Bookable basic camping sites with access to toilets and water, with relatively low fees
- Bookable powered and serviced sites suitable for recreational vehicles, caravans and family camping, with low-to-moderate fees
- Bookable low-impact cabins in secluded and picturesque areas with all services, with high fees.

This new regime will require the selection of sites for change, provision of appropriate services at sites, and development of management systems for booking and monitoring the new arrangements. It seems likely that this would take some time to implement. However, the value to tourism would be to create a differentiated product suited to particular market segments; promotion of sites through booking arrangements (via the web and at Park offices); and the improvement of camping services through the creation of an income stream. The change would be likely to attract more interstate and international visitors who may not be aware of the sites under the current arrangements.

6.3.2 Improving Access

Improving access to and within a region nearly always results in increased visitation. Improving access means reducing the costs of travel, including travel time. Parts of the region are difficult to access. It may be argued that poor access has resulted in the retention of wild and unspoilt areas which are a large part of the charm of the region, especially for local residents. On the other hand, most of the wild and unspoilt areas are protected and managed through the public parks and reserves system, and there is no reason why these areas should lose their wilderness values even if some nodes generate greater visitation by people from interstate or international origins.

Example: Road Infrastructure

The Tasmanian Government has recently pledged \$500,000 over two years to promote the “Great Eastern Drive” – the A3 between Orford and St Helens – as a touring route for visitors. Hopefully, there will also be funding for road improvements, including safety measures, signage and viewing areas.

There is the potential to extend the Great Eastern Drive to Musselroe Bay via the C483 and to connect with north coast routes. This would require sealing the existing roads and with sealed connections to the coast at strategic locations (eg Ansons Bay and Musselroe Bay) such an investment could open up substantial



areas of the coast for extra visitation. Sealed roads are important for international and interstate travellers in hire cars, since many hire car companies do not allow their cars to be driven on gravel roads. However, the economic, social and environmental costs and benefits would need to be assessed thoroughly and it may be that such investment is a long term prospect.

Figure 22: Viewing areas in need of investment

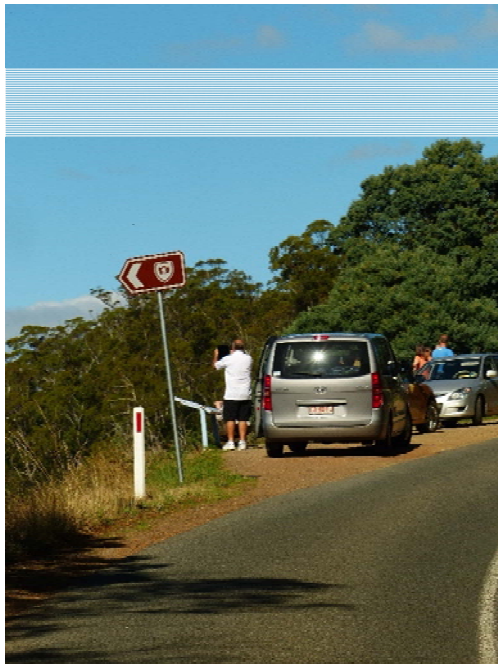
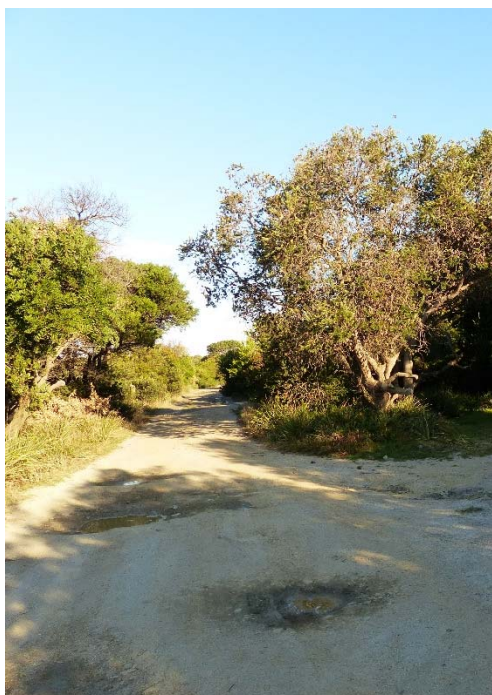


Figure 23: Gravel roads deter hire cars



Example: Access for boats

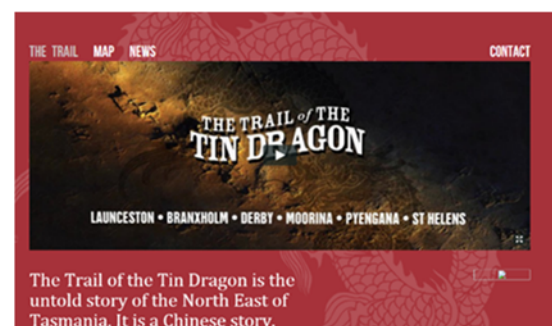
St Helens is known for its fishing fleet and in times past has had a strong sport fishing sector. However, the mouth of St George's Bay is silting up and the channel from the Bay to the ocean has become dangerous. Creating a reliable opening of the Bay would be an important infrastructure project for tourism in the northern part of the region. Fishing fleets and the working harbours that support them have an enduring fascination for visitors (especially as there have become fewer and fewer working harbours over the years). They generate interest and bring fresh seafood that provides the potential for unique cafes and restaurants. The sport fishing sector also has proven potential as a high value visitor segment. Safe entry to the Bay could reopen St Helens as a destination for touring cruisers and yachts, with potential for expanded marinas and harbour-side development.

The cost of making the entry to the Bay safe as well as needed wharf works at St Helens has been estimated at \$24.3 million (Dr Robert Noakes, 2014). The value of the fishing fleet has been estimated at \$305 million over 20 years. The investment would have a positive benefit-cost ratio (around 2.56 according to Dr Noakes). Without the works, access to the Bay will close by 2017 and the fishing fleet will cease operation.

6.3.3 Signage and Interpretation

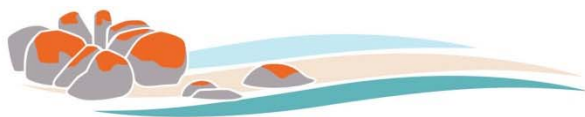
The East Coast region has many stories to share with visitors – about the natural environment, about aboriginal heritage and the settler communities. There has been some interpretation along the coast and there are some themed discovery trails such as the trail of the Tin Dragon between Launceston and St Helens which tells the story of tin-mining and the Chinese community in north east Tasmania.

Figure 24: The Trail of the Tin Dragon



Source: www.trailofthetindragon.com.au

For the most part, the existing interpretation is patchy, that is, it is not present in all areas and reflects a



number of different signage strategies over the past 15 years or so. However, PWS has now developed common signage for many of the reserves which is attractive and provides interpretation of natural and cultural heritage as well as management messages. There is further potential to broaden the use of this signage to other parks and reserves in the region and for its use by other agencies in order to provide consistency in the branding of the East Coast as a whole.

Figure 25: New PWS interpretive signage for East Coast reserves



Source: PWS

There is also potential for more innovative interpretation which can tell linked stories that draw people through the region causing them to explore and linger. The PWS is already using new media (podcasts, Youtube etc) extensively to provide interpretation. This could be extended to East Coast attractions. There may also be the opportunity to create trails that cater to specialist interests. This could include self-guided bird-watching trails; canoe trails with interpretation boards or listening posts in selected lakes, bays and lagoons; and dive trails in marine reserves.

6.3.4 Walking Infrastructure

Walking to experience the natural environment is perhaps the single biggest recreational activity undertaken by tourists in Tasmania and is one the

State's key competitive strengths. The State has a wide range of walking experiences from multi-day treks to luxury guided tours and easy strolls, including:

- The Overland Track – a trekking experience of world renown in the Tasmanian uplands
- Other multi-day walking trails such as the South Coast Track, the Walls of Jerusalem and Frenchman's Cap, for experienced walkers
- The Freycinet Experience, Bay of Fires and Maria Island walks – guided coastal walks staying in exclusive lodges
- Day walking trails and short walks, with many of these promoted by the PWS through the 60 Great Short Walks.

In addition to these walks, the State and Australian Governments are investing \$25-\$30 million in developing the Three Capes Walk on the Tasman Peninsula. This will be a hut-based walk providing a wild coastal experience including several water crossings. The walk will need to be booked and it is intended that, as with the Overland Track, the walk can be guided or self-guided.

Whilst the study area for this project has two of the State's key luxury guided walks and a number of short walks around Freycinet, there are no extensive or promoted self-guided coastal walks north of Bicheno. In many cases local people walk the coastal tracks and on the beach but these walks are not serviced and could not be promoted to visitors as a reason to visit.

The only multi-day walk in the Douglas-Apsley National Park is the Leeaberra Track. Unfortunately, this track has reportedly not been well-maintained and there are no facilities at its camp sites.

So, while walking is a competitive advantage for Tasmania, and the East Coast has several iconic walks, most walkers are not catered for north of Freycinet. There is a significant opportunity to develop walking tracks that would constitute a major coastal walk. This opportunity has been recognised in a scoping study conducted for Jan Cameron by Tasmanian Land Conservancy (2012).

This study found that:

Tasmania is known as a walking destination for its wilderness trails but does not offer step-on step-off experiences such as those seen in Britain, Europe and America. Step-on Step-off is more attractive to an older and less adventurous and has the advantage of integration with local business and economy. It has strong potential for development in Tasmania.



The coast north and south of Bicheno has beautiful and undeveloped beaches which could be promoted as a walk.

(Tasmania Land Conservancy, 2012)

Whilst the scoping study advocated a walk between Coles Bay and Little Beach, it would be possible to develop a walk along the whole length of the coast of the study area – around 200km or so. In comparison the Great Ocean Walk along Victoria's south coast is approximately 104km (eight days / seven nights). For most walkers, this would be a "choose your own adventure" exercise from short stroll to five night walk, although it should be possible to walk the whole coast. Such a walk would keep many people coming back to complete further sections of the track. Accommodation options should include the possibility of walking significant sections using commercial built accommodation such as motels or bed and breakfast establishments (or park lodges/huts), removing the need to carry camping and cooking gear.

The infrastructure required for such a walk would include:

- The walking trail itself – although existing tracks and beach through Parks and Reserves would be used in many sections, there would still be a need to create linking trails and to negotiate access through private land and State Forest
- Walkers camp sites/cabins - existing sites could be used in many places but would need to be serviced with water and toilets and provided every 10km or so (although commercial accommodation should be part of the mix)
- Signs and interpretation – a well-designed track sign would be vital and would provide promotion of the track throughout the region; interpretation could be increasingly provided through electronic means
- Campsite booking facility – unless this was provided as part of a more general reorganisation of PWS camping fees and charges.

The route of an East Coast Trail could include an inland detour between Bicheno and St Marys, taking in the Douglas Apsley NP and St Patrick's Head to provide magnificent views of the coast and some variation in the walk conditions.

In some sections, the track could serve a dual purpose as a recreation link between settlements. In these sections, the track could be robust enough to provide a cycle-way. This could attract additional sources of

funding. An example of where this may be appropriate is between Falmouth and Scamander.

There is no doubt that a long distance path of this sort will face significant challenges in order to minimise environmental and cultural impacts. Nevertheless, the East Coast Trail would have a number of potential advantages for the region, providing:

- A linking and unifying piece of infrastructure which would encourage the provision of other services
- A facility that be used by local residents and will attract both Tasmanians and higher spending interstate and international visitors
- An attraction that will extend the length of stay within the region.

The cost of the trail, whilst substantially less per kilometre than the Three Capes Walk currently under development, would nevertheless be significant. The Tasmanian Land Conservancy estimated the cost of the 66km Little Beach to Coles Bay section of the track at \$12 million (although this cost appears to exclude signage and additional camping facilities). This may be a medium to long term project which could be developed in stages given an agreed vision and promotional material to which the various parties involved - PWS, Councils – could stick to.



6.5 Investment Approvals

Investment is crucial for the development of tourism in the region. It is required to develop, maintain and renew visitor services, both public and private. There is a perception amongst some sections of the community that the approvals process can be unnecessarily time-consuming and uncertain. It is sometimes the case that the approvals process can be blamed for delays that are more to do with financing, market development or management factors. Nevertheless, there may well be opportunities to improve the process to achieve appropriate controls and sustainable development.

While tourism development on the East Coast can be underpinned by government investment, the majority of the economic benefits will be through private investment decisions. This may be a small expansion of an existing business or a major new development. Either way, having made the decision to invest, a project proponent must then negotiate the development approvals regime. The following sections describes the existing approvals regime and highlights issues raised by several case studies.

6.5.1 Existing Approvals Regime

The existing approvals regime is relatively complex. When a new development is proposed, there are a number of variables which will inform the process for approval. These can be quite complex and sites in areas of environmental sensitivities often require approval under a range of Acts (see figure 27).

Planning in the Study Area is controlled primarily by the relevant local Council. This is done through three main mechanisms; the planning scheme, associated zoning of land and the overlay controls which are associated with particular 'codes' within the scheme. In some cases these are easy to locate and consider online but in others it can be difficult to determine the particular controls which apply to a specific site. It is understood that search functions which allow users to access relevant information about a specific site and / or planning scheme will be developed alongside the new planning schemes by the Tasmanian Planning Commission. This should improve the current situation.

It is worth also noting that planning schemes within Tasmania are currently in 'interim' form as a reformation to ensure greater consistency across planning schemes is undertaken in the State which add to the level of uncertainty for investors.

If the proposed use / development is on private land and is allowed under the current zoning controls, the process will generally involve Council undertaking the

main assessment. This process is shown in figure 28 on the following page. If it is considered that there may be environmental impacts as a result of the development, it is also referred to the Environmental Protection Agency (EPA) for consideration (these are considered Level 2 activities). In determining whether an activity is a Level 1 or Level 2, reference must be made to Schedule 2 of the *Environmental Management and Pollution Control Act 1994* which lists these. Different requirements exist for different activities within 'Level 2' which influences whether an Environmental Effects Report (EER) or a Development Proposal and Environmental Management Plan (DPEMP) are required. Under the EPA process public consultation is required.

While the relevant planning scheme is required to consider them, it is worth also noting a series of higher level strategies which influence decision making, including the relevant Regional Plans, the State policy on *Water Quality Management 1997*, and particularly the *State Coastal Policy 1996* which outlines a number of high level objectives for the management of coastal areas and their development.

The complexities of planning along the coast are highlighted in the figure below which identifies relevant legislation that may influence assessment processes.

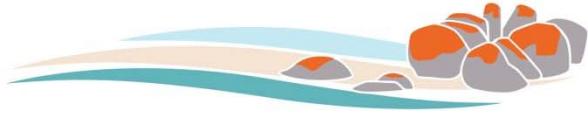
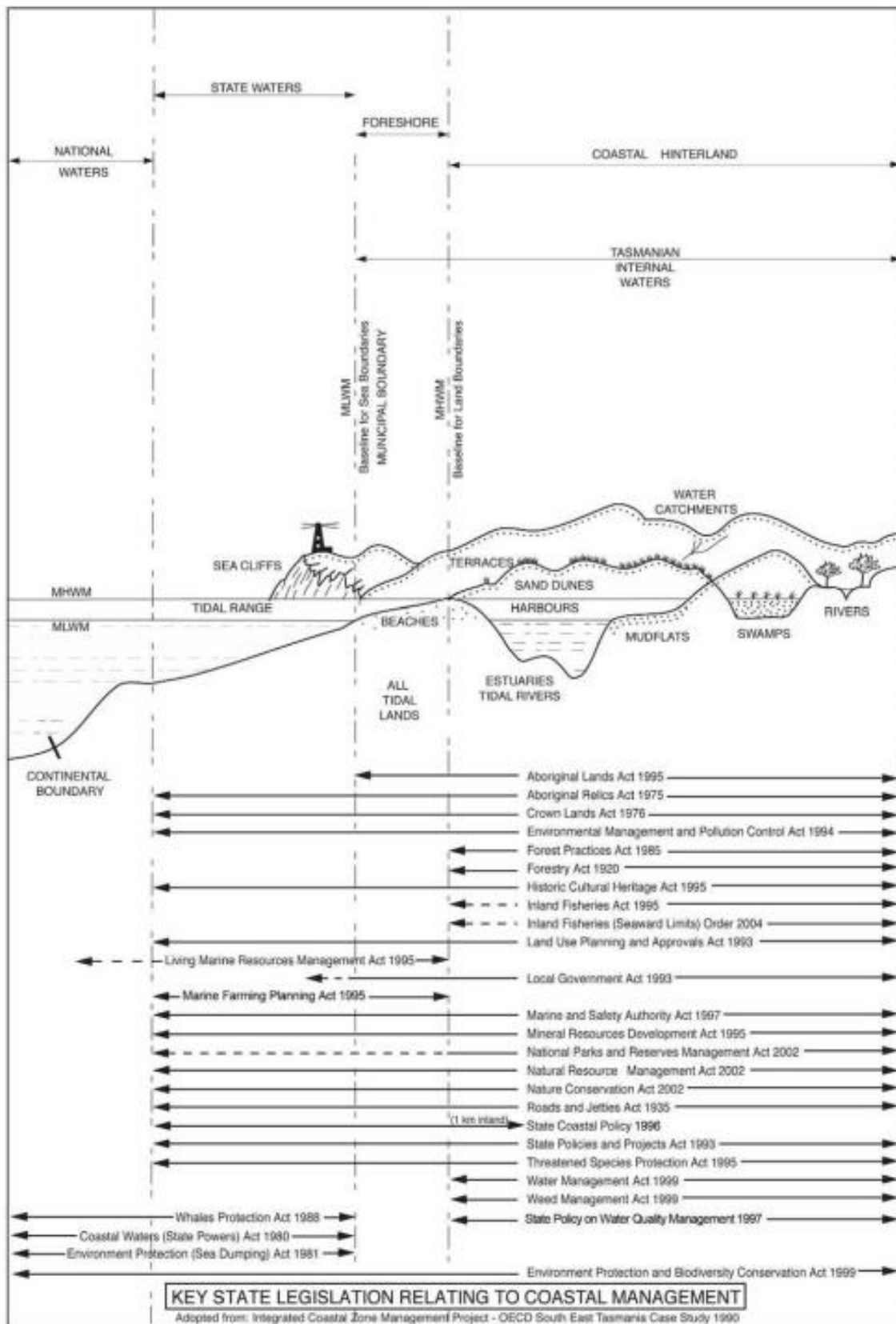


Figure 26: legislation in coastal areas



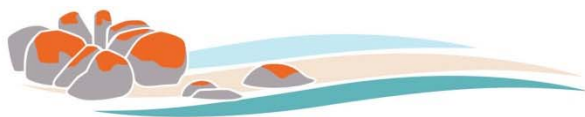
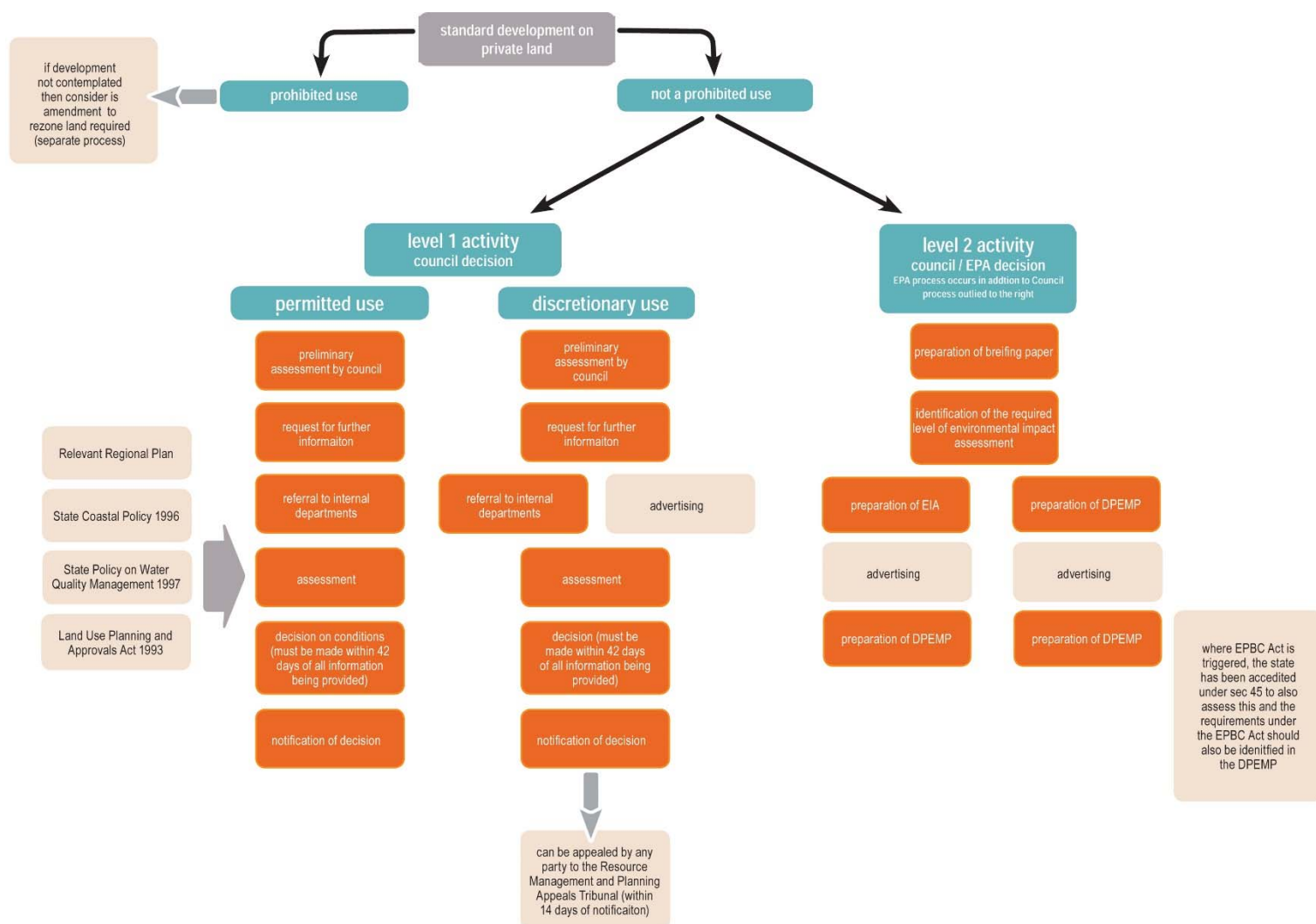


Figure 27: assessment process of development on private land



EPA = Environmental Protection Agency

TPC = Tasmanian Planning Commission

DPEMP = Development Proposal and Environmental Management Plan

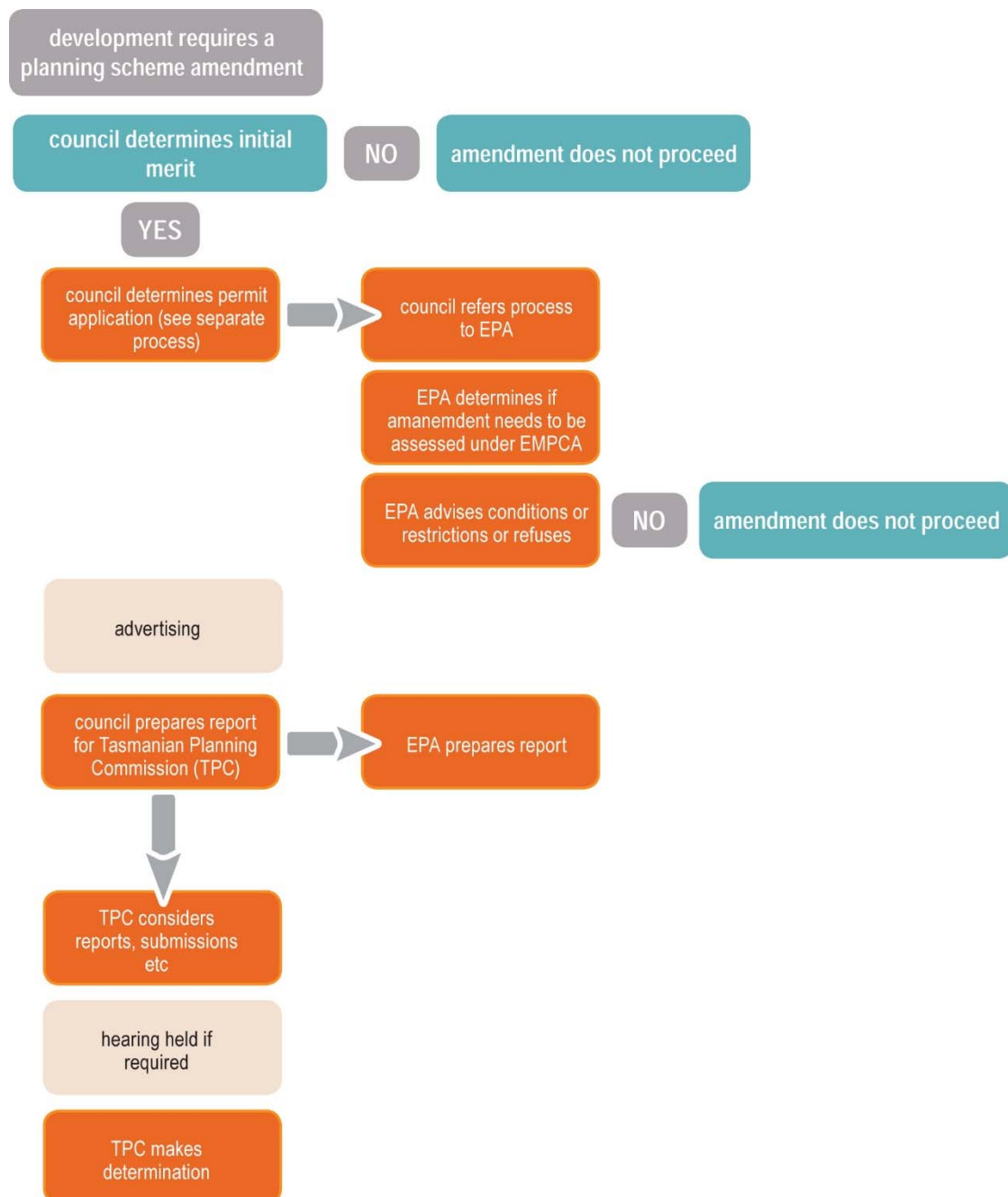
EER = Environmental Impact Assessment

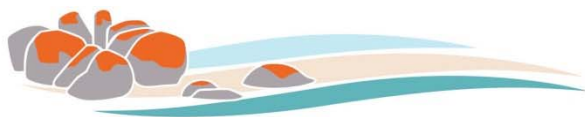
EMPCA = Environmental Management and Pollution Control Act



If the proposed investment is not supported by the current zoning of the land a rezoning can be pursued to facilitate a development. This can be undertaken in conjunction with a permit application but will be determined by State Government through the Tasmanian Planning Commission, with input for the relevant Local Government. This process is outlined below. It is important to note that while interim planning schemes are in place it is understood that no rezoning will be supported by the State Government.

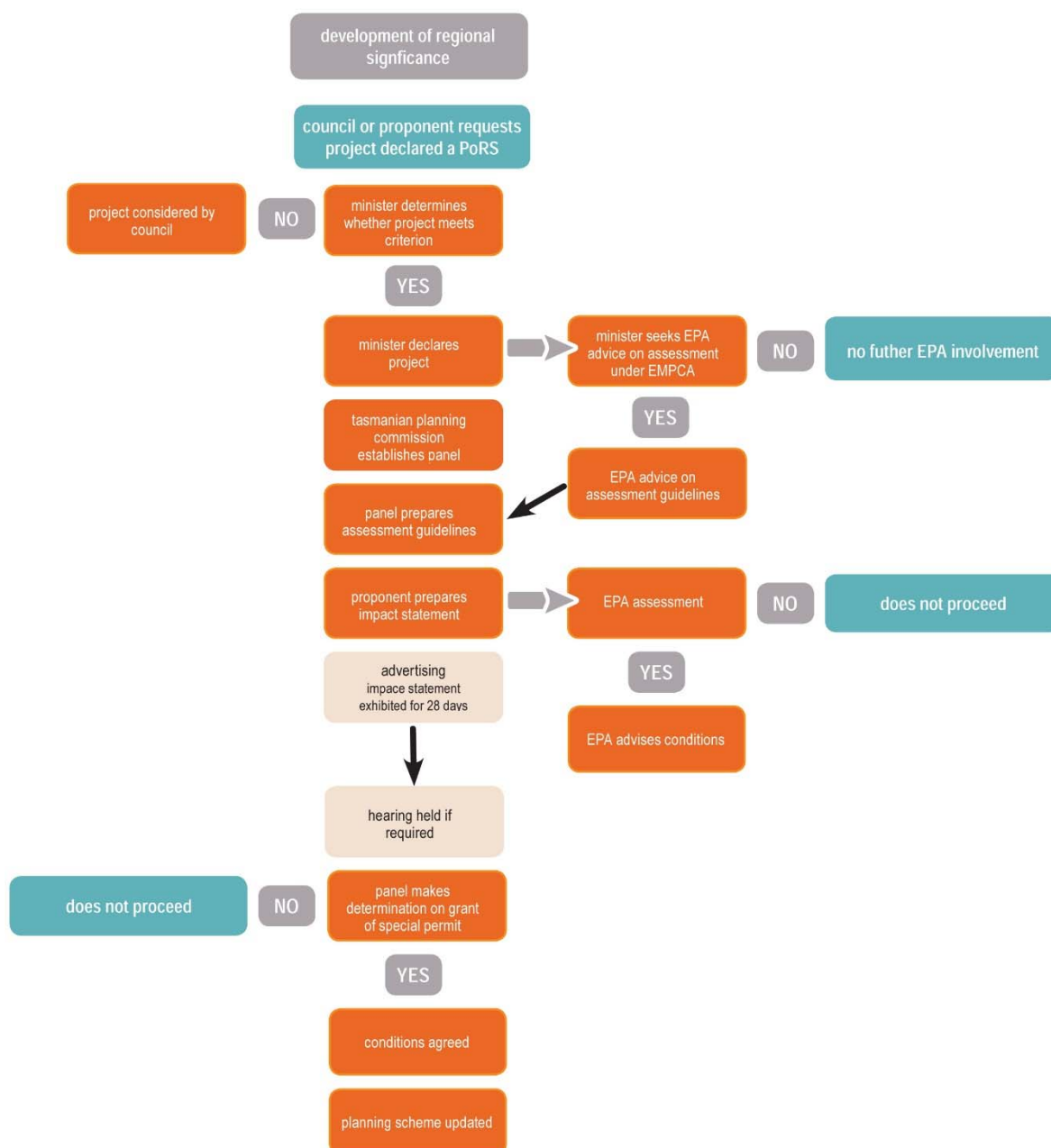
Figure 28: process for amendment of a planning scheme if rezoning is required





If a project is considered to be of regional significance there is a separate planning process which is undertaken by the Tasmanian Planning Commission via a Development Assessment Panel rather than the local Council. This removes some local influence but allows for higher level consideration of issues which may affect wider areas. The Panel has the power to amend the planning scheme to ensure consistency. Alternatively, an additional process exists for assessment of projects identified as being of State significant which are then assessed under the *State Policies and Projects Act 1993* rather than the *Land Use Planning and Approvals Act 1993*.

Figure 29: assessment process for regionally significant projects





In addition, there is a parallel process which needs to be followed to achieve approval from Parks and Wildlife Services where development is proposed on public land which is outlined in the following section

6.5.2 Investment in Parks

Investment in Parks and Reserves (including most of the foreshore in the region) is needed to develop visitor services, from footpaths and signs to campsites and roofed accommodation. Most of this investment is public although the Parks and Wildlife Service (PWS) can call for expressions of interest for the provision of particular services from the private sector and it can also entertain suggestions from private firms for new services that fit with its overall management objectives.

Nevertheless, there is at least the perception that, in the recent past, both public and private investment in Parks and Reserves has been problematic even where requested by the land manager:

- Extensive costs have been incurred in planning and organising projects that have been disallowed at the last minute because of environmental issues which should have been picked up at the outset.
- The length of time taken for the approvals process appears to be beyond what should be required for a thorough assessment of the issues.

The seven-year process to invest in a simple viewing platform at the Bay of Fires is often cited as an example of the issues that can arise when management and community objectives are not in alignment (see case study 1 below).

Certainly there are strong community views about investment in Parks and Reserves, as revealed in the consultation for site planning at the Bay of Fires:

The consultation program revealed there are strong and opposing views within the local community about the use, protection and management of the Bay of Fires. Some traditional users consider there is no need for further management controls and that users should be allowed to access and use any part of the Bay of Fires.

Others users expressed major concern with the unacceptable level of impacts on the natural and cultural values of the area that were now threatening the Bay of Fires experience. The majority of those consulted considered tourism was beneficial to the local area whereas a few people opposed the promotion of tourism use all together.

The proposal for a Bay of Fires National Park has further fragmented the views within the community. The common views were that the Bay of Fires was a beautiful place and that the natural and cultural values need better management and maintenance. (Inspired Place, 2011)

The fact that there is no approved management plan for the Bay of Fires or other coastal reserves (or even some National Parks such as Mount William) means that there has been no resolution to community concerns.

While development in these coastal areas needs to go through the same planning process for investment on private land outlined in the preceding sections, there are additional approval processes which need to be considered when development is proposed on public reserve land. In addition to any negotiations around the leasing of public land, the PWS also has their own internal assessment process for development. Their consent must be gained before any Council can consider applications on public land.

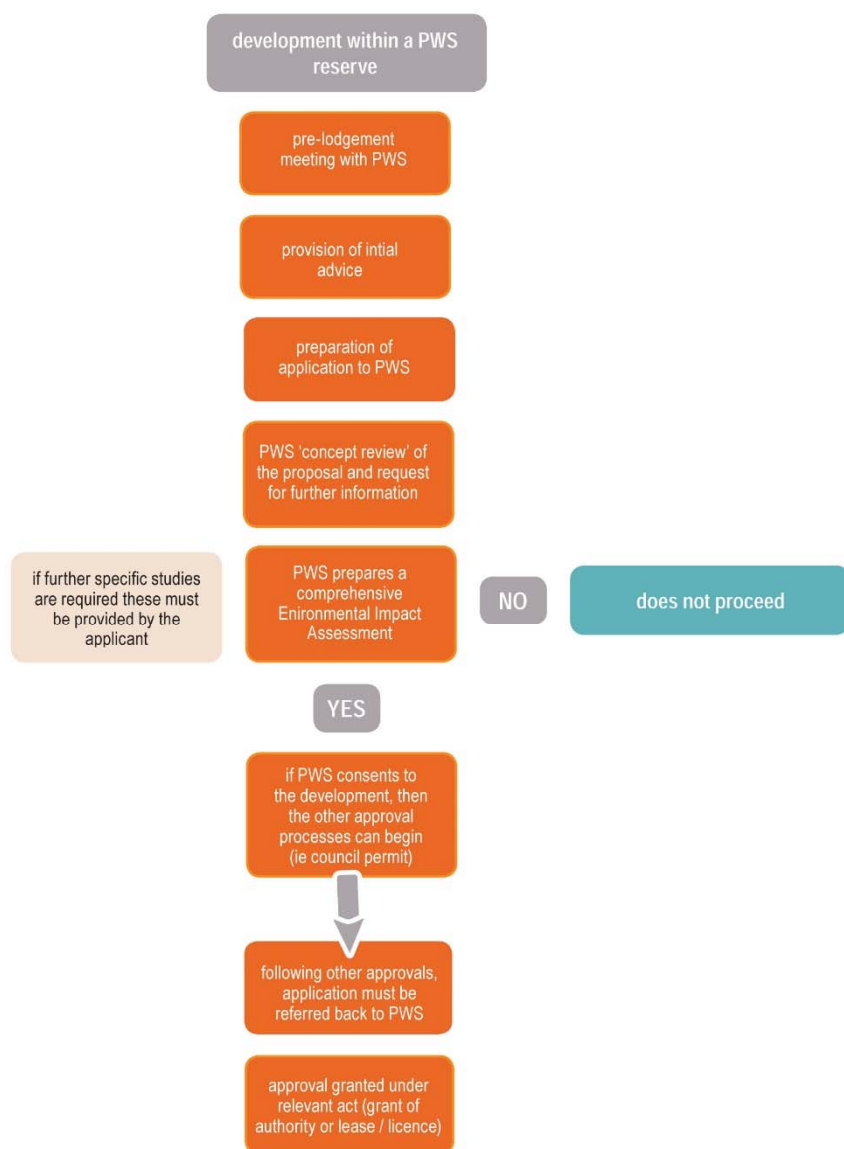
This system is known as the Reserve Activity Assessment (RAA). As with other environmental approvals which may be required through the planning process, this system has different levels (four). The process of determining the level of assessment required considers the values, the potential impact and the likely controls, but also considers the social impacts and likely stakeholder views.

PWS provides RAA forms for proponents to fill in. For Level 1, the form is relatively straightforward, but for Levels 2 – 4 the document is more complex. At the initial 'concept review' stage (see figure 31) conflicts with existing plans or strategies could lead to refusal prior to any strategic consideration at a Council or other planning level.

The overall process for the PWS approval is outlined in the figure on the following page. While it does not specifically identify consultation, for Levels 2, 3 and 4 PWS indicates a level of engagement would be required.



Figure 30: approval process for development on reserve land



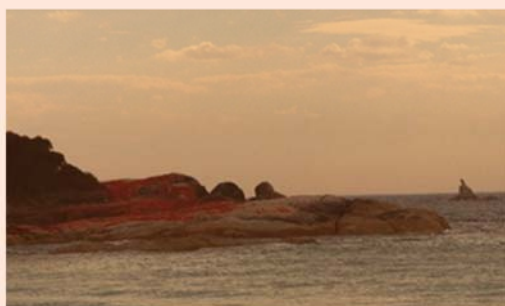


6.6 case study: bay of fires lookout

Proposal: To develop a location for the interpretation of the Bay of Fires, including signage and a lookout, as proposed in the St Helens Tourism Precinct Plan approved by Break O'Day Council in 2007.

Location: Originally proposed for a site near Sloop Rock, the lookout was eventually developed on the foreshore in Binalong Bay township with some interpretative signage installed at camp sites such as Cosy Corner and Swimcart Beach.

Figure 31: Sloop Rock, Bay of Fires



Development history:

- 2007 - The St Helens Tourism Precinct Development Plan (Inspiring Place, 2007) recommends provision of interpretation of the Bay of Fires adjacent to Sloop Rock, with an emphasis on the strong Aboriginal relationship with the area and rehabilitation from overuse, development of viewing platforms and signage to,

"provide visitors with the essence of the Bay of Fires experience – seeing a beautiful coastline with aqua coloured water, orange lichen on granite boulders and white sandy beaches, whilst feeling the sense of remoteness and being away from the developed world, and to experience the freedom of the casual East Coast lifestyle" (Inspiring Place, 2007)
- October 2007 - Council resolves to adopt the plan including the recommendation for interpretation of the Bay of Fires
- December 2007 – Council appoints a committee to drive the implementation of the interpretation facilities, including local community, business and PWS members
- April 2008 – State Government grants \$150,000 towards implementation of the interpretation site
- Aboriginal heritage report commissioned to review the Sloop Rock site
- December 2008 – Aboriginal heritage report recommends that new infrastructure should not be put at the site because of the Aboriginal heritage that was evident around the site; Council recommends a new site on the foreshore at the Binalong Bay township with some interpretive signage at Sloop Rock, Humbug Point, Swimcart Beach and The Gardens; Council writes to persuade the Minister to transfer the development funds to the new site
- March 2009 – Minister approves use of grant for new site
- June 2009 – Inspiring Place deliver conceptual site plan in response to a brief from the reference group; the plan is rejected by Council and the Binalong Bay Ratepayers Association as generating too large an impact on the foreshore reserve and the township
- Spring 2009 – A second consultant delivers an alternative plan for Council and, although this receives no adverse comment from the community, Council believes that it will generate too large an impact on the foreshore reserve
- 2012 – a revised design for the works is approved by Council for a single viewing platform and a small car-park near Bayview Avenue at Binalong Bay; Council proceeds to commission ecological and heritage reports to support a Reserve Activity Assessment, required by the PWS for development to proceed; however the Aboriginal heritage assessment is caught up in a State-wide dispute and is delayed for 12 months
- April 2013 – Council finally approves the project
- May 2013 – An appeal is made against the Council decision and the project proceeds to the Planning Tribunal
- August 2013 – The Tribunal finds in favour of the Council
- January 2014 – Viewing platform opens

In total it took six years to implement a minor piece of coastal infrastructure which Council initially approved.

Learnings

1. Developing visitor infrastructure on foreshore reserves can be highly contentious and protracted even where, as in this case, there is a strategic plan approved by Council. A key fault in the process was that the Aboriginal community was not consulted about the original site. It is **clearly necessary to take the biological and cultural**



heritage factors into account when planning change in sensitive areas.

2. To an outsider, the original plan for the interpretation site at Binalong Bay appears relatively low key compared with other coastal interpretation areas – no buildings are proposed and structures comprise low walls, seating, boardwalks and signage as well as a slightly larger car-park than existed at the time of the plan. However, this was clearly unacceptable to the local community which deemed the design an overdevelopment of the site. ***Design of coastal infrastructure, particularly in or close to settlements, needs to be undertaken in conjunction with the community*** and with a clear common view of the purpose of the development. This needs to be taken into account when costing infrastructure design.
3. The Reserve Activity Assessment is essentially a planning permit process. There ***may be scope for the RAA process to be more helpful,*** particularly where strategic planning has already identified areas for development.
4. The Parks and Wildlife Service is responsible for development in the foreshore but has not developed a management plan for the area. In the absence of a management plan, the area is managed according to the very generic Tasmanian Reserve Management Code of Practice. Visitor services are being implemented as resources become available, according to the site plan for the area developed by consultants Inspiring Place in 2011. ***A detailed management plan would have input from stakeholders and clarify the development priorities for the area.*** The management plan should identify the biological and heritage attributes that can guide the nature and location of future development. Where possible, the recommendations of management plans should give performance guidelines; that is, they should say, “It is appropriate to develop in this location so long as the following criteria can be met – “

Figure 32: Lookout, Binalong Bay



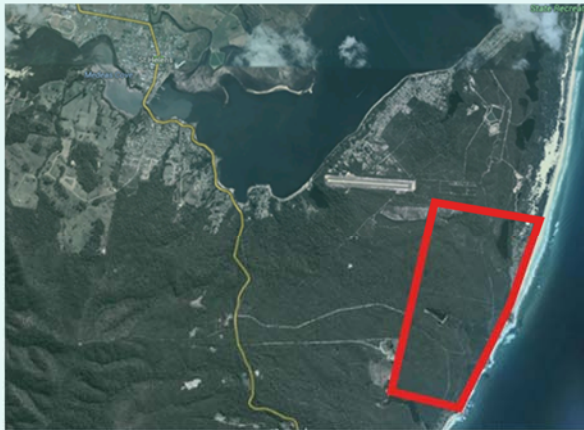


6.7 case study: piano cove

Proposal: Coastal golf course near St Helens with club house, Peppers hotel and smaller "birdwatchers" hotel overlooking the Jock's Lagoon Ramsar site.

Site: The general location of the development site is illustrated in the aerial photo below

Figure 33: Piano Cove proposed development site



Source: base photo from Google maps

Development History: The site has been identified in Council's structure plans and its tourism strategy as a potential tourism development site. The owner of the site was keen to develop the site for golf course and hotel. Council urged the proponent to submit a preliminary planning application prior to the introduction of the Interim Planning Scheme in June 2013. This was done, even though the development plans were not yet finalised, because the new zoning regulations under the Interim Planning Scheme would not have allowed the development on that site and rezoning was prohibited until the introduction of the final planning scheme. Council can deal with the application under the old planning scheme.

In trying to progress the application, Council has asked for information about the remaining planning issues including an update of the aboriginal heritage study, a natural heritage study to determine whether approvals are required from the Threatened Species Unit at DPI, and infrastructure assessments of water supply and treatment. The area has previously been identified as containing habitat of the endangered New Holland Mouse and several species of rare orchid.

The proponent is currently reviewing the market prior to making the outlays to undertake the required heritage and infrastructure studies.

In the meantime, the change of State Government has pushed back the introduction of a finalised planning scheme. The new Government is keen to have a single state-wide planning scheme which is unlikely to be finalised until 2015 (or later).

Learnings

1. A forthcoming change to the less flexible interim planning scheme brought forward a development proposal for Piano Cove. Whilst it may seem as though the planning authority has taken a long time to decide the matter, the proponent has not been quite ready to undertake the development. **Not all development delays are a result of the development approvals process.**
2. The changes involved in the implementation of the Interim Planning Scheme and now the State-wide planning scheme have added to the delays surrounding this development. **Wholesale changes in the planning scheme create delays and uncertainty.**
3. The development approvals process has identified a series of information requirements both about the land on which the development is to be sited and the infrastructure envisaged to support the development. Under the present system, the onus is on the developer to provide that information, including how the proposed development would affect natural and cultural heritage. This information can be expensive to collect and may highlight issues that are fatal to the development or expensive to remedy. **An improved base-level of knowledge about the land would be beneficial by:**
 - a. enabling developers to shape their development to minimise adverse impacts
 - b. providing a checklist that could identify the potential for impediments that may prove fatal and/or expensive to the development which can therefore either be resolved at an early stage, factored into the cost of the development, or prompt different (or no) development
4. If the Interim Planning Scheme was more flexible (by, for example, contemplating zone



changes) the Piano Cove development may have evolved with less haste and more consideration. **Whilst providing adequate protections, it is necessary for planning schemes to be fair and to give proponents a clear pathway to achieving their development in a reasonable timeframe.**



6.8 case study: bay of fires walk

Proposal: Development of small lodge and camping site for guided walking groups in 1999. In 2014, a day spa was developed at the Bay of Fires Lodge.

Site: Lodge development on private land near Ansons Bay, and camping site on leased land within Mount William National Park at Forester Beach.

Development History:

The Bay of Fires Walk was established in 1999, as a guided walking experience catering to small groups of 10. Two accommodation facilities were developed as part of the Walk – the Bay of Fires Lodge near Ansons Bay (sleeping 20 people) and a campsite within the Mount William National Park at Forester Beach. The business and associated development is low-impact and self-sufficient (i.e. has little relationship with townships and external services in the area.)

Together, the business and development required a number of approvals prior to establishment, including:

- Approval to lease land within a National Park from the state government.
- Approvals for guided walking activities within the National Park, obtained from the Parks and Wildlife Service – limiting groups to 10 walkers with two guides.
- Planning approvals associated with use and development of a lodge on private land near Ansons Bay.

A staff member peripherally involved in the initial approvals process in the late 1990s noted that there were a lot of 'unknowns' to navigate during the approvals process. This was due to the unique nature of the development and the specific approvals required. Both the proponent and Council were required to work within unfamiliar territory, with limited experience, which reduced certainty for all parties. Existing relationships and trust with the Parks and Wildlife Service (established through other business ventures) helped to reduce impediments to required approvals from State Government.

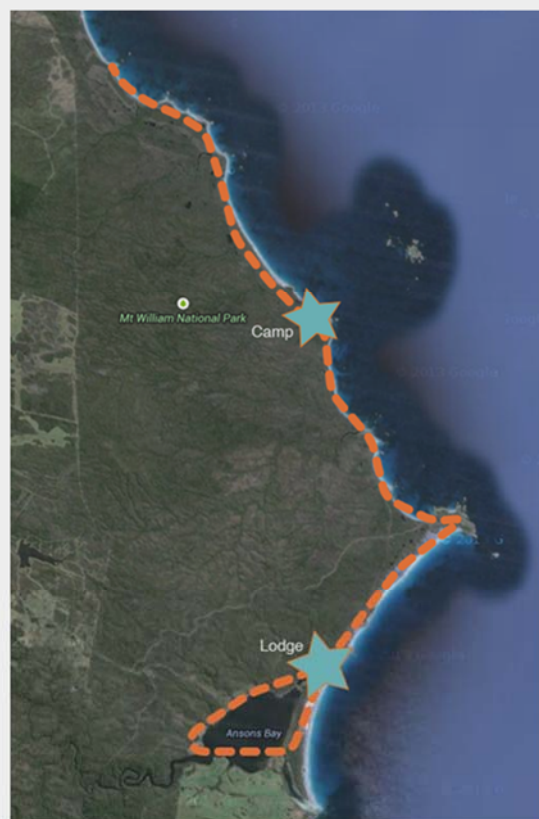
Management reported community resistance to the initial development in the 1990s, particularly from residents of Ansons Bay and recreational campers and fishers in the area. This primarily related to reduced access for those that had previously used the Lodge's private property to access the beach near Ansons Bay. This was seen as a significant issue at the time. Management report a general opposition from some

groups of residents, campers and fishers in the wider area to tourism development that may conflict with their current use of beaches, parks and rivers.

In 2014, the management of the Bay of Fires Walk sought to convert management quarters at the Bay of Fires Lodge to a day spa. This included the construction of a 'bath pavilion' on the existing structure. The company was required to obtain permits for both a change of land use, and development of the pavilion.

Management report that the approval time took only a matter of months. The idea was originally conceived in March 2013, and construction was completed by October ready for the peak tourism season. There was only a very small delay associated with approvals, due to the minor nature of the works. Council was seen to be generally supportive of both the original development and the 2014 changes. The company's consultants have, in the past, reported that there are resistant attitudes amongst some council staff. They reported the opportunity to improve culture and attitudes amongst decision makers and officers, and to generally increase levels of government support for tourism development.

Figure 34: Bay of Fires Walk and Developments



Source: base map from Google maps



Learnings:

1. Existing, positive relationships with key stakeholders, such as the Tasmania Parks and Wildlife Service, were critical to obtaining key approvals.
2. Community opposition and resistance can be an impediment to tourism development in the region, not only at the stage of approvals, but also with regard to wider issues of access. There is potential for conflict between existing recreational users (e.g. campers and fishers) and tourism operators in the region.
3. The tourism industry and their consultants sometimes see the culture of local government as being an impediment to development. The industry believes that there is an opportunity for councils to further facilitate and support tourism development in the region through the approvals process.



6.10 Investment Approvals: Some Conclusions

Even though not all development delays are caused by the approvals process, there is potential to improve the efficiency of development control. In particular:

- Information on the required approvals processes, the relationships between different approval processes, and even the current planning controls can be difficult to find and access, particularly online. This makes initial consideration of proposals hard and can lead to increased uncertainty.
- There is significant duplication in the existing approvals processes, particularly around environmental assessments, with little certainty of development prior to the preparation of costly reports. Reports prepared for one stage of the process may not be suitable for other stages, and there is no clarity at the outset as to which process will need to be followed, making investment decisions difficult. There may be scope to combine some environmental approval processes.
- The present uncertainty around the planning scheme should be resolved as quickly as possible in order to provide more certainty and a process that is both equitable and sustainable.
- There is little overarching direction regarding the appropriate balance between tourism and environmental outcomes meaning development is often highly contentious and consultation is often limited to specific proposals, when community issues may be much broader.
- An improved base-level of information about natural and cultural heritage in sensitive areas would be useful. This could take the form of a checklist of issues that developers need to address.
- The production of management plans for those Parks and Reserves which do not have them could identify and resolve the appropriate balance between development and conservation. This would provide more certainty for investors and the community. Such plans need not necessarily be entirely prescriptive but could contain performance standards that identify the conditions under which development could take place.
- Initial concept review within the PWS process leaves open the possibility of refusal on the basis of existing plans or strategies, notwithstanding

the proposal may be an improvement on existing strategies. The need for initial approval by PWS may compromise the ability for this to be assessed at a strategic level.

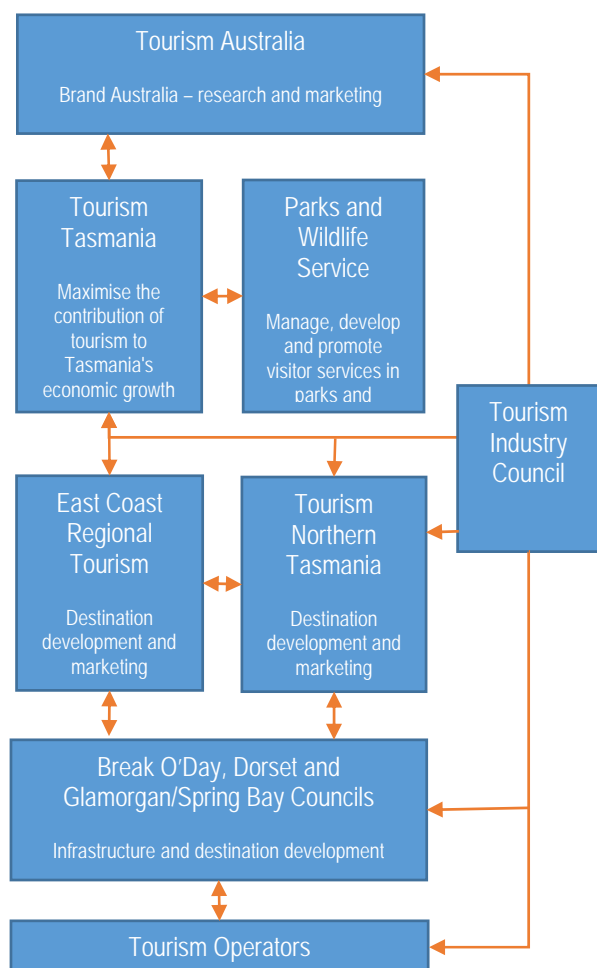
- There is also significant duplication of consultation activities which may lead to delays and which may also create confusion among stakeholders as to the issues at hand. There appears to be opportunities for consolidation and streamlining of the consultation process, particularly for complex projects.
- Development on the coastal fringe is clearly contentious and requires a high level of design and community input. A design guide for development professionals may be useful.



7 Existing and Emerging Policies

Many organisations are involved in the development of tourism policy affecting the study region, as shown in the following diagram.

Figure 35: Tourism policy connections, East Coast Tasmania



7.1 Tourism Australia

The key role of Tourism Australia is marketing Australian destinations to international audiences. It also has roles in market research, in coordinating access arrangements and in providing general advice on industry development.

Current programs relevant to East Coast Tasmania are:

- “There’s nothing like Australia” – general international marketing campaign

- “No leave, no life” – encouraging Australians to take short holiday breaks in their own backyard
- “Australia’s National Landscapes Program” – *“an initiative that aims to achieve conservation, social and economic outcomes for Australia and its regions via the promotion of superlative nature-based tourism experiences. The Program will help to ensure that our natural and cultural experiences are protected for our future and enjoyed by locals and visitors in a sustainable manner.”*

Most of Tasmania is a National Landscape in this program, including the East Coast Region. The program aims, in part, to leverage iconic landscapes to generate tourism investment and sustainable visitation. This fits with the broad aims of the Australian Government’s Sustainable Regional Development Program, which is part-funding the present project.

7.2 Tourism Tasmania

Tourism Tasmania’s latest strategic plan – Tourism 21 – aims to lift international and interstate visitor spending from a forecast of \$1.80 billion in 2021 to \$2.05 billion. The key market is interstate visitors.

The plan focuses on four key factors:

- Marketing
- Access
- Product development
- Workforce development

Under the heading of product development, a key action of interest to this project is:

Securing legislation and approvals for tourism activity in natural areas, and supporting the creation of iconic tourism infrastructure developments in these areas

Tourism Tasmania, 2013

This strategy remains in place following the change of Government. Clearly, State Government is keen to ensure that Parks and Reserves can contribute to economic outcomes whilst preserving the natural and cultural values for which they were established.



7.3 Parks and Wildlife Service

Complementing its main purpose in protecting and managing the natural and cultural values in parks and reserves, the Parks and Wildlife Service (PWS) has a strong subsidiary role in providing economic benefits to the community.

The balancing of natural and economic values is achieved through management plans for each park and reserve, which, in some cases are statutory documents.

Freycinet National Park

Freycinet is the most visited National Park on the East Coast of Tasmania with around 191,000 visitors in 2012-13. The management plan for the park (PWS, 2000) identifies three Visitor Services Zones where most of the visitor infrastructure is provided or planned as well as a Recreation Zone which has more low key investment. Priorities for visitor services development are short walks, interpretation and improvements to existing tracks and services to cope with high visitor demand and to prevent damage to the natural and cultural values. A path linking the Bicheno end of the Park with the Southern end of the Park is to be investigated.

Commercial services in the park will be entertained if they conform to the management plan and meet a variety of other conditions.

Douglas-Apsley National Park

The management plan for the Douglas-Apsley NP (PWS, 1993) nominates a series of Visitor Services Zones where investment will take place to provide camp sites, toilets, interpretation, local walks and other services. A Recreation Zone is also identified which is intended to provide a lower level of service to facilitate walking track development.

Whilst there has been some investment in visitor services, investment has reportedly declined in recent years with the result that camp grounds and trails declined in use. Visitation to the Park is modest, with numbers in 2004/05 being around 18,000.

Presently no management plan is available for the Mount William NP or for the major reserves in the study area (including the Bay of Fires Reserve).

[A discussion about the changes to camp-site development and perceptions of investment in Parks is provided in section 6 of this report.]

7.4 Regional Tourism Organisations

7.4.1 East Coast Regional Tourism Organisation

The East Coast Regional Tourism Organisation (ECRTO) covers the municipalities of Break O'Day and Glamorgan/Spring Bay. It has a destination management plan completed last year by the Stafford Group (2013). The main relevant opportunities identified by this report were:

- *Many parts of the region offer a stunning coastline and natural environment to leverage off;*
- *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 be 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 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);*
- *Opportunities to potentially develop a golf trail circuit utilising existing golf courses in the region and potential new golf courses are being assessed for the region; and*
- *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 of*



*most East Coast national parks and reserves
(other than at peak times ...)*

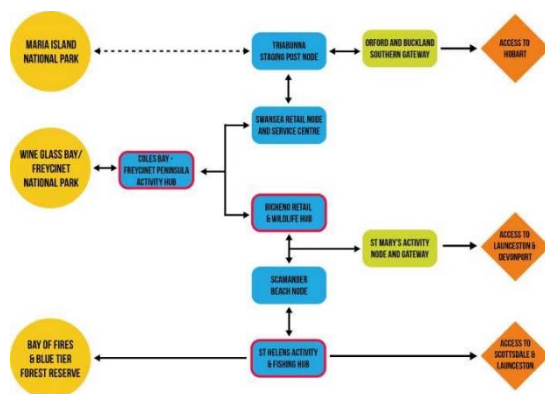
The Stafford Group, 2013

In addition to these opportunities, the destination management plan proposed a structure of hubs and nodes, in which regional communities are clearly linked since,

The marketability of the East Coast is significantly stronger if each town and area is linked and works in unison with one another

This support and marketing structure is illustrated below.

Figure 36: Tourism Hubs and Nodes



Source: The Stafford Group, 2013

7.4.2 Tourism Northern Tasmania

Tourism Northern Tasmania (TNT) covers the Council areas of Dorset, Flinders, George Town, Launceston, Meander Valley, Northern Midlands and West Tamar. Only a small part of the study region for this project falls in the TNT jurisdiction – the area of Dorset around Musselroe Bay and the Mount William National Park. The destination management plan for the region (Urban Enterprise, 2013) identifies several issues of relevance for the study area, including:

- Identify investment priorities for the region's nature-based tourism opportunities
- Develop cycling hubs, with Derby and the Blue Tiers – just outside the study area – being key investment locations for cycling infrastructure and promotion
- Develop indigenous tourism opportunities (including Larapuna at the Eddystone Lighthouse)

7.5 Council Tourism Plans

Each Council has its own strategy to develop tourism.

Break O'Day Economic Development Strategy (Break O'Day, 2013) contains a number of objectives and actions that aim to improve the economic contribution of tourism:

- **Visitors** Build the market: boost visitor numbers (overnight and day) and increase off-season visits.
- **Market Segments** Develop specialist markets (eg. conferences, diving, and fishing).
- **Tourism Product** Develop product: link the coastal experience and activities - in food trails, cycling, walking trails, diving trails, golf trails, fishing experience; and develop other events for the region.
- **Diving** Assess business case for diving wreck (HMAS Tobruk) as part of a regional diving trail.
- **Tourism Infrastructure** Improve infrastructure: address gaps in tourist infrastructure and services in the region including: accommodation options; cafes/restaurants; port area; other facilities and attractions.
- **Town Centres** Improvements in town centres will attract visitors and resident shopping.
- **Industry Skills:** Implement training for employees and small businesses.

The Break O'Day Tourism Strategy (Adam Sadder Consulting and Sara Lebski & Associates, 2013) also identifies the need to:

- Create a tourism infrastructure development plan
- Enhance visitor experiences by, for example, completing boardwalks and trails around St Helens
- Review free-camping and the impact of RVs
- Improve traffic management in St Helens
- Identify and support investments that will add to the "green" credentials of the destination

The latest strategic plan of Glamorgan/Spring Bay Council has identified sustainable tourism outcomes it would like to achieve, including development of food and wine trails, provision of visitor infrastructure and the creation of a year-round calendar of events.



7.6 Summary of Tourism Policy Considerations

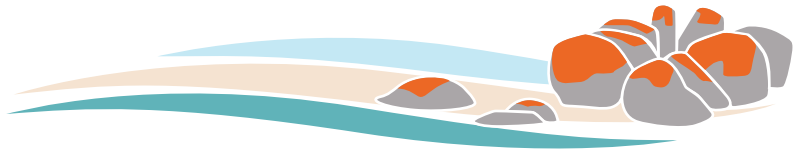
Amongst local and regional agencies, there is widespread recognition of the issues affecting the East Coast – strong seasonality affecting business viability and investment and the need for more commercial product to generate jobs and incomes. There is a desire to leverage off the outstanding natural environment to create opportunities for sustainable development. There is also recognition that infrastructure investment is required in towns and access ways in order to create beautiful urban places that will hold visitor interest.

The need to leverage off the natural environment has support at a State and Australian Government level where there are programs in place to promote the economic values of Parks and national landscapes.

Parks and Reserves have management plans which nominate the level of visitor infrastructure expected and, in some cases, identify areas that may be suitable for private sector investment. However, several of these management plans in the study area are out-of-date or have not been completed. Nevertheless, it is likely that PWS will be moving towards a regime that allows a more performance-based³ assessment of private investment proposals.

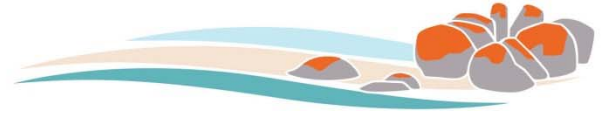
³ A performance-based approvals process is one in which consent is given provided certain criteria can be met; that is, as long as the proposed development can

demonstrate that it will meet environmental, social and other criteria, then consent is provided.



part b - tourism options





1 Options for Tourism Development

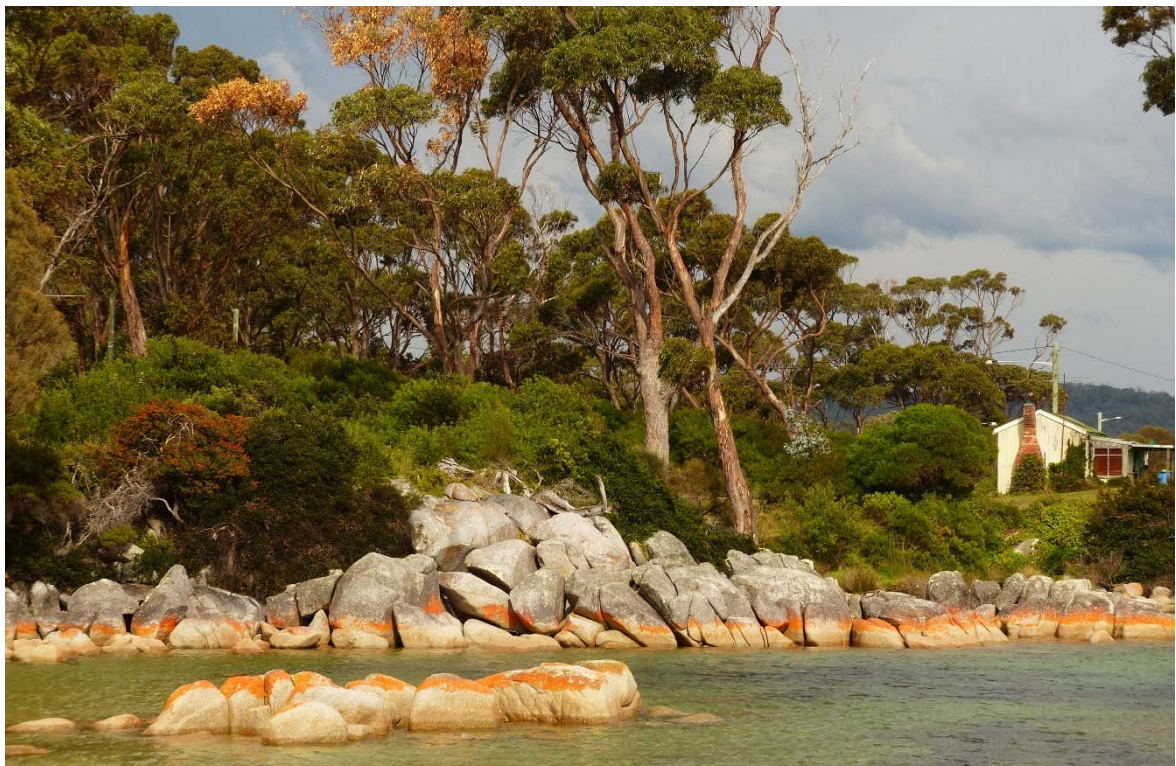
This project is about land-use and development outcomes that support sustainable tourism development.

In developing or adjusting the policy framework, it is useful to identify a number of scenarios to test different approaches. The following sections provide three scenarios:

- **Business as Usual** – identifying likely outcomes if policy settings remain the same
- **East Coast Blossoms** – focussing development efforts in and around the main towns of the region
- **String of Pearls** – linking the towns and intermediate destinations to create a regional experience trail

Each of these options has particular implications for land-use; each will have a different impact on natural and cultural values.

No recommendations are made about which scenario or combination of scenarios should be implemented. They are provided as a prompt for discussion amongst regional stakeholders. Further analysis will be undertaken about implementation and impacts in subsequent phases of this project.





2 Option 1: Business as Usual

2.1 Description

Existing trends in visitation and the location of investment will continue. This means that:

- Visitation will slowly recover to pre GFC levels.
- Yields (that is, spending per visitor) will begin to decline as no new high end attractions are developed.
- Strong seasonal variation in visitor numbers will continue to make operating a tourism business difficult.
- Coles Bay and surrounds will continue to attract the majority of visitors and tourism investment for the study area.
- Swansea and, to a lesser extent, Bicheno may get some overflow accommodation for people seeking the Freycinet experience.
- St Helens will begin to decline as no tourism investment is forthcoming and the fishing and related industries close with the closure of the barway.
- The area north of St Helens will secure no investment and visitation here declines as the expectations of summer campers become higher.

resources and attractions. It is also possible that continued low revenues associated with low overall and strongly seasonally-skewed visitation may lock management authorities and regulatory frameworks into a long term future with reduced capacity to plan and regulate tourism activities within the region

2.2.3 Cultural Heritage

This option will likely result in less direct physical impacts on heritage resources as it is envisaged that development would proceed at existing rates or even decline. Visitor activity will likely continue to be restricted to areas which have already been impacted.

However, continued low revenues may result in lower regulation capabilities, reducing the management capacity of responsible bodies to manage heritage resources. This could undermine efforts to manage attritional threats such as the physical deterioration of built heritage fabric and the loss of unrecorded cultural heritage materials through coastal erosion. Lack of resources may also restrict the ability of bodies to control or manage more deliberate impacts, such as the unauthorised expansion of camping areas in the coastal dune systems.

2.2 Impacts

2.2.1 Economic Development

The economic value of tourism will stagnate as slow growth in visitor numbers is balanced by a decline in yield (with no investment in new or existing product). With the continued decline of other industries in the region, the population decline of recent years will gather pace with impacts on the viability of existing services.

2.2.2 Natural Heritage

The 'do nothing' option may result in the lowest overall impact on existing natural heritage values within the study area, whilst also allowing the possibility that cumulative impacts or occasionally intense but localised impacts may occur from an ongoing tendency for case-by-case approvals of new developments. The current heavy focus on the narrow coastal strip is unlikely to change without an overarching strategic vision which ties the coast to the near coastal



3 Option 2: East Coast Blossoms

3.1 Vision

Each of the key towns of the region will blossom into dynamic and attractive visitor destinations, capable of sustaining the interest of interstate and international guests for extended periods.

Extending the length of stay of visitors by creating more things for them to do in the area will generate higher incomes from tourism and will improve services for residents, creating jobs in the process.

3.2 Description

This option is basically the same as the strategy proposed in the Destination Management Plan of the East Coast Regional Tourism Organisation, with its designation of hubs and nodes. The option envisages the development of the key hubs of the region into well-served destinations that offer a range of high quality activities, both commercial and free.

The target markets are those for whom the region is already attractive - independent travellers seeking high quality experiences in nature, culture, food and wine. There is also the potential for taster experiences for small tour groups, introducing the region to, for example, the Chinese market so that the East Coast is on their horizon as the market begins to generate more independent travellers in the decades ahead.

Significant incremental development of the key destinations is required in order to:

- Ensure that the towns and their commercial centres are attractive and provide high quality services.
- Generate a wider range of accommodation from back-packers hostels to eco-resorts, from glamping sites to high end holiday homes.
- Grow the activity base, taking every opportunity to create new experiences for target markets (walking, kayaking, sailing, diving, sport fishing, cultural heritage tours, food tours, winery tours).

This option focuses on the towns and surrounding areas that service the existing iconic attractions of the region – the parks of Freycinet and the Bay of Fires. Many of the projects identified in section 6.2.2 could be

supported by this option. The option has implications for each area.

Figure 37: East Coast Blossoms



3.2.1 Musselroe Bay and Surrounds

- Develop the proposed golf course resort and accommodation
- Develop guided activities for visitors – sailing, diving, kayaking



- Develop visitor infrastructure including local walking trails and interpretation of local wildlife and aboriginal heritage
- Identify site for a café/shop in the existing village

3.2.2 St Helens and Surrounds

- Complete the necessary works to ensure that St Georges Bay has safe access to the ocean for the fishing fleet, recreational fishers and visiting yachts
- Improve the design of the town centre, including creating a stronger and more commercial connection between town centre activities and an expanded waterfront/marina
- Provide a dive wreck at Skeleton Bay as part of the East Coast dive trail
- Provide commercial accommodation in the southern section of the Bay of Fires
- Develop local walks and improve interpretation of key sites
- Develop events calendar to generate visitation throughout the year

3.2.3 St Marys and Surrounds

- Broaden the accommodation offering, including hilltop escapes
- Improve local walking trails and interpretation, including at St Patricks Head
- Develop classic car display
- Develop archaeological trail of heritage sites in the town

3.2.4 Bicheno

- Improve the streetscape of the town centre to draw travellers off the highway
- Broaden the accommodation offering to include beachside hotel
- Improve local walking infrastructure
- Develop events calendar to generate visitation throughout the year

3.2.5 Coles Bay

- Improve parking and access arrangements around the jetty
- Develop further sympathetic guided and self-guided tours and activities including canoeing, sailing, surfing, walking, cycling etc and connect these better to accommodation providers

- Improve local walking and canoe trail infrastructure

3.2.6 Swansea

- Develop winery trails and local produce outlets
- Develop events calendar to generate visitation throughout the year

3.3 Outcomes and Issues

3.3.1 Economic Development

Compared with the Business as Usual scenario, this option should attract more visitors in all the target markets and encourage them to stay longer, with consequent improvements in spending. With more activities and an improved calendar of events, visitation should be spread throughout more of the year than at present, generating improvements in the viability of tourist enterprises. In addition, visitation would be spread more evenly through the region, with more investment in St Helens.

This option relies to some extent on public sector investment at key nodes generating private sector investment in visitor activities and services (including, for example, the Barway project at St Helens). In order to ensure that private sector investment flows from these public interventions, a strategic planning approach and performance-based development approvals will be required.

3.3.2 Natural Heritage

Increased development of the proposed hubs is likely to result in direct impacts on some zones of High Conservation Significance for Matters of National Environmental Significance, as these are strongly clustered in the coastal strip, and occasionally they coincide with population centres or popular campgrounds.

Development could result in indirect impacts, for example increased rates of roadkill of wildlife in areas where substantial increases in traffic are brought about by the increased and intensified visitation. Improvement in road surfacing in some areas may for example lead to more night driving, and thereby a greater rate of roadkill for threatened native mammals (Tasmanian Devil, Tasmanian Bettong, Eastern Barred Bandicoot) and colonial birds (Little Penguin) over and above abundant species (Tasmanian Pademelon, Red-necked Wallaby, Common Brushtail Possum) which currently dominate the roadkill complement.



Under this option, short distance circuit trails could be focussed on natural heritage resources whilst encouraging safer practices such as mostly daytime driving and participation in organised ecotourism experiences (penguins, muttonbirds, etc.) to prevent, or mitigate, undue disturbance.

3.3.3 Cultural Heritage

Increased development of the proposed hubs is unlikely to result in substantial impacts on any places which are subject to the highest level cultural heritage designations (i.e. Matters of National Environmental Significance protected under the EPBC Act).

However, concentrated development pressure in and around each of the hubs may result in direct impacts on other heritage resources, particularly along the coastline dune systems which are sensitive for the Aboriginal archaeological material which they contain.

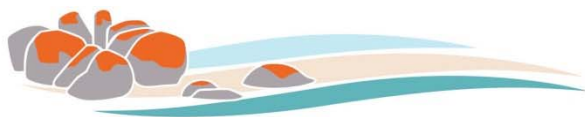
Heritage properties, including places of State significance on the Tasmanian Heritage Register, particularly in St Marys, Bicheno and Swansea, may come under increased development pressure.

Development could result in indirect impacts, for example on the settings of heritage places. Without careful management, larger concentrations of visitors within these hub areas may begin to intrude upon places which have intangible cultural associations, for example places of significance to the Aboriginal community or of social significance to the wider community, such as the various shack settlements.

On the other hand, positive impacts deriving from this option would include increased opportunities to raise awareness of heritage and to provide that heritage with a means to 'earn its keep'.

By providing economic opportunities to the community – potentially the Indigenous community in particular, this could be the driver for the development of improved consultation channels and Council protocols for managing cultural heritage whilst also increasing the resources of management bodies.

Under this option, short distance circuit trails could be focussed on cultural heritage resources but with a degree of flexibility in their route to prevent, or mitigate, undue disturbance.



4 Option 3: String of Pearls

4.1 Vision

An iconic trail along the length of the East Coast will provide a year-round attraction that links the regional tourism experiences and encourages visitors to choose their own adventure.

The “pearls” will develop in the same way as Option 2.

This option aims to extend the length of stay, encourage repeat visitation and develop more year round attractions that can support a more viable tourism industry.

4.2 Description

Using the mechanism of a new East Coast Trail, this option aims to significantly expand the provision of places to stay and things to do at suitable destinations along the coast.

The trail itself is envisaged as a step-on step-off walking track with a range of accommodation options and a range of difficulties (see section 2.3.4 of this report). Parts of the trail would be remote, with camping/park cabin only accommodation options; parts would be capable of being undertaken using commercial accommodation. Almost everyone visiting the region would use the East Coast Trail at some point, whether for a stroll, a day walk or an overnight adventure. The length of the trail means that few would complete it in a single trip; trail-ers would be encouraged to keep coming back to complete further sections.

Development of the trail would mean close examination of the accommodation options at each destination and overnight stop. In particular, the Parks and Wildlife Service would be encouraged to create some diverse and well-serviced accommodation nodes for which booking fees would need to be charged. These could include a range of options from remote camping sites serviced with water and toilets to luxury cabin-style accommodation. It may be that some of the existing informal camping areas would need to be converted.

Figure 38: String of Pearls





For the most part, the trail would stay close to the coast and the beautiful beaches of the region. However, there is an excellent option to use the Leeaberra track through the Douglas Apsley National Park and to connect with St Marys to take advantage of the magnificent views of the coast from the ridgeline (and to provide some variety in walking conditions).

In some places, the trail would create strong recreation and pedestrian links for local residents as well as visitors including, for example:

- Development of an iconic footbridge/cycleway connecting Swanwick and Dolphin Sands providing easy cycle connections into Swansea
- Development of high use pathway/cycleway between nearby settlements such as Falmouth and Scamander, where no easy connection exists at present

This option relies on all the actions proposed in option 2 to develop the key towns. In addition, development in the smaller intermediate locations will be required in some cases in order to create adequate accommodation. The map accompanying this option shows three levels of node:

- Key towns, with development as described in option 2
- Intermediate settlements, where commercial accommodation could be developed at suitable sites
- Walking accommodation nodes, mainly isolated campsites or cabins in parks and reserves with potential for unique experiences such as the proposed Larapuna aboriginal cultural trail

All the development projects identified in section 6.2.2 could be supported by this option.

The target market for this option is similar to that for option 2; that is, experience-seeking independent travellers.

4.3 Outcomes and Issues

4.3.1 Economic Development

This option builds on option 2 with the addition of a major new walking trail and linked development of some intermediate destinations. The trail will be a new product, marketable in itself, but also better connecting the towns and settlements of the region. This product will encourage visitors to stay longer in the region; to move from one part of the region to another; to come back to the region; and to come to the region outside peak holiday times.

The option will rely on changes to the planning regime as noted for option 2. It will also require action by PWS to take on much of the development and marketing of the East Coast Trail (although Councils and some private land-holders would also need to contribute). PWS would also need to resolve locations for walkers' camp-sites and cabins, to develop these and establish booking processes.

If services and fees are introduced to any existing remote campsites, some of the current users (ie free campers) may be displaced. This may put pressure on the remaining free camp sites. Management systems will need to be put in place to police the use of campsites.

4.3.2 Natural Heritage

Increased development of the proposed nodes is likely to result in direct impacts on some zones of High Conservation Significance for Matters of National Environmental Significance, as these are strongly clustered in the coastal strip, and occasionally they coincide with population centres or popular campgrounds.

Development could result in indirect impacts, for example increased rates of roadkill of wildlife in areas where substantial increases in traffic are brought about by the increased and intensified visitation. Improvement in road surfacing in some areas may for example lead to more night driving, and thereby a greater rate of roadkill for threatened native mammals (Tasmanian Devil, Tasmanian Bettong, Eastern Barred Bandicoot) and colonial birds (Little Penguin) over and above abundant species (Tasmanian Pademelon, Red-necked Wallaby, Common Brushtail Possum) which currently dominate the roadkill complement.

Under this option, short distance circuit trails could be focussed on natural heritage resources whilst encouraging safer practices such as mostly daytime driving and participation in organised ecotourism experiences (penguins, muttonbirds, etc.) to prevent, or mitigate, undue disturbance.

4.3.3 Cultural Heritage

The development of linear routes cutting across waterways and along the coastline is more likely to directly impact on sensitive archaeological deposits in these areas. In some places a lack of route options will inevitably result in disturbance to archaeological deposits.

This option presents a potentially larger development footprint with the potential to create impacts along the



whole coast. In these circumstances it will be difficult to retain areas of coastline for the exclusive use of the Aboriginal community.

The connections will traverse areas which are as yet largely undisturbed, and without careful management deviation from the managed routes could bring impacts to sensitive areas which were previously relatively isolated. (of course this is also an advantage as regards the attraction of certain heritage resources).

An advantage would be the potential to link widely spaced heritage resources into themed trails. However, it should be borne in mind that much of the cultural heritage material along the coastline (namely Aboriginal middens and other sites characterised by artefact deposits) is not only very fragile but also of limited interpretive potential.

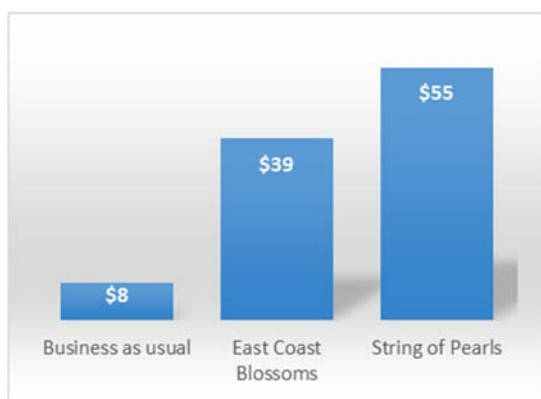


5 Comparison and Discussion

5.1 Economic Benefits

The three scenarios will provide different outcomes for visitation, spending and employment generation. Modelling of the effects of these options on visitor spending is shown below.

Figure 39: Estimated difference in annual visitor spending generated by each option by 2022-23 (\$m)



Source: Tim Nott

Note: Base year, 2012-13 for East Coast Tourism Region

Under the Business as Usual option, there is minor growth mainly as a result of the demands of an increasing population.

East Coast Blossoms generates substantial growth, with an additional \$39 million per year in visitor spending by 2022-23. This is as a result of increased accommodation and activities. These revenues would be sufficient to create an additional 180 full-time equivalent jobs by 2022-23 compared with the present. This represents growth of 4.9% in the total number of jobs in the East Coast region in 2011.

String of Pearls also generates substantial growth with an additional \$55 million per year in visitor spending by 2022-23. This option provides for even larger growth in accommodation and visitor activities, with revenues sufficient to create around 250 additional jobs by 2022-23. This represents 6.8% of the total number of jobs in the East Coast region in 2011.

5.2 Environmental and Cultural Effects

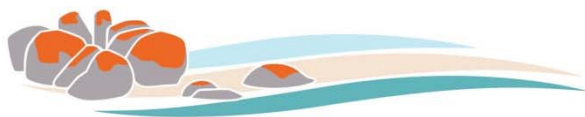
The effects of the options on the environment and culture of the region would also be different.

Business as Usual creates little new tourism product; the small growth in visitor expenditure will accrue mainly to the Coles Bay area which is currently the key destination for target markets (independent travellers from interstate or international origins). This will put some further pressure on the environment there. Elsewhere, the lack of investment and visitor growth will reduce the potential to fund infrastructure to manage existing conflicts between people and the environment. Nevertheless, lack of investment will generally mean that environmental and cultural values will remain unchanged from the present.

East Coast Blossoms requires a concerted and coordinated effort to identify, plan and provide local infrastructure works to support tourism. This is likely to demand some changes to existing planning and development approvals arrangements. Impacts on existing natural and cultural values would mainly be indirect as long as care was taken at the development approvals stage.

String of Pearls requires a coordinated effort to plan local and regional infrastructure to support tourism. This will include changes to the camping arrangements on the coast to generate more revenues and better services. The creation of a long distance trail and development of smaller accommodation nodes between main towns may have some direct and unavoidable impacts on natural and cultural values. However, these could be minimised through appropriate planning and implementation.

Further assessment of the impacts of the potential development options will be conducted as part of the next phase of this project.



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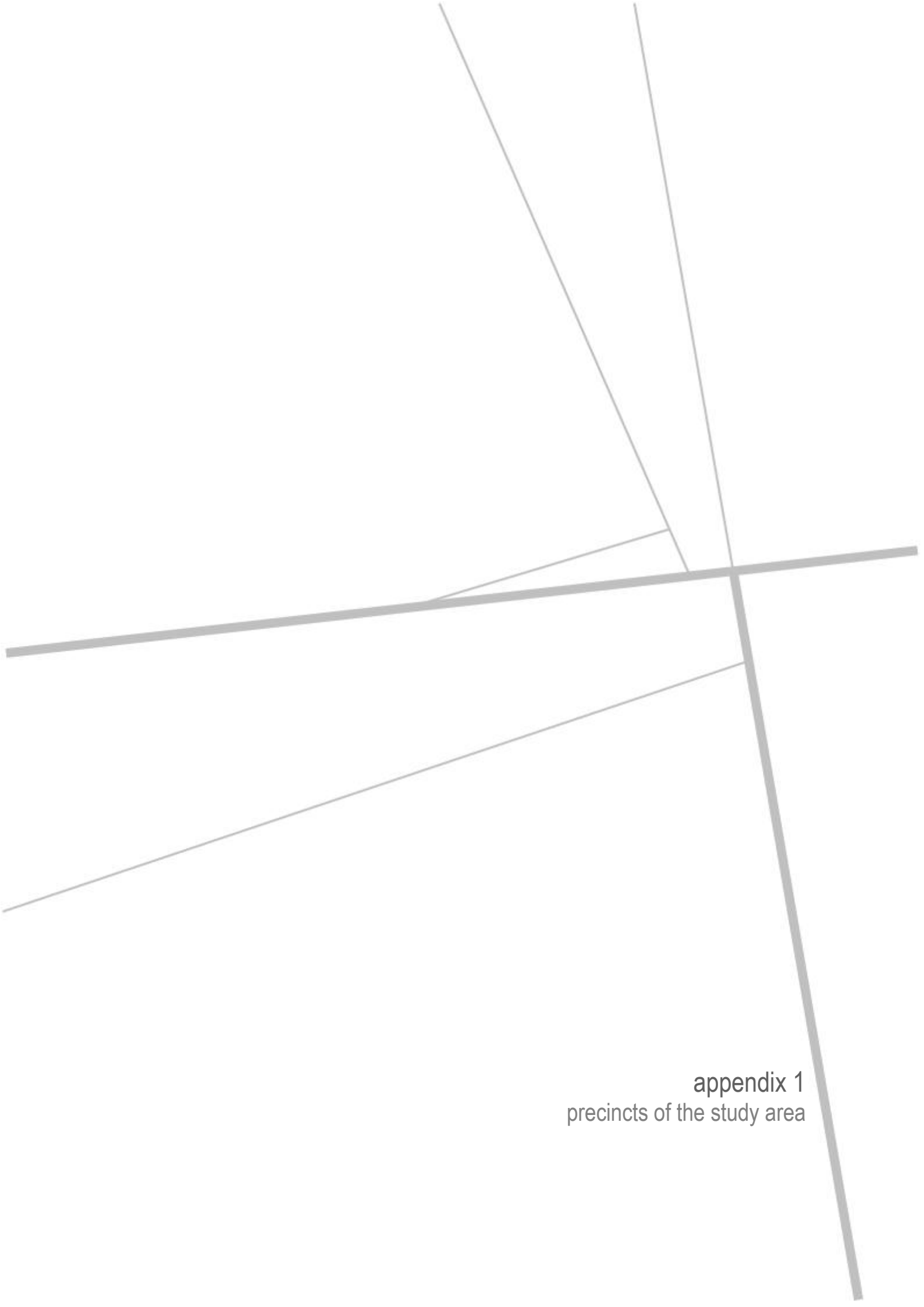
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appendix 1
precincts of the study area

Musselroe Bay Precinct

location

Musselroe Bay Precinct is located on the north-eastern most edge of Tasmanian coast, to the north-east of Launceston. The precinct is predominantly defined by Great Musselroe Bay and Mount William. Access to the precinct is only available via unsealed roads, with the closest town being Gladstone to the south-west.

towns/ settlements

There are no towns (with facilities) located in the precinct. The two settlements located within the Musselroe Bay Precinct and their populations are:

Musselroe Bay  116 Lyme Regis  230

accommodation

There are seven identified camping sites within this precinct. The relevant five sites are all located within Mount William National Park, south of Musselroe Bay. A permit has recently been granted for a large stand along resort which will incorporate a golf club and airstrip on private land to the immediate south of the Musselroe Bay settlement.

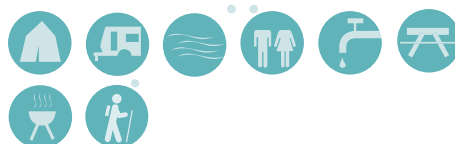
tourist attractions

The Musselroe Bay Precinct has the following natural features:

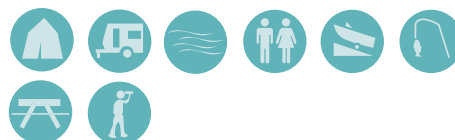
- Boobyalla Beach;
- Tregaron Lagoons;
- Mount William;
- Cape Naturaliste; and
- Swan Island and lighthouse

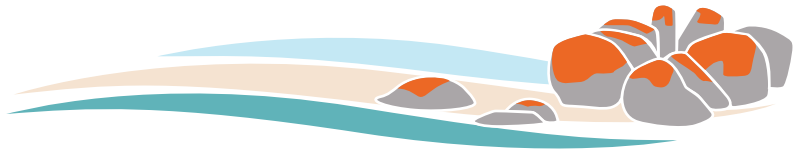
The following Parks and Reserves are found within this precinct and offer the following facilities:

- Mount William National Park



- Musselroe Bay Conservation Area





zoning

Zoning of land within this precinct is generally in the Rural Resource Zone, with the areas along the coastline and bays in the Environmental Management Zone. The settlement areas are zoned a Particular Provision Zone and Environmental Living. Areas of the precinct are also affected by codes relating the Flood Prone Land and Priority Habitat areas.

other information

As part of the development of the approved resort it is understood that the road between Gladstone and the resort will be sealed. Limited access is available to Mount William National Park except for the lookouts and campsites in the northern section (within this precinct). Significant views are also available from this precinct to Flinders and Cape Barren Islands in the north.

Musselroe Bay Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
- look out
- lighthouse
- post office
- golf course
- winery
- boat ramp
- B82 road route number
- airstrip
- proposed sealed road
- major road
- unsealed major road
- sealed minor road
- unsealed minor road
- 4WD road
- ferry route
- walking trails
- swamp area
- water bodies
- rivers
- contours



Ansons Bay Precinct

location

Ansons Bay Precinct includes most of Mount William National Park, south of Cod Bay and extends south past Cape Eddystone and Ansons Bay. It includes much of the lesser known and inaccessible parts of the Bay of Fires extending down close to The Gardens

towns/ settlements

There are one town (with potential facilities) located in the precinct. There is one other settlement located within the Ansons Bay Precinct; their populations are:

Ansons Bay  116

Deep Creek  NA

accommodation

There are two camping areas within the Ansons Bay Precinct. The first is located south of Deep Creek within Mount William National Park and the second is at Policemans Point, at the mouth of Ansons Bay. Anecdotal evidence indicates many of the houses within Ansons Bay are available as holiday rentals.

tourist attractions

Ansons Bay Precinct has the following natural and cultural features:

- Gardens Lagoon
- Bay of Fires
- Ansons Bay
- Eddystone Point Lighthouse

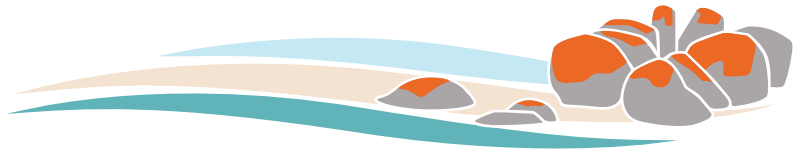
The following Parks and Reserves are found within this precinct:

- Mount William National Park



- Bay of Fires Conservation Area





zoning

The predominant land use zoning within the precinct is Environmental Management, which covers Mount William National Park, the coastal areas and Ansons Bay. Other portions of the precinct are zones Rural Resource, while Ansons Bay includes Environmental Living, Low density Residential, Utilities and a particular Provision Zone for Ansons Bay Small Lots.

other information

A proposal exist to use the Eddystone Point lighthouse and surrounding structures as a focal point for a new cultural tourism experience.

While there is a shop at Ansons Bay, this is currently vacant. There are also private developments occupying the waterfront in large parts of Ansons Bay.

Ansons Bay Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
- look out
- lighthouse
- post office
- golf course
- winery
- boat ramp
- road route number
- airstrip
- proposed sealed road
- major road
- unsealed major road
- sealed minor road
- unsealed minor road
- 4WD road
- ferry route
- walking trails
- swamp area
- water bodies
- rivers
- contours



St Helens Precinct

location

St Helens Precinct is positioned relatively centrally along the eastern coast of Tasmania. The precinct includes the most well known and accessible parts of the Bay of Fires, with Binalong Bay providing the key settlement on the bay. The precinct is also defined by St George's Bay on which is located the east coast's main town, St Helens, and a number of satellite settlements. This is also the point where the main east coast highway, the A3, meets the coastline.

towns/ settlements

St Helens is the major town on the east coast, and is supported by a number of other residential settlements. Binalong Bay includes some limited facilities.

St Helens	2173	Binalong Bay	643
The Gardens	213	Bayview	210
Fairlea	NA	Parkside	NA
Parnella	NA	Stieglitz	NA
Akaroa	NA	Dianas Beach	NA

other information

There is an airstrip located on the eastern coastline of Tasmania within this precinct, between Parkside and the eastern coastline.

tourist attractions

The St Helens Precinct has the following natural features:

- The Bay of Fires Conservation Area;
- Binalong Bay;
- Humbug Point State Recreation Area;
- Mount Pearson State Reserve;
- St Georges Bay;
- St Helens State Recreation Area; and
- Dianas Basin

The following Parks and Reserves are found within this precinct:

- Bay of Fires Conservation Area



- Humbug Point State Recreation Area

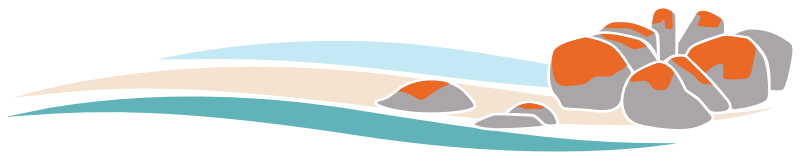


- Mount Pearson State Reserve



- St Helens State Recreation Area





zoning

The zoning within the St Helens Precinct is primarily in the Environmental Management Zone, with large areas of Environmental Living. There are some areas of Rural Resource to the west of St Helens. Urban areas within the precinct have a range of zones including residential and commercial, as well as utilities and recreation zones.

accommodation

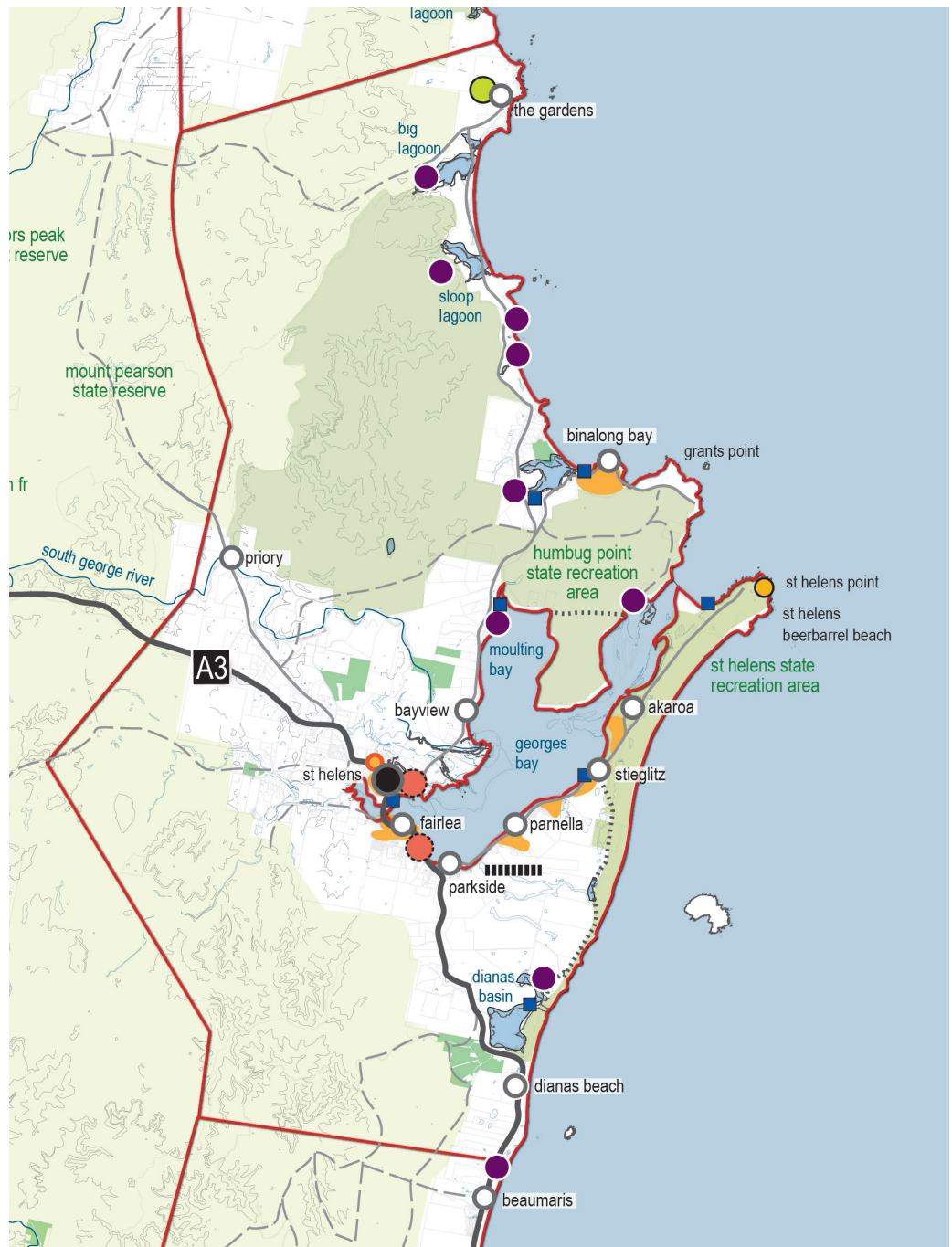
There are eight identified camping sites within this precinct, four of which are located on the edges of the lagoons. The other camping sites are located north of Binalong Bay and on the northern side of Moulding Bay and Georges Bay.

St Helens also has a number of caravan parks and a limited number of hotel / motel accommodation sites. The area more broadly has a significant number of holiday rentals.

St Helens Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
- look out
- lighthouse
- post office
- golf course
- winery
- boat ramp
- B82 road route number
- airstrip
- proposed sealed road
- major road
- unsealed major road
- sealed minor road
- unsealed minor road
- 4WD road
- ferry route
- walking trails
- swamp area
- water bodies
- rivers
- contours



Scamander Precinct

location

The Scamander Precinct is positioned centrally along the east coast. Scamander itself is the main township but many visitors also enter the region though St Marys up in the hills behind the this stretch of coastline, which offers access to both Scamander and Bicheno further to the south.

towns/ settlements

The main towns in the Scamander Precinct are Scamander on the coast and St Marys in the hills. There are also a number of other residential settlements along the coastline and in the hills. These and their populations are:

Scamader	506	St Marys	511
Beaumaris	210	Falmouth	195
Four Mile Creek	195	Ironhouse Point	141
Gray	NA	Irish Town	NA
German Town	NA		

tourist attractions

Scamander Precinct has the following natural and cultural features:

- Shelly Point
- Henderson Lagoon
- St Marys Pass
- Lagoons Beach
- Elephant Pass

The following Parks and Reserves are found within this precinct:

- Scamander Conservation Area

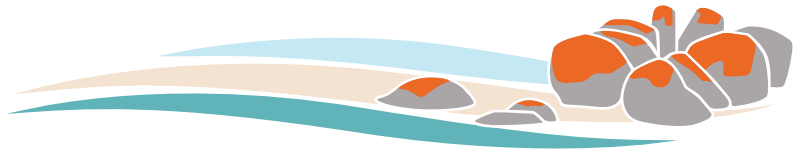


- St Patricks Head State Reserve
- Little Beach State Reserve
- German Town Forest Reserve

other information

The White Sands Resort is undergoing further upgrades, and also includes the Iron House Brewery, a microbrewery which produces a range sold along the coastline.





zoning

This precinct is slightly different from others in that the majority of land is within the Rural Resources Zone, with only smaller areas of Environmental Management and Environmental Living. The towns of Scamander and St Marys are characterised by a number of urban related zones, while the settlement of Falmouth is under a Low Density Residential Zone.

accommodation

There are five camping sites within this precinct. Three are found on the northern edge, one at Shelly Point, another north of Beaumaris and the last on the northern point of Scamander River. The fifth camping ground is at Lagoons Beach. Scamander has a number of caravan parks and also a range of other accommodation options.

Scamander Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
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- unsealed minor road
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- rivers
- contours



Douglas Apsley Precinct

location

The Douglas Apsley Precinct is a relatively small precinct, with the southern boundary of this precinct defined by the municipal boundary between Break O'Day and Glamorgan / Spring Bay Councils. Chain of Lagoons is the northernmost settlement with precinct identified predominately by Douglas Apsley National Park.

towns/ settlements

The precinct has limited settlements, with the largest being Chain of Lagoons and no towns with facilities. The relevant populations are outlined below:

Chain of Lagoons



Seymour



Douglas River



tourist attractions

Douglas Apsley Precinct has the following natural and cultural features:

- Templestowe Lagoon
- Denison Beach
- Long Point

The following Parks and Reserves are found within this precinct:

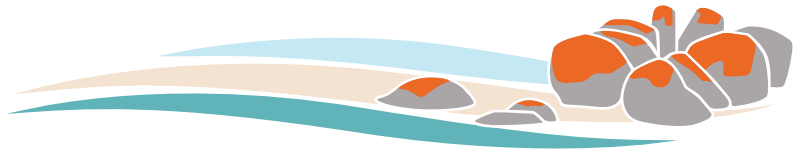
- Douglas Apsley National Park



accommodation

There are no camping sites within the precinct, however one does exist on the south-western edge of the precinct within Douglas Apsley National Park. A caravan park is located at Douglas River.





zoning

The Douglas Apsley Park is zoned Environmental management, while the majority of the rest of the land is under a Rural Resource Zone, with areas of Environmental Living also present in the area.

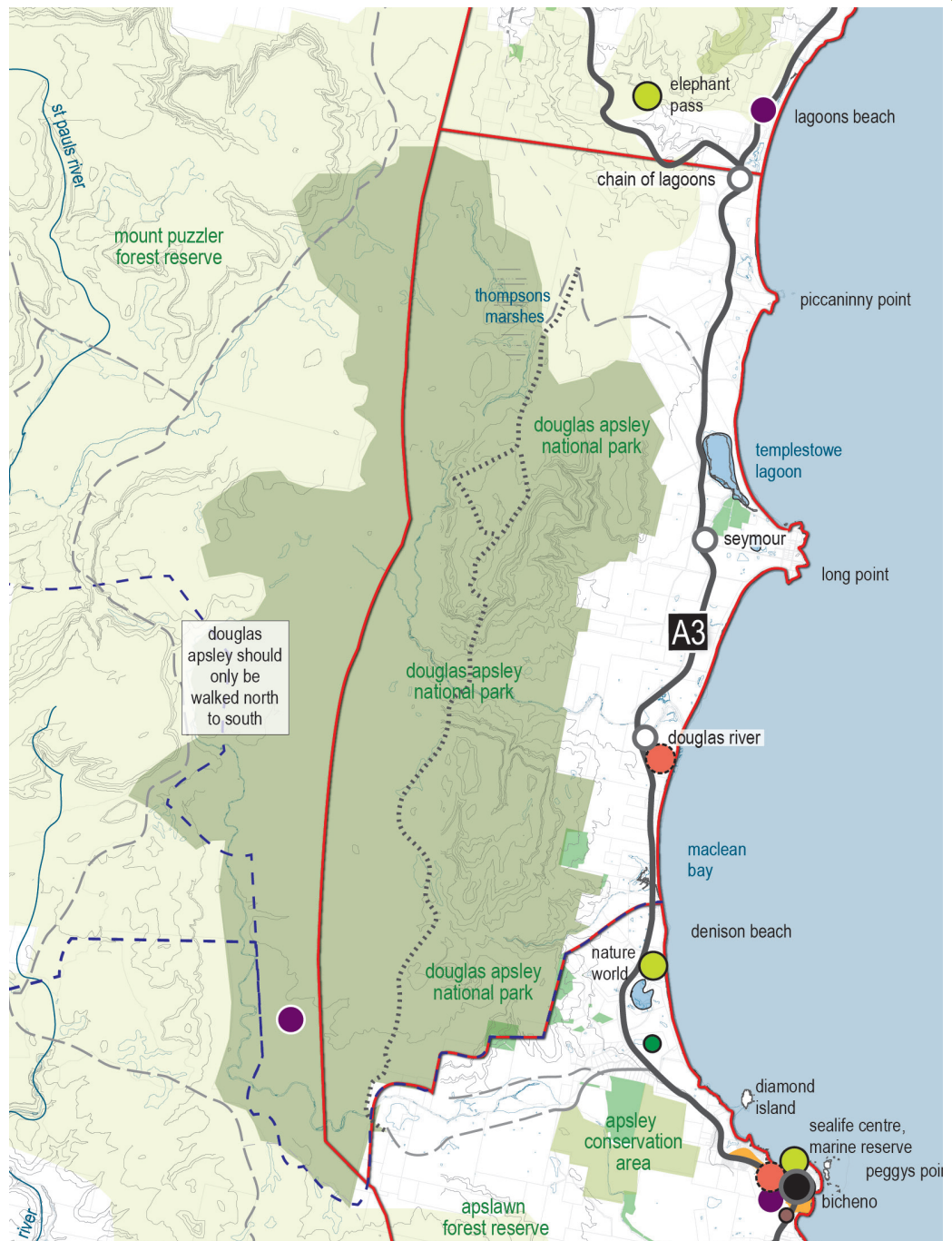
other information

There is an existing multi day walk within the Douglas Apsley National park known as the Leeaburra Track, although anecdotal evidence suggests that this has not been maintained and access to the north of the park is currently difficult.

Douglas Apsley Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
- look out
- lighthouse
- post office
- golf course
- winery
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- sealed minor road
- unsealed minor road
- 4WD road
- ferry route
- walking trails
- swamp area
- water bodies
- rivers
- contours



Moulting Lagoon Precinct

location

Moulting Lagoon Precinct is one of the larger precinct and forms a transition to more inland areas. It includes the coastal second largest town (Bicheno) and the northern extents of Freycinet National Park. The large Ramsar Listed wetland system of Moulting Lagoon is the defining feature, although the precinct extends west to include wineries along the A3 and the major service centre of Swansea.

towns/ settlements

The precinct has two major towns with facilities (Bicheno and Swansea) and a number of smaller residential settlements are also located within the Moulting lagoon Precinct. Their populations are as follows:

Bicheno	853	Swansea	597
Dolphin Sands	279	Swanswick	NA
Landaff	NA	Apslawn	NA
Cranbrook	NA		

tourist attractions

Moulting Lagoon Precinct has the following natural and cultural features:

- Nature World
- Sealife Centre, Marine Reserve
- Cape Lodi
- Couland Bay
- Friendly Beachs
- Apsley Marshes (RAMSAR listed)
- Wineries
- Moulting Lagoon (RAMSAR listed)
- Bark, Mill, Wine and Wool Centre

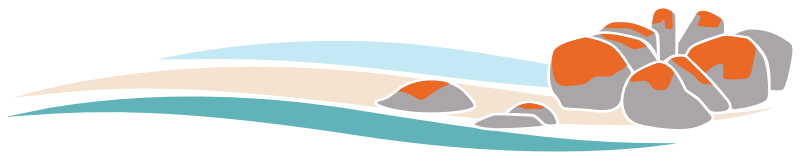
The following Parks and Reserves are found within this precinct:

- Freycinet National Park



- Coles Bay Conservation Area
- Apsley Conservation Area
- Apslawn Forest Reserve
- Moulting Lagoon Game Reserve





zoning

This precinct is located predominately within Rural Resource and Environmental Management Zones

accommodation

There are five camp sites scattered throughout the precinct at Moulting Lagoon and a Friendly Beaches. One caravan park is located in Bicheno.

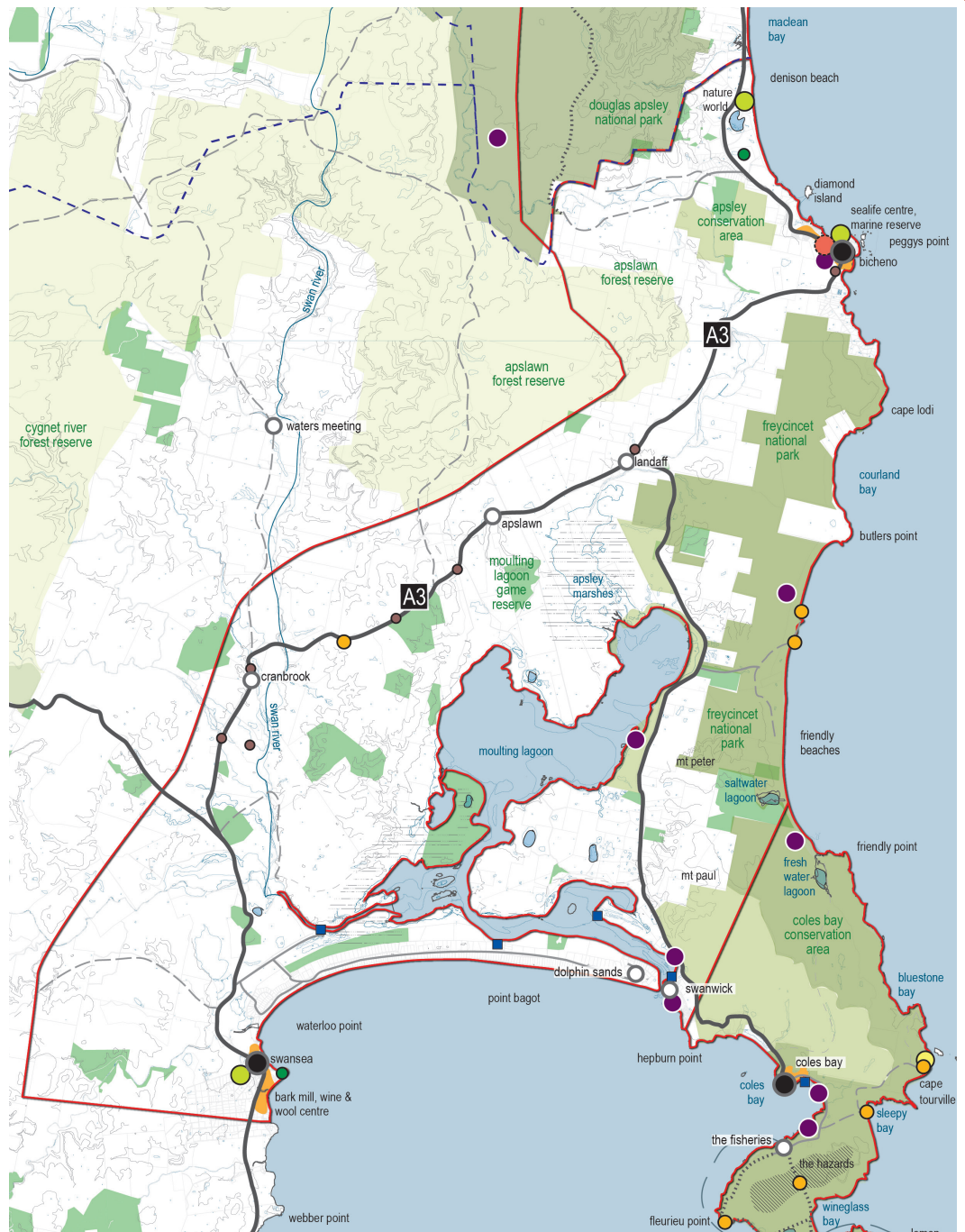
other information

A significant characteristic of this precinct, are the number of wineries that existing along route A3 between Swansea and Bicheno. Moulting Lagoon offers a range of activities including camping and water sports with 5 boat ramps located around the southern end of the Lagoon. A golf course also exists north of Bicheno.

Moulting Lagoon Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
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- sealed minor road
- unsealed minor road
- 4WD road
- ferry route
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- swamp area
- water bodies
- rivers
- contours



Freycinet National Park Precinct

location

Freycinet National Park Precinct is the southern most point of this study, positioned on the eastern coastline of Tasmania. The precinct is north-east of Hobart and identified by the national park and Coles Bay.

towns/ settlements

The precinct only has one town with facilities (Coles Bay) as well as a small residential settlement; their populations are:

Coles Bay



The Fisheries

zoning

This precinct is located predominately under the Environmental Management Zone with small areas of urban zones at the settlements.

tourist attractions

The Precinct has the following natural features:

- The Hazards
- Cape Tourville Lookout
- Promise Bay
- Walking trails
- Fleurieu Point

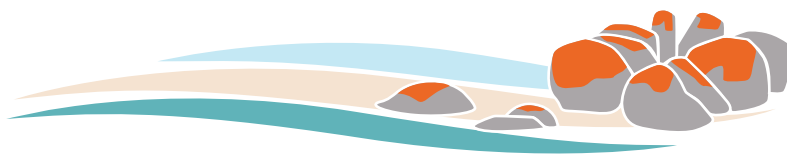
The following Parks and Reserves are found within this precinct:

- Freycinet National Park



- Coles Bay Conservation Area
- The Hazards





accommodation

There are six camping spaces located in this precinct. One is located north of Fresh Water Lagoon, two between Coles Bay and The Fisheries and the remainder within the southern edge of Freycinet National Park, near Promise Bay and the Hazard Lagoons. This precinct also contains the Saffire Resort, Freycinet Lodge and a number of other accommodation options in and around Coles Bay.

other information

This precinct includes Schouten Island, south of the mainland. A number of walking trails exist throughout Freycinet National Park which pass through The Hazards, including: Peninsula Track, Isthmus Track, Wineglass Bay Track and Hazards Beach Track. A number of scenic lookout are also located within this precinct.

Freycinet National Park Precinct Map

legend

- precinct study area
- municipal boundary
- town
- settlement
- built up area
- national park
- parks and reserves
- state forest and reserves
- private reserves
- proposed development
- caravan park
- tourist points of interest
- camping area
- look out
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appendix 2
preliminary environmental and cultural heritage assessment



1 Introduction

A preliminary assessment of the environmental and cultural constraints on development in the study area has been undertaken through desk-top research and initial consultation with stakeholders.

This assessment has resulted in broad constraints mapping which is discussed below. This incorporates a collation of the relevant mapping layers which have been obtained to date.

The results of this task are sufficient to provide an understanding of the key issues and the likely “danger” areas for development.

1.1 Matters of National Environmental Significance

Desktop research has focussed on high-level designations, to include matters of national environmental significance (MNES) covered by the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act); such as World Heritage Properties, National Heritage Places, Wetlands of International Importance (Ramsar sites), Threatened Ecological Communities and Threatened or Migratory Species.

1.2 Other environmental and cultural resources

This preliminary assessment has also begun to gather information on other known sites/areas of environmental and cultural significance for which spatial information has been obtained to date, for example from the Tasmanian Natural Values Atlas, the Atlas of Living Australia, Birddata, the Forest Practices Authority (FPA) Biodiversity Values Database, TASVEG the Register of the National Estate (now defunct) and the Tasmanian Heritage Register.

The current assessment will be supplemented with additional information to produce a comprehensive picture of the environmental and cultural resources of the study area during the preparation of component 2 of the project – *Protecting Biodiversity and Cultural Heritage*.

1.3 Initial stakeholder consultation

Initial stakeholder consultation has also been undertaken to introduce the project, gain an initial impression of each stakeholder group’s concerns and aspirations and determine how best to proceed with further consultation during the preparation of component 2 of the project.

1.4 Environmental considerations

1.4.1 Methodology

Information sources

The information on natural heritage (flora and fauna, biodiversity) presented below has been gathered from the following sources:

- The Commonwealth Department of the Environment, via the Environmental Resources Information Network; and
- Department of Primary Industries, Parks, Water and Environment (DPIPWE) via the Tasmanian Natural Values Atlas (<http://www.naturalvaluesatlas.tas.gov.au>).

We expect that this will be refined and supplemented by information obtained from each of the municipalities in the study area; Dorset, Break O’Day and Glamorgan Spring Bay, as well as by the results of field work and further consultation.

Consultation

Initial consultation has been undertaken with the following:



- Dr Eric Woehler, Convenor, BirdLife Tasmania
- Allison Woolley, Louise Giffedder, Karen Bridges, Wendy Potts; Biodiversity Conservation Branch, Department of Primary Industries, Parks, Water and Environment (DPIPWE)
- Donna Stanley, Parks and Reserves Manager – North East Coast, Park and Wildlife Service.
- Planning, Natural Resource Management and Tourism staff from Break O'Day, Dorset and Glamorgan Spring Bay Councils
- Representatives of East Coast Regional Tourism Organisation and Tourism Northern Tasmania

1.4.2 Statutory natural heritage designations

Commonwealth Department of the Environment (DoE)

The objectives of the EPBC Act most relevant to the natural heritage assessment presented here are to:

- provide for the protection of the environment, especially Matters of National Environmental Significance
- conserve Australian biodiversity
- provide a streamlined national environmental assessment and approvals process
- enhance the protection and management of important natural and cultural places
- promote ecologically sustainable development through the conservation and ecologically sustainable use of natural resources
- recognise the role of Indigenous people in the conservation and ecologically sustainable use of Australia's biodiversity
- promote the use of Indigenous peoples' knowledge of biodiversity with the involvement of, and in cooperation with, the owners of the knowledge.

Under the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act), actions that have, or are likely to have, a significant impact on a matter of national environmental significance require approval from the Australian Government Minister for the Environment (the Minister). The Minister will decide whether assessment and approval is required under the EPBC Act. A person must not take an action that has, will have or is likely to have a significant impact on any of the matters of environmental significance without approval from the Australian Government Minister for the Environment (the Minister). An action is defined for the purposes of the EPBC Act as a project, a development, an undertaking, an activity or a series of activities, or an alteration of any of these things.

There are nine matters of national environmental significance protected under the EPBC Act, but the MNES as they relate to natural heritage matters for this project are as follows:

- wetlands of international importance (listed under the Ramsar Convention)
- listed threatened species and ecological communities
- migratory species protected under international agreements (CAMBA, JAMBA, ROKAMBA)

There are three Ramsar sites within the study area (Jocks Lagoon in Break O'Day; Moulting Lagoon and Apsley Marshes in Glamorgan Spring Bay). The following table summarises the threatened ecological communities and species, and migratory species, listed under schedules of the EPBC Act, and which are either known or regarded as likely to occur within the study area.



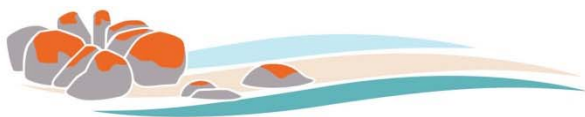


Table 3: Threatened ecological communities and species, and migratory species listed under schedules of the EPBC Act:

		DORSET		BREAK O'DAY		GLAMORGAN SPRING BAY		
		Precinct 1	Precinct 2	Precinct 3	Precinct 4	Precinct 5	Precinct 6	Precinct 7
Ramsar sites	Jocks Lagoon	-	-	+		-	-	-
	Moulting Lagoon Game Reserve	-	-	-		-	+	-
Aps	ley Marshes	-	-	-		-	+	-
Threatened Communities	Eucalyptus ovata - Callitris oblonga Forest (Vulnerable)	-	L			L		
	Alpine Sphagnum Bogs and Associated Fens (Endangered)	L	L			L		
	Giant Kelp Marine Forests of South East Australia (Endangered)	L	L			L		
	Lowland Native Grasslands of Tasmania (Critically Endangered)	+	-			+		
Threatened Species	Birds	25	27			27		
Crust	aceans	3	1			0		
Fish		3	5			4		
Frogs		1	1			1		
I	nsects	2	5			3		
Mammals		6	7			6		
Plant	s	19	35			39		
Rept	iles	2	1			1		
Sharks		1	1			1		
Ot	her	0	2			1		
Migratory Species		51	47			43		

Tasmanian Threatened Species Conservation Act 1995

The Tasmanian Threatened Species Protection Act 1995 (TSP Act), is an act of the Parliament of Tasmania that provides statutory protection to flora and fauna within Tasmania. At this overview stage, species or communities listed under the TSP Act have not received close attention, and the report is focused on MNES as an overarching conservation of biodiversity framework. In later stages of the project, and on a site specific basis, TSP Act listed biodiversity will be assessed in conjunction with MNES.

Modelling of areas of High Conservation Significance

The Commonwealth DoE has carried out spatial modelling of areas of High Conservation Significance (HCS) for MNES over parts of Tasmania which include the local government areas within this study area. For this overview study, a GIS analysis which clipped areas of HCS mapping within the study area, was used as a proxy for constraint mapping with respect to MNES (see the following Figure). Areas shown in yellow represent higher rankings of HCS, and therefore probable greater constraint for matters of MNES. As the colour grades to green, lower HCS ranking is indicated, and probable lower constraint for MNES.

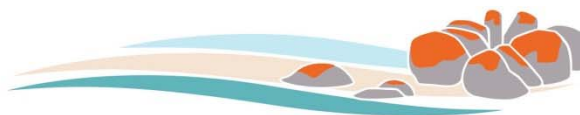
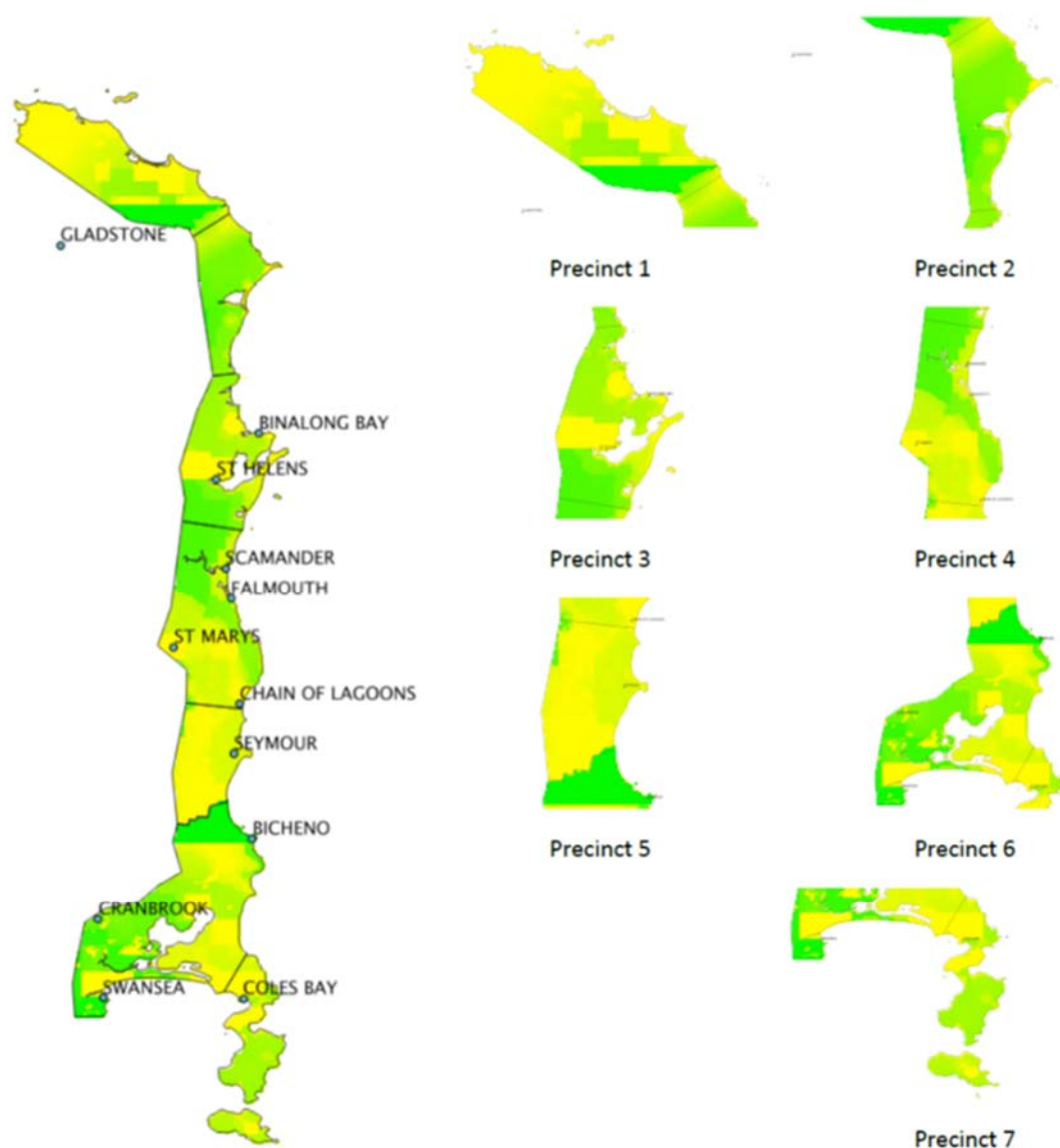


Figure 4: Modelled spatial ranking of high conservation values for Matters of National Environmental Significance



Note: Areas of highest ranking (highest potential MNES constraint) are in yellow; lowest ranking (potentially lower MNES constraint) in green. Derived from Australian Government Department of the Environment (2014) modelled data 'Spatial Prioritisation of the High Conservation Values for Matters of National Environmental Significance under the EPBC Act'.

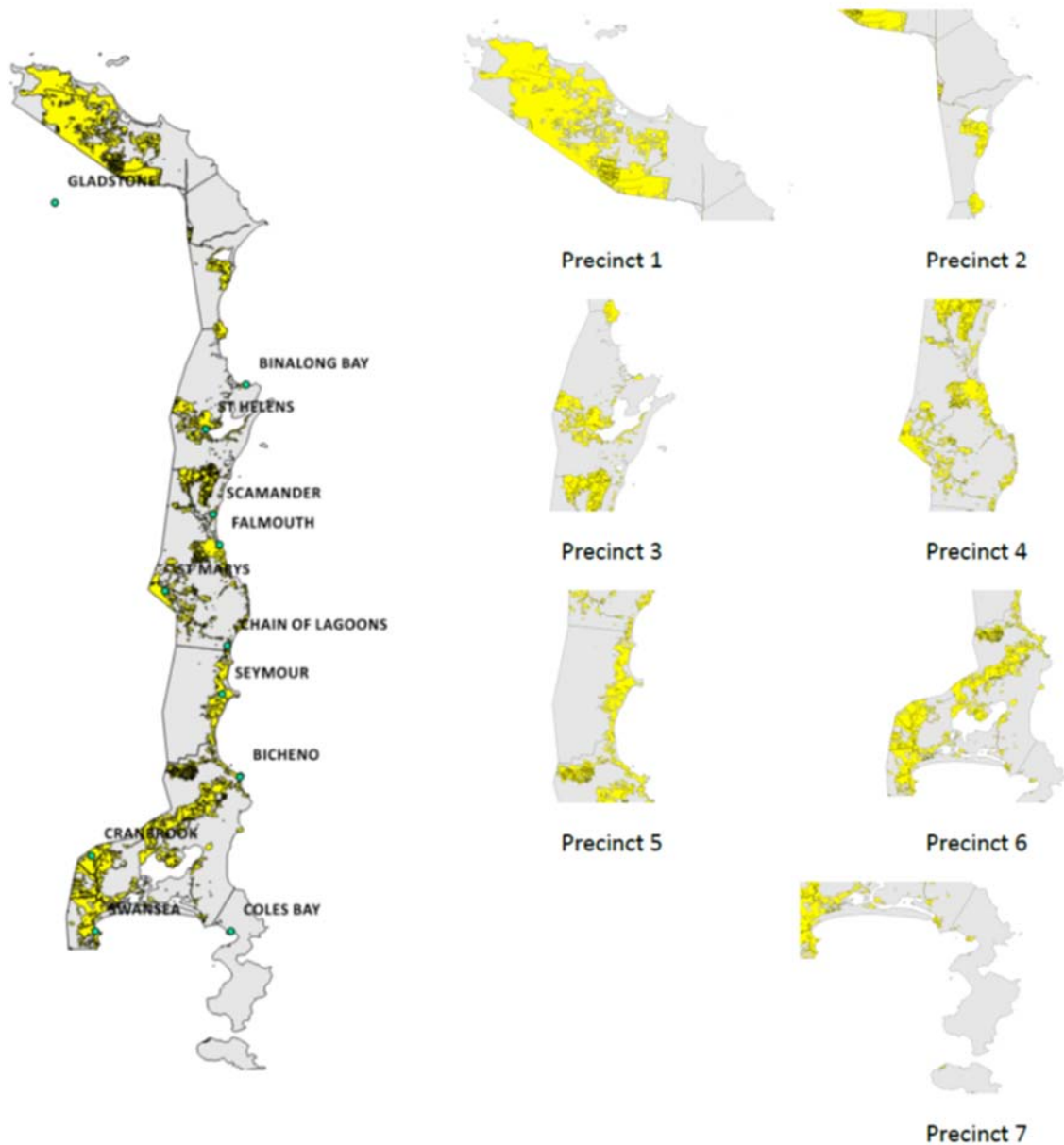
TASVEG

Detailed spatial modelling and mapping of the cover of different vegetation types and cover has been carried out by the Tasmanian DPIPW, and is available on such public online data portals as the Tasmanian Natural Values Atlas and The List. The vegetation mapping in its current incarnation is known as TASVEG 3.0 (2013). For this overview study, a GIS analysis which clipped areas of TASVEG mapping within the study area, was used as a proxy for constraint mapping with respect to natural and non-natural vegetation. Mapping of 'Agricultural, urban and non-native vegetation' is presented in the following Figure; where areas shown in yellow represent non-natural vegetation cover and therefore areas of potential lower environmental constraint for development.





Figure 5: Areas of non-native vegetation (agricultural, urban and exotic vegetation)



Source: Department of Primary Industries, Parks, Water and Environment. TASVEG 3.0, Released November 2013. Tasmanian Vegetation Monitoring and Mapping Program, Resource Management and Conservation Division

1.4.3 Natural heritage in the study area

The following section describes the natural heritage that has been identified in the study area by desktop assessment to date. This account is not exhaustive as several sources of information remain to be obtained, and more detailed field verification carried out.

As stated, the sources presented above provide an incomplete picture of the natural heritage (of other than MNES status) in the study area.



Both the HCS modelling and native/non-native vegetation modelling reflect a trend for the study area at large to contain more sensitive values on and within a kilometre or so of the coast (see the preceding Figures). This is partly a reflection of the bias within the MNES/HCS modelling towards Ramsar sites (which in this area are all coastal) and for the well-documented HCS values associated with the Ramsar sites and ocean beaches and estuaries – namely migratory and non-migratory shorebirds (waders) and waterbirds.

Tasmania is uniquely placed amongst Australian states in having very well documented natural values mapping relating to wetlands and coastlines, and for mapping of feeding, roosting and breeding sites for coastal shorebirds and waterbirds (Dr Eric Woehler pers. comm., April 2014). The level of documentation for the study area is high, and local government authorities have for example utilised shorebird mapping in evidence-based policy making with respect to 'off leash' zones for dogs on beaches.

Although non-native vegetation in places follows river valleys up from population hubs on the coast, much of it in the study area is on the coastal plain and associated with townships.

1.4.4 Moving forwards

The clustering of areas of High Conservation Significance for biodiversity of MNES status along the coastline and close environs needs to be taken into account in the identification of sustainable options for tourism development. Close involvement of stakeholders and technical experts within government (Tasmanian and local) and non-government organisations (e.g. BirdLife Tasmania) will be essential in finding a way forward; particularly in regard to a coastal walking trail which may notionally traverse sensitive areas now remote from human population centres.





1.5 Cultural heritage considerations

1.5.1 Methodology

Information sources

The information on cultural heritage presented below has been gathered from the following sources:

- The Commonwealth Department of the Environment, via the Environmental Resources Information Network; and
- Heritage Tasmania.

It is envisaged that this will be refined and supplemented by information obtained from Aboriginal Heritage Tasmania and each of the municipalities in the study area; Dorset, Break O' Day and Glamorgan Spring Bay, as well as by the results of field work and consultation.

Consultation

Initial consultation has been undertaken with the following:

- Chris Bonner, Regional Heritage Advisor at Heritage Tasmania
- Karen McFadden, Senior Archaeologist and Manager of Operations at Aboriginal Heritage Tasmania⁴
- Donna Stanley, Parks and Reserves Manager – North East Coast, Park and Wildlife Service.
- Planning, Natural Resource Management and Tourism staff from Break O'Day, Dorset and Glamorgan Spring Bay Councils
- Representatives of East Coast Regional Tourism Organisation and Tourism Northern Tasmania

1.5.2 Statutory cultural heritage designations

Commonwealth Department of the Environment (DoE)

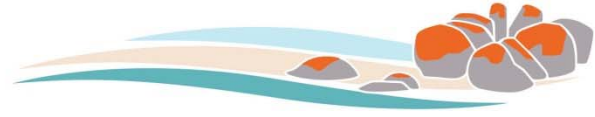
The EPBC Act enhances the management and protection of Australia's heritage places, and provides for the listing of natural, historic or Indigenous places that are of outstanding national heritage value to the Australian nation. The National Heritage List (NHL) was established under the *Environment Protection and Biodiversity Conservation (EPBC) Act 1999* to include places that are of outstanding national heritage value, and the Act is also the primary legislative vehicle for the management of Australia's World Heritage Areas (WHAs). The Minister for the Environment is thus responsible for World Heritage properties and places on the National Heritage List (NHL).

The Act imposes requirements on place managers to avoid actions that will or could have a detrimental impact on the heritage values of WHA and NHL listed places without the approval of the Minister. The onus is on the manager to refer actions which are likely to impact on these values to the Minister, for assessment by the DoE, or alternatively the Minister could decide to 'call in' any application which he feels may present such an impact. Actions will only be approved following environmental assessment or in the event that some other provision in the EPBC Act allows the action to be taken.

Environmental assessments required by the Act can be based on a variety of sources including preliminary documentation, public environment reports, environmental impact assessments or public inquiries, depending on the scale of the project. Approvals can take the form of bilateral agreements and declarations, Ministerial declarations or permits.

The EPBC Act also protects places included on the Commonwealth Heritage List (CHL) which is a list of natural, Indigenous and historic heritage places owned or controlled by the Australian Government. These include places connected to defence, communications, customs and other government activities that also reflect Australia's

⁴ On the advice of Aboriginal Heritage Tasmania, we have advised Break O' Day Council to approach the Tasmanian Aboriginal Heritage Council to introduce the project and open channels for consultation.



development as a nation. However, the CHL is an inclusive list and, unlike WHAs and NHL places, inclusion on the CHL does not reflect a particular level of significance.

The Act also protects the wider environment when Commonwealth agencies are proposing to undertake an action that may affect it.

Tasmanian Heritage Register & Tasmanian Heritage Place Inventory

The Tasmanian Heritage Register (THR) provides a listing of places or objects, including buildings, structures, areas/precincts and plantings/trees. Such places have been assessed as being of State Cultural Heritage Significance using assessment criteria established by the Tasmanian Heritage Council. The Tasmanian Heritage Place Inventory (THPI) lists all known buildings, archaeological sites and relics, including submerged features, shipwrecks and cultural landscapes, located within land managed by the Parks and Wildlife Service Tasmania. Places may be on one or both lists.

All places on the THR are legally protected under the *Historic Cultural Heritage Act 1995* with places on the THPI accorded protection under the *Historic Cultural Heritage Act 1995*, *Nature Conservation Act 2002*, *Threatened Species Protection Act 1995*, *Aboriginal Relics Act 1975* and federal protection under the *Historic Shipwrecks Act 1975*. Penalties apply for actions that may damage a place listed on the THR or THPI.

The THR is administered by Heritage Tasmania and the THPI by the Parks and Wildlife Service Tasmania. Both are part of the State's Department of Primary Industries, Parks, Water and Environment (DPIPWE).

Tasmanian Heritage Register

Works to a registered place require either a permit or certificate of exemption from the Tasmanian Heritage Council. Applications for a permit or exemption are made to the Tasmanian Heritage Council through Heritage Tasmania. Applications must be made on the prescribed form and *must* be supported by accompanying details and plans of the proposed works, an assessment of the heritage impacts and any other relevant supporting documentation. The form asks for details of the place, applicant details, description of the works, and owner consent.

Tasmanian Heritage Place Inventory

The THPI is a database that details all heritage sites located within areas owned and administered by the Parks and Wildlife Service. As a result, places in the database may be included on both the THR and the Tasmanian Aboriginal Site Index (TASI – see below) and are therefore afforded the same protection as places identified on either of these registers or indexes.

Tasmanian Aboriginal Site Index (TASI)

The TASI is a database that contains location information on almost 12,000 recorded Aboriginal sites within Tasmania. The database contains information relating to these sites including site cards, photographs, slides, location data, site composition, and associated Aboriginal heritage assessment reports.

Places included Aboriginal heritage significance recorded on the TASI, are legally protected under the *Aboriginal Relics Act 1975*. Under this Act, no person is permitted to undertake works which will affect a TASI site, other than in accordance with the terms of a permit issued by the Minister on the recommendation of the Director.

Planning Scheme Heritage Schedules

Heritage schedules within Planning Schemes identify places of significance within a local municipality. This process is managed through the Planning Schemes by the Local Government Authority under the provisions of the *Land Use Planning and Approvals Act 1993*.

Each of the municipalities within the study area; Dorset, Break O'Day and Glamorgan Spring Bay, is known to retain a list of locally significant places.





1.5.3 Other relevant heritage lists

Register of the National Estate

The Register of the National Estate (RNE) was established under the *Australian Heritage Commission Act 1975* (repealed), and then supported under by the EPBC Act and the *Australian Heritage Council Act 2003*. It was a national inventory of more than 13,000 natural and cultural heritage places, including many places of local or state significances, compiled by the now defunct Australian Heritage Commission and then kept by the Australian Heritage Council. The RNE was maintained until February 2012 but frozen in February 2007 and it is now no longer a statutory list. The intention was that it be superseded by other heritage lists – many (but not all) of the places included on the RNE are now included on the registers described above.

National Trust of Australia (Tasmania) Register

The National Trust of Australia (Tasmania) Register of Classified and Registered Buildings provides a list of places that are either listed or classified by the Trust. Classification or listing by the Trust does not impose any legal restrictions on property owners or occupiers and the Trust does not have any statutory legal powers.

Australian Institute of Architects (Tasmanian Chapter) Register

The Australian Institute of Architects (Tasmanian Chapter) Twentieth Century Buildings for the National Estate Register is a register of notable buildings that were recommended for inclusion by the Institute on the now archived Register of the National Estate. While this parent register is no longer maintained, it is the intention of the Institute to maintain and further develop their register as part of their ongoing advocacy work.

1.5.4 Cultural heritage in the study area

The following describes the cultural heritage that has been identified in the study area by desktop assessment to date.

This account is by no means exhaustive as several sources of information remain to be obtained.

Matters of National Environmental Significance

As described above, under the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act), actions that have, or are likely to have, a significant impact on a matter of National Environmental Significance require approval from the Australian Government Minister for the Environment (the Minister). The Minister will decide whether assessment and approval is required under the EPBC Act.

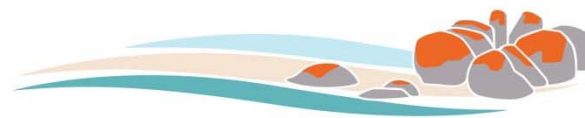
The cultural heritage Matters of National Environmental Significance (MNES) protected under the EPBC Act are:

- World Heritage Properties
- National Heritage Places.

There are no places within the study area that are included on either of these lists, and thus no cultural heritage MNES within the study area.

NOTE: Notwithstanding the above, the following should be noted:

- Although there are no World Heritage Properties, or parts of such properties, within the study area, the study area is known to contain sites relating to Tasmania's convict heritage. It is possible that these sites – such as those relating to coal mining around Bicheno (which are not included in the lists below) could be included in the Australian Convict Sites serial World Heritage listing.
- The following places have previously been nominated for inclusion on the NHL but not subsequently included (these are not included in the lists and mapping below):



Place nominated for NHL but not included	Address
Blue Tier Forest Reserve and Bay of Fires Conservation Area	Ansons Bay
Four Shacks near Binalong Gulch	Binalong Bay Road, Binalong Bay

Other cultural heritage (incomplete)

The following sets out the information relating to cultural heritage in the study area that has been obtained to date.

It sets out information included on the following registers, by Precinct of the study area:

- The Commonwealth Heritage List (CHL)
- Only two CHL places lie in the study area. Both of these are also on the below lists.
- Tasmanian Heritage Register (THR)
- A number of THR places are located in the study area. Almost all of these are historic buildings and the large majority of these are located in the settlements.
- Register of the National Estate (RNE).

The RNE is now frozen and no longer a statutory list, but in the current absence of alternative information it provides a good indication of the areas of the places possessing heritage values in the study area. The register contains places of 'historic' (i.e. non-Indigenous), 'Indigenous' and 'Natural' significance. Although the latter is likely to repeat some of the information listed above under 'Environmental Considerations', and it is the areas of natural significance that cover the larger areas, these places have been included for completeness sake (but separated in each of the following tables).

Precinct 1

The following CHL places are located in Precinct 1

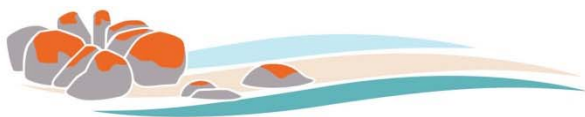
Place ID	Name	Class	Status	Area ha	Address
105598	Swan Island Lighthouse*	Historic	Listed place	0.080123	Gladstone TAS

*also on RNE and THR – see below

The following RNE places are located in Precinct 1

Place ID	Name	Class	Status	Address	Area ha
Historic places					
None					
Indigenous places					
12663	Boulder Point Sites	Indigenous	Registered	Gladstone	118.069
12665	Cape Naturaliste Sites	Indigenous	Registered	Gladstone 165.6	15
15330	Musselroe Point Area	Indigenous	Registered	Gladstone	42.4057
18136	Cape Portland Aboriginal Area	Indigenous	Indicative Place	Gladstone	869.238
Natural places					
12656	Mt William National Park Natura	I	Registered	Gladstone	13773.26
12668	Cape Portland Conservation Area Natura	I	Registered	Gladstone	817.035
12675 Swan	Island	Natural	Registered		240.084



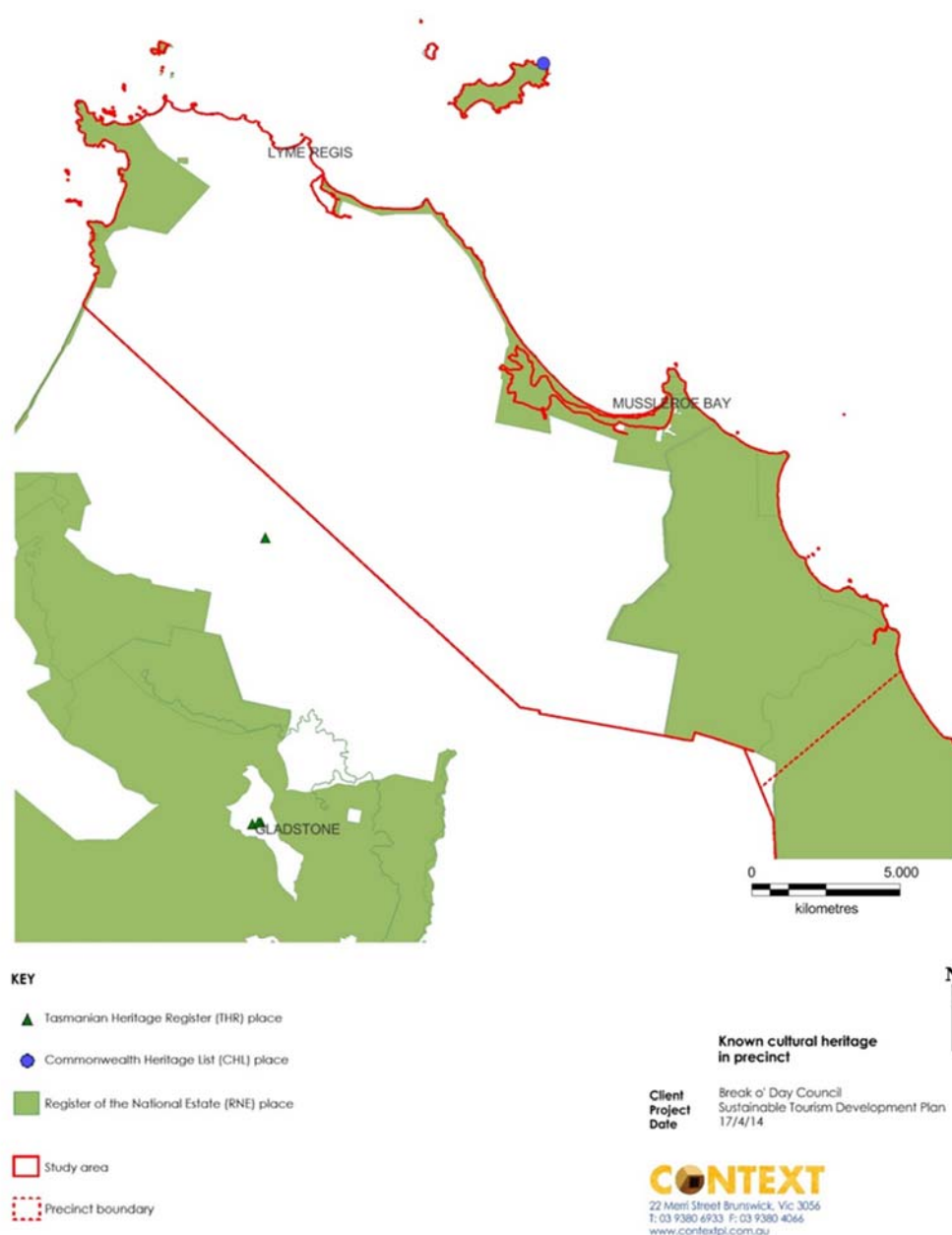


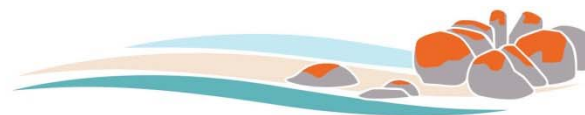
14101	Cape Portland Geological Monuments	Natural	Registered	Gladstone 27.00	51
102398	Mount William Area	Natural	Indicative Place	Gladstone	23288.3
102404	Ringarooma Coastal Reserve	Natural	Indicative Place	Tomahawk 154	1.4

The following THR places are located in Precinct 1

THR ID	Name	Address
1418	Swan Island Light Station	-

Figure 6: Known Cultural Heritage in Precinct 1





Precinct 2

The following CHL places are located in Precinct 2

Place ID	Name	Class	Status	Area ha	Address
105565 Eddystone	Eddystone Lighthouse*	Historic	Listed place	0.020661	Eddystone Rd, Gladstone TAS

*also on RNE and THR – see below

The following RNE places are located in Precinct 2

Place ID	Name	Class	Status	Address	Area ha
Historic Places					
102870 Eddystone	Eddystone Lighthouse	Historic	Registered	Eddystone Rd, Gladstone	0.032384
Indigenous Places					
12658	Bay of Fires Area	Indigenous	Registered	Ansons Bay	24.9215
12664	Bayley Rock Site	Indigenous	Registered	Gladstone	29.7178
Natural Places					
12656	Mt William National Park Natural	Natural	Registered	Gladstone	13773.26
12660	Eddystone Lighthouse Original Reserve & Surrounds	Natural	Registered	Eddystone Rd, Gladstone	11.5735
102398	Mount William Area	Natural	Indicative Place	Gladstone	23288.3

The following THR places are located in Precinct 2

THR ID	Name	Address
599	Eddystone Light Station	2986 Eddystone Point Rd



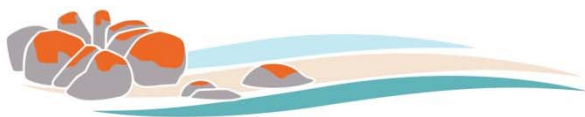
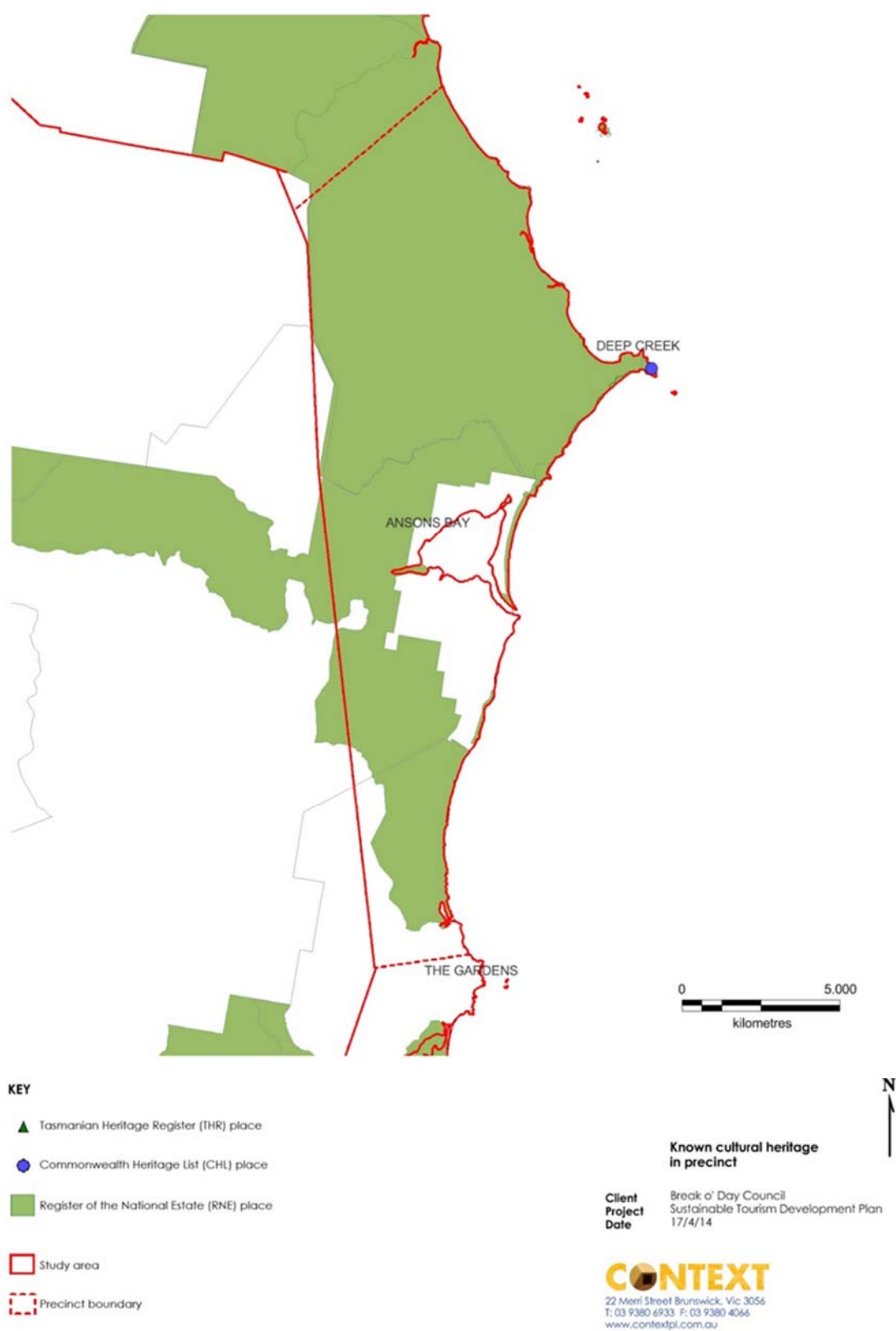
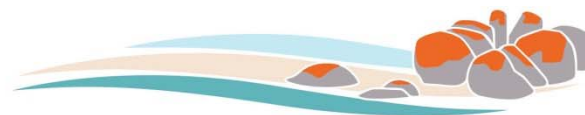


Figure 7: Known Cultural Heritage in Precinct 2





Precinct 3

No CHL places are located in Precinct 3

The following RNE places are located in Precinct 3

Place ID	Name	Class	Status	Address	Area ha
Historic Places					
None					
Indigenous Places					
None					
Natural Places					
12659	Medeas Cove Conservation Area	Natural	Registered	St Helens	73.2785
12662	St Helens Point Lagoons Area	Natural	Registered	St Helens Point Rd, Stieglitz	554.427
12666	Dianas Basin Geological Monument	Natural	Registered	St Helens	0.032363
102382 Mount	Echo	Natural	Indicative Place	St Helens	356.628
102387	Mount Pearson Area	Natural	Indicative Place	St Helens	9742.44
102389 St	Helens Point	Natural	Indicative Place	Stieglitz	859.24

The following THR places are located in Precinct 3

THR ID	Name	Address
590	Black Swan Inn	Binalong Bay Rd
593	Former Post Office	44 Cecilia St
594	St Paul's Anglican Church	58 Cecilia St
595	Shop	60 Cecilia St
597	Fairlea Homestead	12-14 Tasman Hwy
598	Queechy Homestead	Tasman Hwy



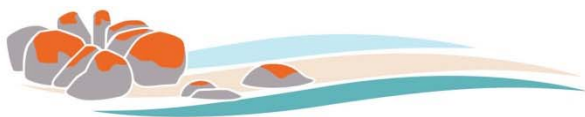
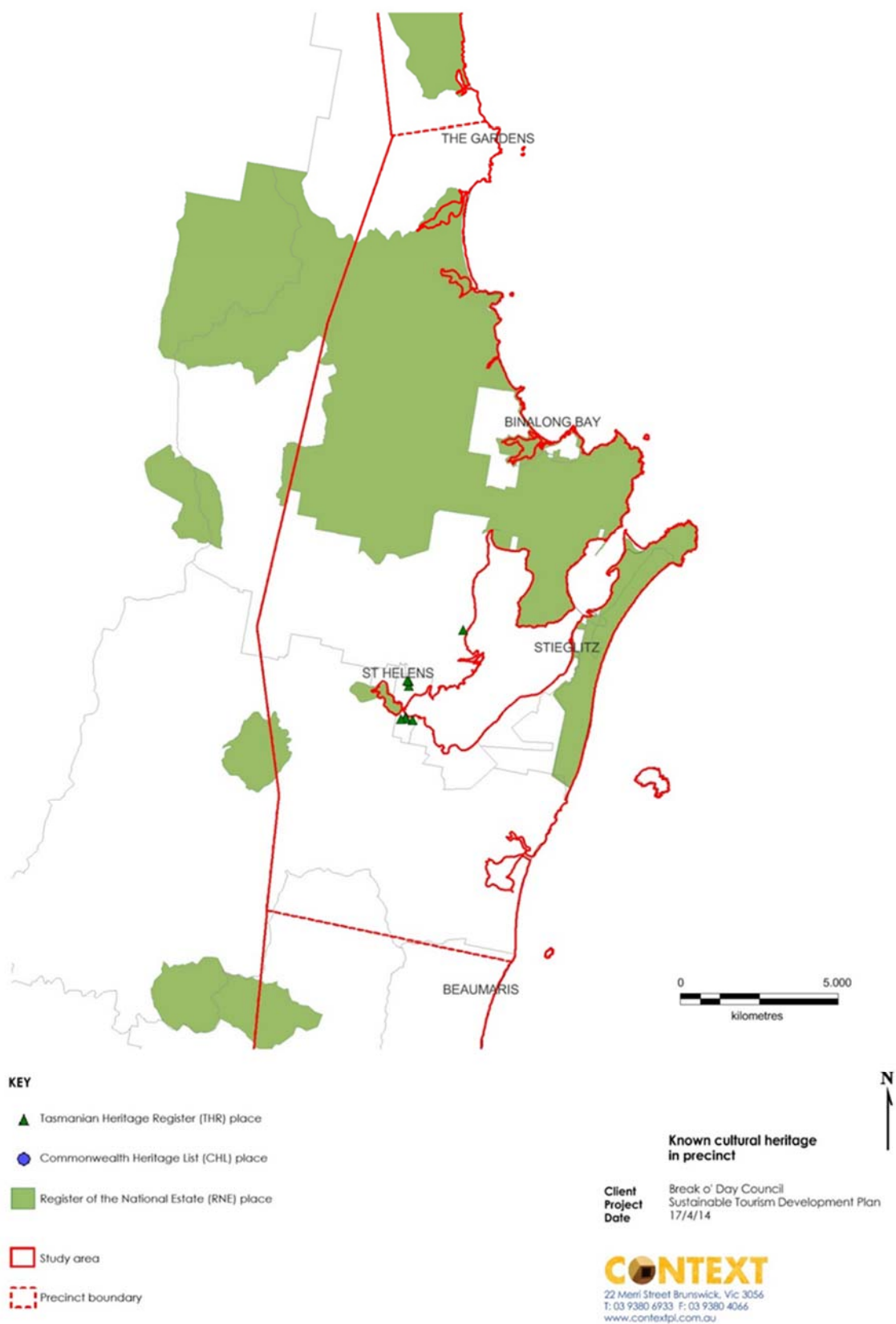


Figure 8: Known Cultural Heritage in Precinct 3





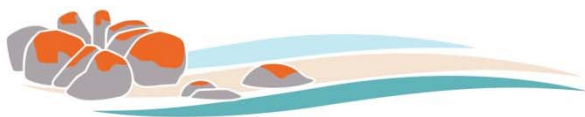
Precinct 4

No CHL places are located in Precinct 4

The following RNE places are located in Precinct 3

Place ID	Name	Class	Status	Address	Area ha
Historic Places					
12549	St Marys Hotel	Historic	Registered	Main St, St Marys	0.032343
12558	St Marys Railway Station	Historic	Registered	Esk Main Rd, St Marys	0.032338
100063	Slab Slaughter House	Historic	Registered	Tasman Hwy, St Marys	0.032345
100415	Falmouth Cemetery	Historic	Indicative Place	New St, Falmouth	0.032349
Indigenous Places					
16091	St Patricks Foreland Area	Indigenous	Registered	Falmouth	0.921788
16092	Shelley Point	Indigenous	Registered	Tasman Hwy, Scamander	13.5331
Natural Places					
12522	St Patricks Head State Reserve Natural	I	Registered	St Marys	153.251
12523	St Marys Pass State Reserve	Natural	Registered	Tasman Hwy, St Marys	297.907
12561	Lower Marsh Creek Area	Natural	Registered	Tasman Hwy, St Marys	446.761
100502	Henderson Lagoon Coastal Area	Natural	Registered	Tasman Hwy, Falmouth	396.816
101090	Mount Elephant Velvet Worm Habitat	Natural	Indicative Place	Elephant Pass, St Marys	1943.12
102364	German Town Area	Natural	Indicative Place	St Marys	1040.27
102366	Little Beach Creek - Lower Marsh Creek Area	Natural	Indicative Place	St Marys	2909.13
102367	St Marys Pass - St Patricks Head Area	Natural	Indicative Place	St Marys	1710.96
102369	Bare Rock Area	Natural	Indicative Place	St Marys	613.077
102372	Douglas Apsley Area	Natural	Indicative Place	Seymour	22341.97
102385	Skyline Tier Area	Natural	Indicative Place	Scamander	217.636
102386	Lower Skyline Tier Area Natural	I	Indicative Place	Scamander	894.245



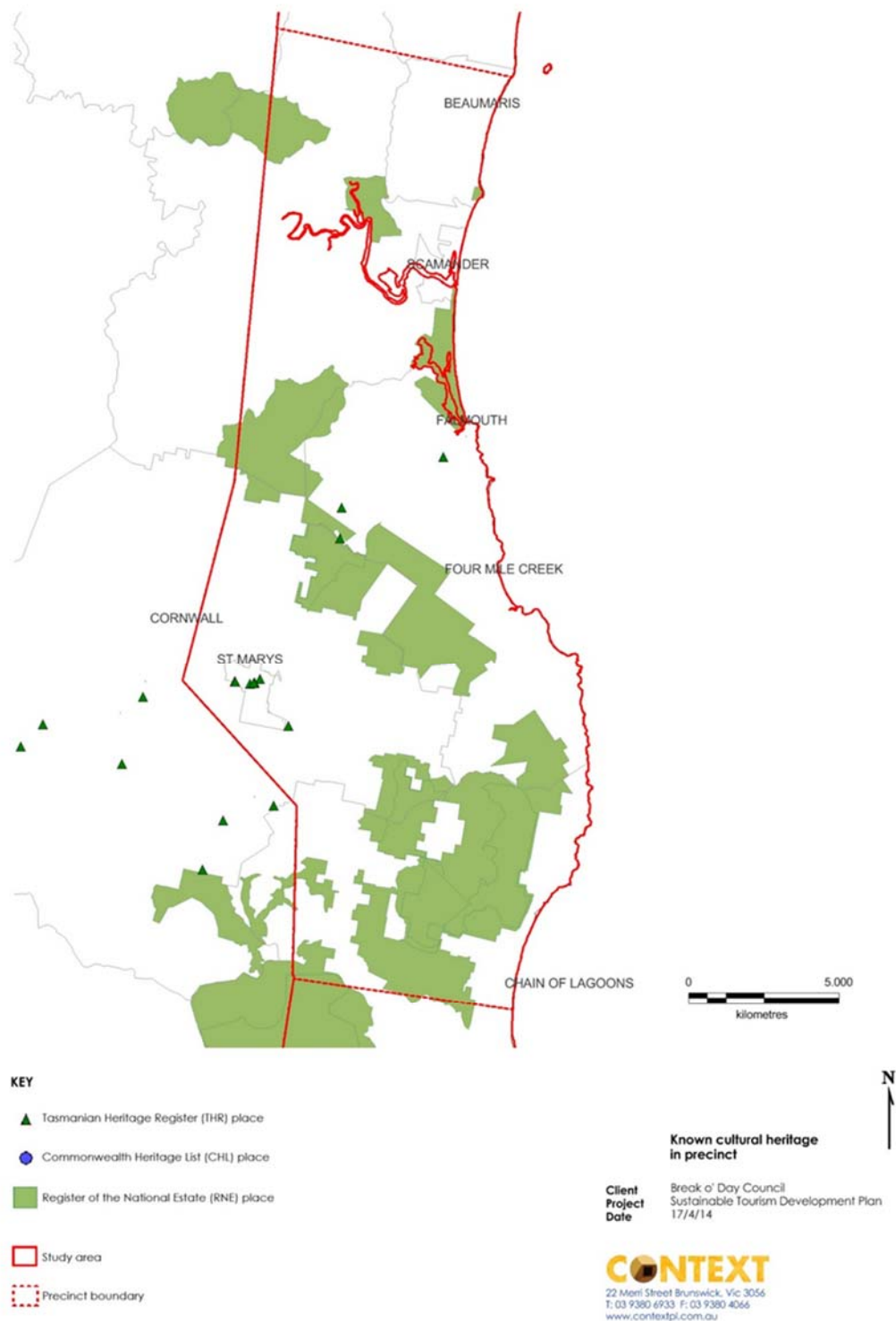


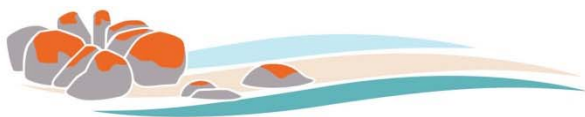
The following THR places are located in Precinct 4

THR ID	Name	Address
553 Enston	e Park	22746 Tasman Hwy
554 Gle	ncoe	Tasman Hwy
606	Bakery	62 Main St
607	House	50 Main St
610	Valley Trading Co.	38 Main St
612	St Mary's Hotel	48 Main St
613	Railway Station	Esk Main Rd
5906	Slab Slaughter House	Gray Rd
10740	St Marys Railyard, including tank, platform & loading ramp	Esk Main Rd



Figure 9: Known Cultural Heritage in Precinct 4





Precinct 5

No CHL places are located in Precinct 5

The following RNE places are located in Precinct 5

Place ID	Name	Class	Status	Address	Area ha
Historic Places					
None					
Indigenous Places					
None					
Natural Places					
11744	Douglas River Area	Natural	Registered	Seymour	14218.27
12564	Piccaninny Point Geological Monument	Natural	Registered	Seymour	6.11251
102372	Douglas Apsley Area	Natural	Indicative Place	Seymour	22341.97

No THR places are located in Precinct 5

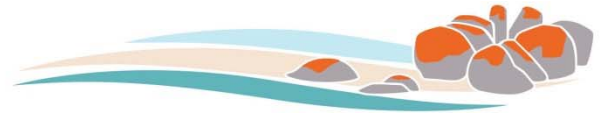
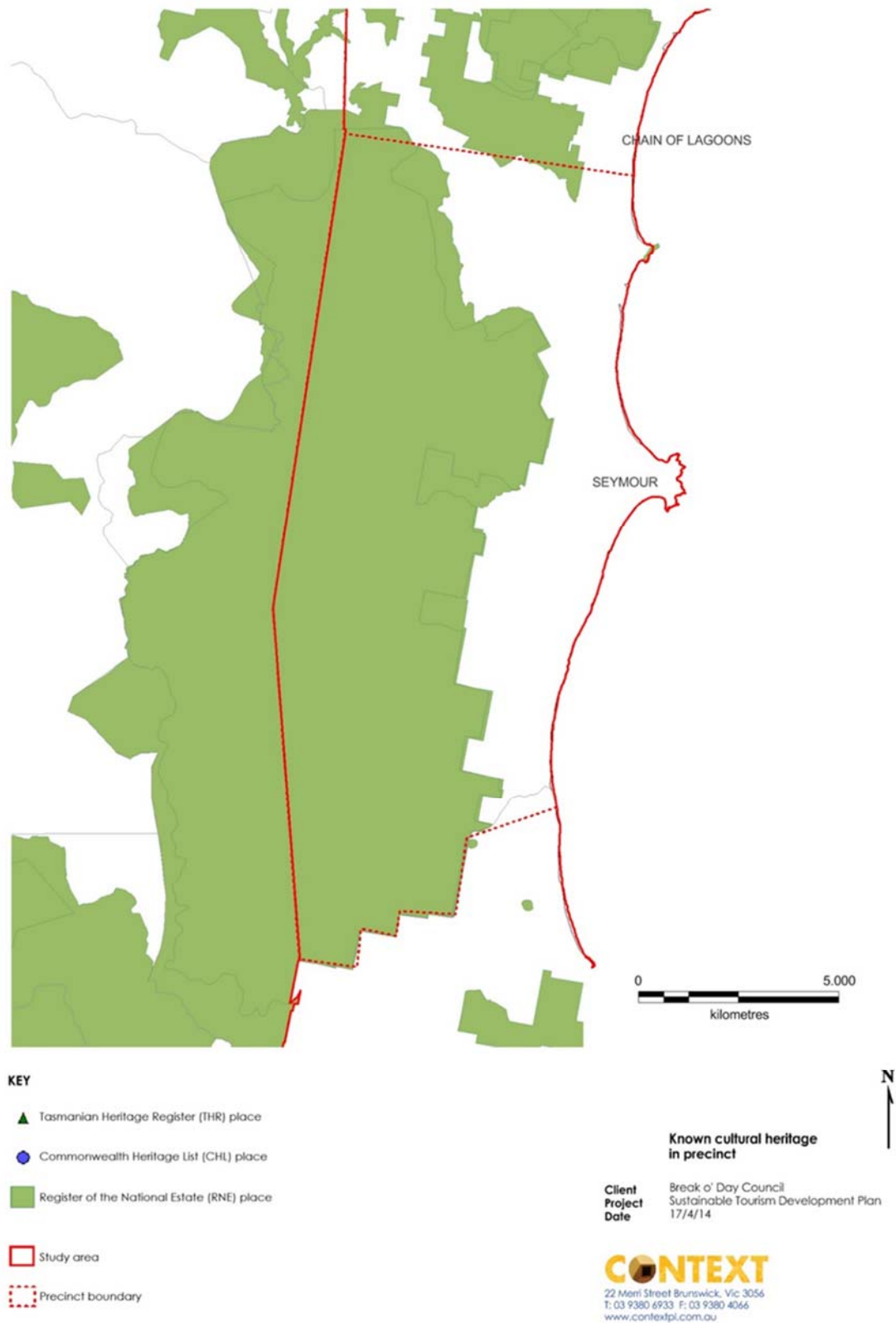
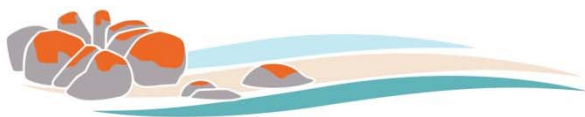


Figure 10: Known Cultural Heritage in Precinct 5





Precinct 6

No CHL places are located in Precinct 6

The following RNE places are located in Precinct 6

THR ID	Name	Address
1488	Waubadebar's Grave	52 Burgess St
1490	Court House and Watch House	83 Burgess St
1491	Bicheno Uniting Church	53 Burgess St
1492 C	emetery Morris	on St
1494	Apsley House	16182 Tasman Hwy
1495	Former Apslawn House	16182 Tasman Hwy
1497 Llan	daff Cemetery Tasman	Hwy
1498	Coal Bin	[Coastal Reserve Adjoining The Esplanade at Waubs Gulch]
1511 Swan	wick	68 Swanwick Rd
1512	Gala	82 Glen Gala Rd
1512	Cranbrook House	82 Glen Gala Rd
1514	The Grange	325 Grange Rd
1515	Spring Vale	130 Springvale Rd
1516	Craigie Knowe	80 Glen Gala Rd
1517	Gala Kirk and Cemetery	14876 Tasman Hwy
1518	Glen Gala	45 Glen Gala Rd
1521	Amos Family Cemetery	45 Glen Gala Rd
1539	Gemmells Cottage	2 Bridge St
1540	The Old Manse	9 Dove Lane
1541	House (Kimber, Lawn)	20 Franklin St
1542	House (Cusick, Wright)	56 Franklin St
1543 Comme	rcial Bank	7 Maria St
1544	Shaws Building, now Morey's Store	40 Franklin St
1545	Morris General Store	13-15 Franklin St
1547	Oyster Bay Holiday Lodge	10b Franklin St
1548	Abbotsford, former Rapsville, former Glen Morey	50 Gordon St
1550	Braeside	21 Julia St
1551	Miss Dilger's Cottage	7 Noyes St
1552	Laughton Cottage, now Meredith House	15 Noyes St
1553	Council Chambers and Court House	4 Noyes St
1554	St Andrew's Uniting Church	21 Wellington St
1555	Rockingham Villa	5 Noyes St
1556	Old School House and War Memorial	22 Franklin St

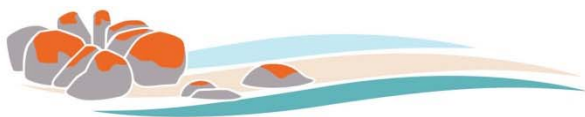


1557	Harbottles Cottage, also known as Bluff Cottage, former Caulfield Cottage	45 Shaw St
1559	Cambria	13566 Tasman Hwy
1560	Coswell	13054 Tasman Hwy
1564	Red Banks	13514 Tasman Hwy
1565	Riversdale House	14193 Tasman Hwy
1566	Riversdale Mill	14193 Tasman Hwy
1569	Wagners Cottage	100 Tasman Hwy
1571	The Springs	Springs Rd
1572	Plas Newydd	29 Wellington St
1573	All Saints Church and Church Hall	10 Noyes St
1574	Schouten House	2 Waterloo Rd

The following THR places are located in Precinct 6

Place ID	Name	Class	Status	Address	Area ha
Historic Places					
11676	Redbanks and Outbuildings	Historic	Registered	Tasman Hwy, Swansea	0.032291
11678 Gle	nheriot	Historic	Registered	Tasman Hwy, Cranbrook	0.03231
11680	Cranbrook House and Outbuildings	Historic	Registered	Glen Gala Rd, Cranbrook	0.032307
11682	Glen Gala House and Outbuildings	Historic	Registered	Glen Gala Rd, Cranbrook	0.032315
11684 Gal	a Kirk Histori	c	Registered	RA 14876 Tasman Hwy, Cranbrook	0.032307
11686	The Springs House	Historic	Registered	Springs Rd, Swansea	0.032301
11688 Riversd	ale Mill	Historic	Registered	RA 14193 Tasman Hwy, Swansea	0.032294
11690 Belm	ont House	Historic	Registered	RA 14106 Tasman Hwy, Swansea	0.03231
11692	Cambria Homestead and Outbuildings	Historic	Registered	Tasman Hwy, Swansea	0.032304
11696 Morris	General Store	Historic	Registered	13 Franklin St, Swansea	0.032306
11698	Glamorgan War Memorial Community Centre	Historic	Registered	Franklin St, Swansea	0.032298
11700 Cottage		Historic	Registered	7 Noyes St, Swansea	0.032375
11702 Rocking	ham Villa	Historic	Registered	5 Noyes St, Swansea	0.032377
11704	Glamorgan Municipal Offices & Courthouse (Former)	Historic	Registered	Noyes St, Swansea	0.032302
11706	All Saints Anglican Church	Historic	Registered	Noyes St, Swansea	0.032296
11708 Mere	dith House	Historic	Registered	15 Noyes St, Swansea	0.032301
11710 Plas	Newydd	Historic	Registered	29 Wellington St, Swansea	0.032293
11712 Scho	uten House	Historic	Registered	1 Waterloo Rd, Swansea	0.032295





11714 Bra	eside	Historic	Registered	21 Julia St, Swansea	0.032305
11716	Swan Motor Inn (Original Section)	Historic	Registered	Franklin St, Swansea	0.032286
11730	Gala Homestead, Outbuildings & Mill	Historic	Registered	Glen Gala Rd, Cranbrook	0.032299
11732	Apslawn House (Former) and Barn	Historic	Registered	Tasman Hwy, Apslawn	0.032314
11734	Apsley House, Outbuildings & Log Cabin	Historic	Registered	Tasman Hwy, Apslawn	0.032314
11736	Court House & Watch House (Former)	Historic	Registered	Burgess St, Bicheno	0.032317
11738	Wagners Cottage & Dry Stone Walls	Historic	Registered	Tasman Hwy, Swansea	0.032304
11740 The	Hermitage	Historic	Registered	Tasman Hwy, Swansea	0.03231
103793	Denison Rivulet Coal Mines Denison Rivulet Coal Mines	Historic	Indicative Place	Douglas River	10.2006
Indigenous Places					
11672	Waubadebars Grave Historic Site	Indigenous	Registered	Burgess St, Bicheno	0.032319
Natural Places					
11744	Douglas River Area	Natural	Registered	Seymour	14218.27
11745	Cherry Tree Hill - Blacks Creek Area	Natural	Registered	Cranbrook	526.886
11748	Apsley Marshes	Natural	Registered	Cranbrook	1061.49
14594	Lower Apsley River Callitris Site	Natural	Registered	Bicheno	12.6405
17654	Moulting Lagoon Game Reserve & Coles Bay Road Area	Natural	Registered	Cranbrook	4881.41
102292	Apsley Conservation Area	Natural	Indicative Place	Rosedale Rd, Bicheno	454.89
102372	Douglas Apsley Area	Natural	Indicative Place	Seymour	22341.97
102374 Gre	enlawn Hill	Natural	Indicative Place	Bicheno	171.772
102783	Buster Ridge Geohertiage Site	Natural	Indicative Place	Bicheno	0.125057
102786	Freycinet - Friendly Beaches Area	Natural	Indicative Place	Coles Bay Rd, Coles Bay	24827.23
102788 Biche	no Blowhole	Natural	Indicative Place	Esplanade Rd, Bicheno	0.125051

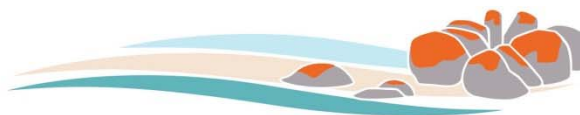
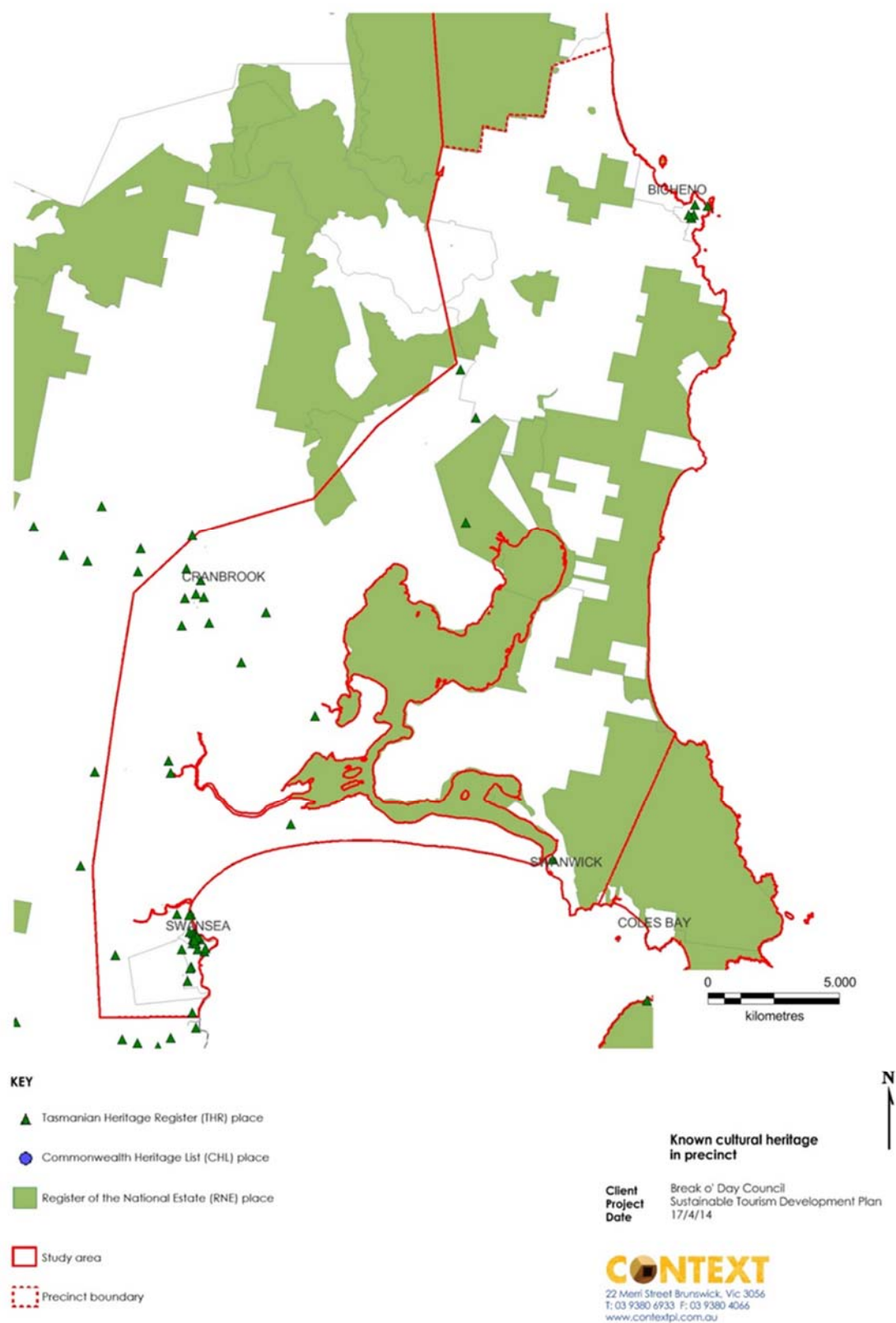
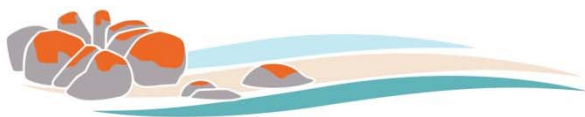


Figure 11: Known Cultural Heritage in Precinct 6





Precinct 7

No CHL places are located in Precinct 7

The following RNE places are located in Precinct 7

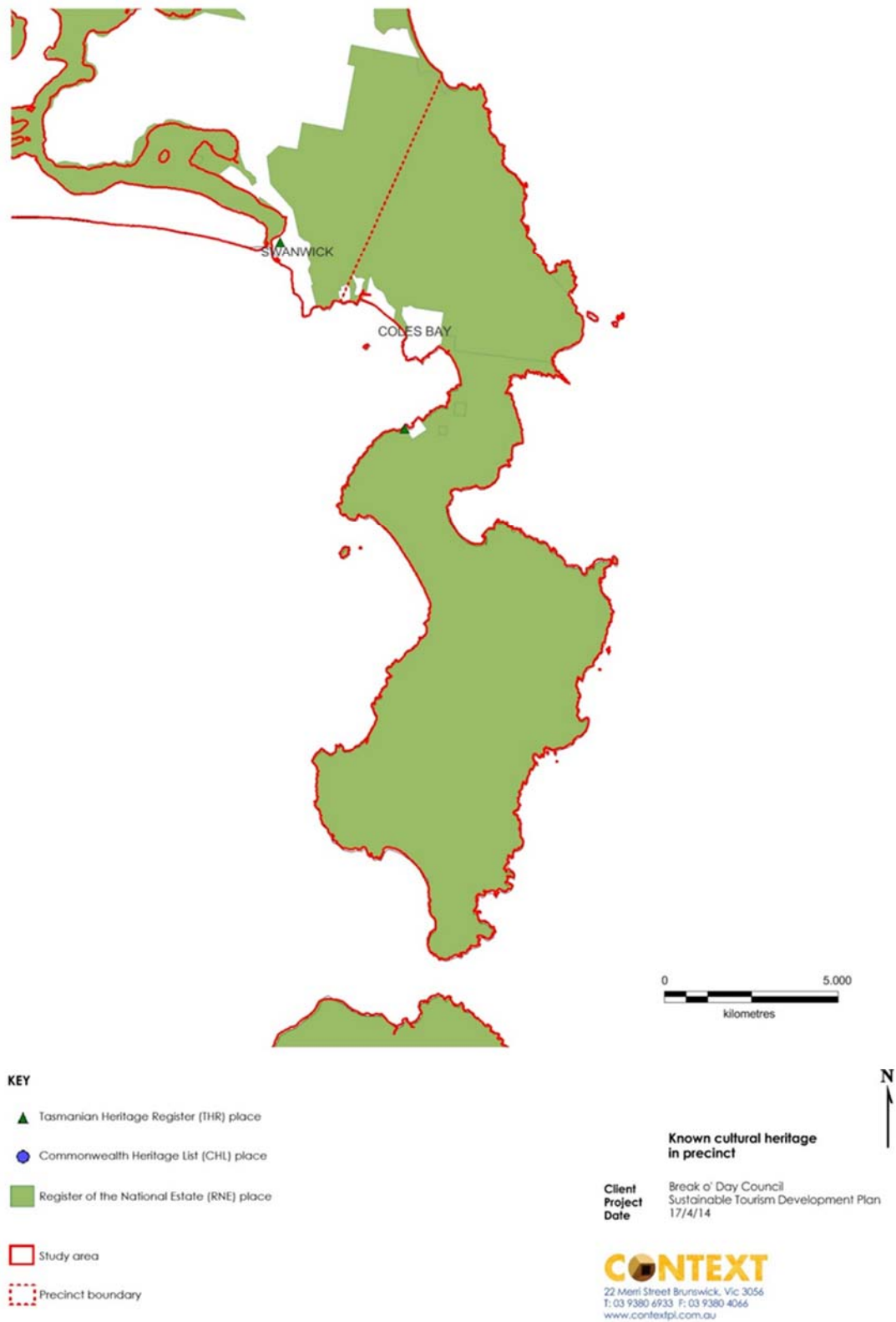
Place ID	Name	Class	Status	Address	Area ha
Historic Places					
None					
Indigenous Places					
15832	Bluestone Bay Area	Indigenous	Registered	Coles Bay	39.4258
Natural Places					
11673	Freycinet National Park Natura	I	Registered	Freycinet Dr, Coles Bay	9916.84
102786	Freycinet - Friendly Beaches Area	Natural	Indicative Place	Coles Bay Rd, Coles Bay	24827.23

The following THR places are located in Precinct 7

THR ID	Name	Address
10747	Former Quarrymen's Cottages/Now YHA Hostel	Parsons Lane



Figure 12: Known Cultural Heritage in Precinct 7





1.5.5 Additional major cultural heritage considerations

As stated, the sources presented above provide an incomplete picture of the cultural heritage (of less than MNES status) in the study area.

Non-Indigenous heritage

It is likely that additional information will be gathered in relation to non-Indigenous heritage places – in particular archaeological sites that are more likely to be known/recorded at a local level. However, the relatively low level of occupation and activity in the region since colonisation is such that these sites are likely to be fairly few in number and located around existing settlements or at isolated locations.

Indigenous heritage

A more pressing consideration is the known prevalence of Aboriginal heritage sites throughout the study area.

Aboriginal Heritage Tasmania's protocols in relation to the TASI system prevent the release of large amounts of data at one time, but it has been agreed that small-scale (low detail) mapping of known sites can be provided to determine general trends in relation to site location, and this would then be supplemented later in the project by more detailed site-specific searches. However, at the time of writing this information has yet to be provided.

The only large-scale studies of the Aboriginal archaeology of the study area were undertaken as part of a state-wide program in the 1980s and early 1990s (Brown 1991 & Kee 1991).

The site types identified in the region can be summarised as follows.

- Coastal sites - predominantly, but not exclusively, related to the exploitation of stone, shellfish and possibly other marine resources:
- Coastal dunes sites, located in the dunes fronting the foreshore, indicating that site location is associated with proximity to littoral resources
- Coastal plains sites, situated within an area up to one kilometre from the coast, with the highest distribution of sites generally confined to a narrow strip of plains, up to 100m away from the sea
- Coastal low hill sites, the majority recorded in coastal low hills located less than 500 m away from the shoreline
- Offshore islands.
- Inland sites – reflecting exploitation of terrestrial resources, as evidenced by the composition of the artefact assemblages at inland sites:
- Plains sites, reflecting temporary campsites utilised by groups who were most likely also visiting and exploiting resources of the neighbouring sea shore
- Low hill sites, predominantly comprising isolated artefact finds which would appear to result from transient hunting and gathering expeditions by small (hearth) groups
- Hill sites - there is fairly sparse evidence for occupation of hills, consisting of an extensive camp and a few rock shelter sites. However, poor visibility made it difficult to assess the extent of archaeological evidence in this landform.

The pattern of site distribution found in the region was one of high numbers of shell middens and open artefact sites along the coastal fringe, extending up to 100 m inland. Inland, a rapid decline in site density was observed, and this was especially notable from at least one kilometre from the coast.

It was noted by these studies that the majority of the Aboriginal sites in the region which were considered to be archaeologically significant are situated on land administered by what is now the Parks and Wildlife Service.

It should be noted that these studies relied almost entirely on surface surveys, with the majority of surveys conducted along the coast and the foothills of the highlands. The highlands were not surveyed in detail and the studies did not investigate the archaeological record of Aboriginal use of these forested highland areas. The much smaller numbers of artefacts recorded on inland sites may be attributable to a lack of surface visibility, and most of the findings have yet to be tested by subsurface examinations. However, the authors were of the opinion that some reliance can be placed on



the data as survey of inland locations relied on places where there was good surface visibility such as coupes, vehicle tracks and eroded areas.

1.5.6 Moving forwards

The prevalence of Aboriginal cultural heritage in the study area needs to be taken into account in the identification of sustainable options for tourism development. In particular, pathways for substantial consultation with the Aboriginal community need to be established in order to address the management of this material in appropriate fashion.

1.6 References

Brown S. 1991 *Aboriginal Archaeological Sites in Eastern Tasmania; A Cultural Resource Management Statement* Occasional Paper No 31 Department of Parks, Wildlife and Heritage, Tasmania

Kee S. 1991 *Aboriginal Archaeological Sites in North East Tasmania* Occasional Paper No 28 Department of Parks, Wildlife and Heritage, Tasmania

