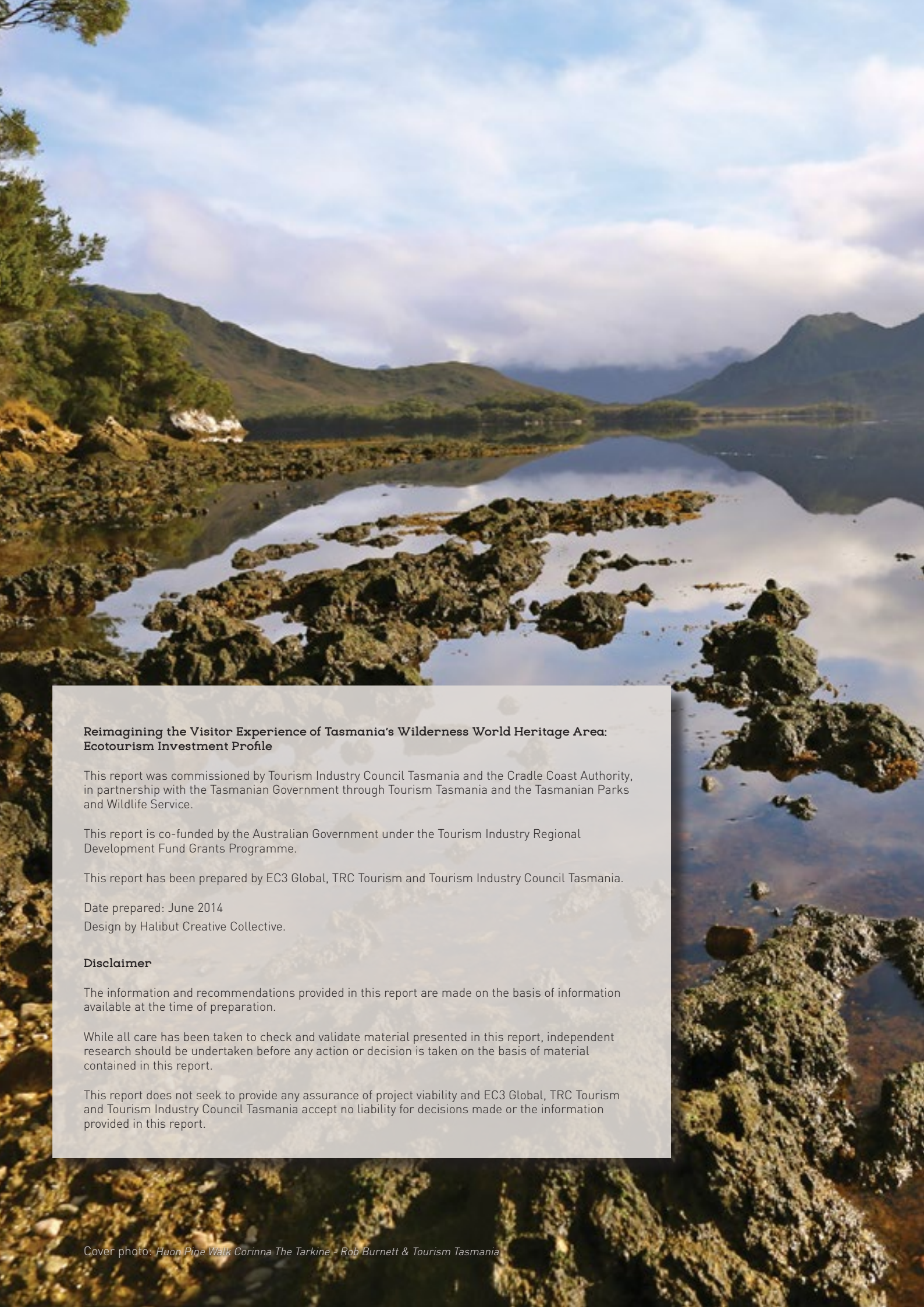


Reimagining the Visitor Experience of Tasmania's Wilderness World Heritage Area

Ecotourism Investment Profile





Reimagining the Visitor Experience of Tasmania's Wilderness World Heritage Area: Ecotourism Investment Profile

This report was commissioned by Tourism Industry Council Tasmania and the Cradle Coast Authority, in partnership with the Tasmanian Government through Tourism Tasmania and the Tasmanian Parks and Wildlife Service.

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This report has been prepared by EC3 Global, TRC Tourism and Tourism Industry Council Tasmania.

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Disclaimer

The information and recommendations provided in this report are made on the basis of information available at the time of preparation.

While all care has been taken to check and validate material presented in this report, independent research should be undertaken before any action or decision is taken on the basis of material contained in this report.

This report does not seek to provide any assurance of project viability and EC3 Global, TRC Tourism and Tourism Industry Council Tasmania accept no liability for decisions made or the information provided in this report.



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Background

A Unique Tourism Opportunity

2013 marked the 30th anniversary of the UNESCO listing of the Tasmanian Wilderness World Heritage Area (TWWHA). The tourism industry recognises the importance of the World Heritage Area in developing the brand of, and visitation to the State of Tasmania, but also recognises the need to create a new vision to guide the visitor experiences offered within the TWWHA through the next 30 years – a unique tourism opportunity.

Over the last 30 years, the TWWHA has spawned a vibrant tourism industry. Iconic destinations including Cradle Mountain, the Gordon River, and Lake St Clair, have brought millions of visitors to Tasmania, underpinning the state's brand as a global destination for nature-based tourism.

While the importance of the World Heritage Area is without question, its pulling power for domestic and international visitors has waned, evidenced through the decline in visitation to the West Coast region in particular. The Tasmanian tourism industry recognises that while the wilderness is seen as a core attraction, the region has not seen the levels of innovation, or created the new attractions or experiences needed to maintain a competitive advantage over the last decade.

The *Reimagining the Visitor Experience of Tasmania's Wilderness World Heritage Area* project is led by Tourism Industry Council Tasmania and the Cradle Coast Authority, and has been initiated in partnership and with the full support of the Tasmanian Government, through Tourism Tasmania and the Tasmanian Parks and Wildlife Service. The project has been co-funded by the Australian Government under the Tourism Industry Regional Development Fund Grants Programme.



Tourism Industry Council Tasmania (TICT) is the peak body that represents and acts for the Tasmanian tourism industry. The Council is a not-for-profit organisation that promotes the value of tourism and advocates policy on behalf of the industry. TICT vision is for a unified tourism industry, working with Government and the community to develop: a world class tourism industry, that delivers quality products, services and experiences for our customers; sustainable growth in profitability for the industry; and a buoyant economy for Tasmania.

Cradle Coast Authority is a joint authority created by the nine councils of North West Tasmania to facilitate the sustainable development of the region, resolve regional issues and coordinate regional-scale activity. The Authority is engaged in a wide range of regional initiatives including tourism; natural resource management; education, training and workforce development; industry development; local government services, and facilitating the Regional Planning Initiative and Land Use Strategy. The Authority has a dedicated team of tourism personnel, guided by the Cradle Coast Tourism Executive, acting as the Regional Tourism Organisation for the Cradle Coast.

Tasmania Parks and Wildlife Service's mission is to create and maintain a representative and world-renowned reserve system; conserving the State's natural and cultural heritage while providing for sustainable use and economic opportunities for the Tasmanian community. Tasmania Parks and Wildlife Service is the land manager and regulator for tourism in Tasmania's National Parks and reserves, as well as a significant provider of visitor information, infrastructure and tourism experiences.

Tourism Tasmania is a statutory authority of the Tasmanian Government, whose role is to maximise the contribution of tourism to Tasmania's economic growth through effective, research-led destination marketing. Tourism Tasmania's goals are to drive demand for Tasmania, and enhance industry's competitive position with market-leading research and sound policy advice.



Reimagining the Visitor Experience of the TWWHA

The *Reimagining the Visitor Experience of Tasmania's Wilderness World Heritage Area* project aims to develop a new vision to guide the development of visitor experiences in and around the TWWHA for the next thirty years. The Reimagining project's key objectives are to identify ideas and concepts for sustainable, low-impact and innovative tourism experiences that could be developed in the TWWHA; and provide government and industry leadership to progress this vision and key ideas and concepts identified.

Stage 1: Concept Design Group

Stage 1 of the Reimagining project brought together a group of tourism operators, developers, investors and consultants, known for their creative thinking, from Tasmania, interstate, and overseas. Each member of the 'Concept Design Group' volunteered their time and significant expertise to spend a week in the TWWHA during November 2013, to participate in a 'blue sky' exercise and 'reimagine' the visitor experience of the TWWHA.

The members of the Concept Design Group were Lisa Choegyal, Paul Cave, Grant Hunt, Darryl Wilson, Rob Sherrard, Wayne Kirkpatrick, David Bamford, Mark Olsen, Simon Currant, Robert Pennicott, Peter Mooney, and Mark Wilsdon.

The Concept Design Group travelled to the Southwest, the Wild Rivers, Cradle Mountain and Lake St Clair, the Walls of Jerusalem, and the Tarkine over five days; viewing areas of the TWWHA from the air, on water, and on foot. The group were asked to view the TWWHA with fresh eyes, and no constraints, and to imagine – to contribute their visions and concepts for new products, and new ways for visitors to experience the wilderness.

The Concept Design Group provided a diverse range of ideas for new tourism activities and experiences across the TWWHA, and constructive criticism of the current visitor experience of some area of the TWWHA; they developed a collective vision to deliver the most contemporary wilderness experience through the TWWHA, and identified policy and planning changes that would be needed to encourage and enable implementation of this vision.



Stage 2: Project Partners Reference Group

In early 2014, representatives from each of the project funding partners – Tourism Industry Council Tasmania, Cradle Coast Authority, Tasmanian Parks and Wildlife Service, and Tourism Tasmania – met to review the vision, concepts, and enablers identified by the Concept Design group, and to determine priority projects and actions to progress the shared vision.

Stage 3: Ecotourism Investment Profile

This Ecotourism Investment Profile is the conclusion of the *Reimagining the Visitor Experience of Tasmania's Wilderness World Heritage Area* project. This report aims to build a new vision for the type of sustainable, low-impact and innovative tourism activity that could be established within or in conjunction with the TWWHA to attract whole new generations of visitors over the next 30 years. This could involve walking, touring, interpreting, camping, flying, cruising, and hopefully, some things completely new, different, and at the cutting edge for the visitor experience.

In the following sections, this Ecotourism Investment Profile will firstly provide a brief introduction to the Tasmanian Wilderness World Heritage Area. This report will then look at the challenge of declining visitation to protected areas and in particular, the West Coast of Tasmania, before canvassing the current market trends in Tasmanian tourism and nature-based tourism more generally to identify the key potential growth markets for the TWWHA.

This Ecotourism Investment Profile will then turn to establishing the tourism industry's vision and goals for the Tasmanian Wilderness World Heritage Area. This section will explore six projects identified by the Concept Design Group and Project Partners Reference Group as priorities for delivering on the vision, providing new and/or enhanced visitor experiences, and encouraging or enabling other new tourism developments to emerge.

Finally, the Ecotourism Investment Profile will recommend broad strategic directions for 'where to from here'. Appendix 1 provide more detailed strategic actions and enablers for delivering on the vision and goals; while Appendix 2 lists a diverse range of opportunities for each precinct of the TWWHA considered during this project.



Tasmania's Wilderness World Heritage Area

Tasmania's Wilderness World Heritage Area (TWWHA) covers 1.4 million hectares – almost a fifth of the total area of Tasmania (see Figures 1 and 2).

The TWWHA protects one of the largest temperate rainforests remaining in the southern hemisphere.

The area is well-known for its diverse and beautiful landscapes, unique glaciated scenery, pristine coastlines, ancient forests and an extraordinary range of native plants and animals, some of which are rare and endangered.

Some of the cultural values comprise outstanding Aboriginal artefacts resulting from 40,000 years of living within the rugged landscape. These include stone and bone toolkits used for hunting and processing prey, to limestone cave systems containing rock art that dates back to the last Ice Age.

The region is also home to the historic convict settlement at Sarah Island in Macquarie Harbour, centuries of mining and pining activity, remarkable hydro-engineering and the focus of some of Australia's greatest environmental conservation campaigns.



Figure 1: Tasmanian World Heritage Wilderness Area
Source: Tasmanian Parks and Wildlife (2008)



Iconic destinations such as Cradle Mountain, Lake St Clair, Strahan and Bathurst Harbour-Melaleuca have become the key attractions for visitors to experience the enduring wonders of the Tasmanian Wilderness.

These destinations are accessible by multi-modal transport, along with a wide range of facilities and services that cater for different visitor needs.

The Tarkine

The Tarkine region of North-West Tasmania incorporates many of the same cultural and environmental features as the TWWHA. Despite attempts to secure increased status for the Tarkine, it sits outside the prescribed boundary of the TWWHA and is not a National Park; sections of the Tarkine are state reserve or conservation areas, and a long strip of the coastline is National Heritage listed.

Nevertheless, the Tarkine is a region with exceptional natural and cultural values, significant tourism potential, and contiguous to the official TWWHA. For the purposes of this project, the Tarkine has been considered in conjunction with the TWWHA and an important part of the future visitor experience of Tasmania's Wilderness areas.



Figure 2: Tasmanian World Heritage Wilderness Area – Boundary Plan

Source: Commonwealth of Australia, World Heritage Areas (2013)



World Heritage Listing

The Tasmanian Wilderness World Heritage Area was inscribed on the World Heritage List in 1982, with boundary extensions officiated in 1989, 2010, 2012 and June 2013.

The United Nations Educational, Scientific and Cultural Organisation (UNESCO) lists sites as World Heritage, in the interests of the international community, when they meet the condition of “outstanding universal value” against one of ten World Heritage criteria. The Tasmanian Wilderness World Heritage Area is one of only two sites in the world that meets not one, but seven criteria.

The TWWHA is listed for its outstanding universal value in the following criteria:

- Outstanding examples representing the major stages of the earth’s evolutionary history
- Outstanding examples representing significant ongoing geological processes, biological evolution and man’s interaction with his natural environment
- Contains superlative natural phenomena, formations or features, for instance outstanding examples of the most important ecosystems, areas of exceptional natural beauty of exceptional combinations of natural and cultural elements
- Contain the most important and significant habitats where threatened species of plants and animals of outstanding universal value form the point of view of science and conservation still survive
- Bear a unique or at least exceptional testimony to a civilisation which has disappeared
- An outstanding example of a traditional human settlement which is representative of a culture which has become vulnerable under the impact of irreversible change
- Directly or tangibly associated with events or with ideas or beliefs of outstanding universal significance.

TWWHA Management Plan

The Tasmanian Wilderness World Heritage Area is managed under a partnership agreement between the Australian and Tasmanian Governments. Day to day management of the area is the responsibility of the Tasmanian Parks and Wildlife Service, in accord with the Tasmanian Wilderness World Heritage Area Management Plan, 1999.

The Management Plan is currently under full review in order to develop a more contemporary management plan for the TWWHA, and to cover the new areas added to the TWWHA in recent year’s extensions. It is expected that the draft for the new Management Plan will be completed in 2014¹.

The Reimagining project process and this Ecotourism Profile aim to inform Government policy making on tourism in natural areas and contribute to the public consultation process around the new TWWHA Management Plan.

The new Tasmanian Liberal Government has also announced an open Expression of Interest process, for tourism operators to come forward with EOIs to develop new visitor experiences and attractions in Tasmania’s Parks and reserves, including the TWWHA.² The new Government has also stated a goal to grow the tourism industry to 1.5 million annual visitors by 2020, and create 8,000 new jobs in tourism.³

The Reimagining project has provided a major opportunity to establish a new vision for growing and enhancing visitor experiences for one of the state’s most unique assets. This Ecotourism Investment Profile aims to guide and facilitate growth in ecotourism through a strategic approach, following consultation with key stakeholders, investors, industry, and regional tourism stakeholders.

1. Department of Primary Industries, Parks, Water and Environment 2014, *Tasmanian Wilderness World Heritage Area Management Plan*, Tasmanian Government, Hobart, as at June 2014, www.dpipwe.tas.gov.au/conservation/tasmanian-wilderness-world-heritage-area/new-tasmanian-wilderness-world-heritage-area-management-plan.

2. Tasmanian Liberals 2014, *Unlocking the potential in our Parks*, Tasmanian Liberals’ policy, accessed June 2014 www.tas.liberal.org.au/sites/default/files/policy/Unlocking%20the%20potential%20in%20our%20Parks.pdf

3. Tasmanian Liberals 2014, *Growing our Tourism Industry*, Tasmanian Liberals’ policy, accessed June 2014 www.tas.liberal.org.au/sites/default/files/policy/Growing%20our%20Tourism%20Industry.pdf

Understanding the Challenge

In order to develop a strategic approach to enhancing the visitor experience of the TWWHA, and developing new and innovative tourism products, it is first necessary to understand the major market trends and the challenges currently faced by tourism operators working in and around Tasmania's wilderness destinations.

Global Shifts

Across the developed world, visitation to National Parks and protected areas is either flat or declining; while in emerging destinations such as China and India, it is growing at or above the rate of other destinations (see Figure 3 below).

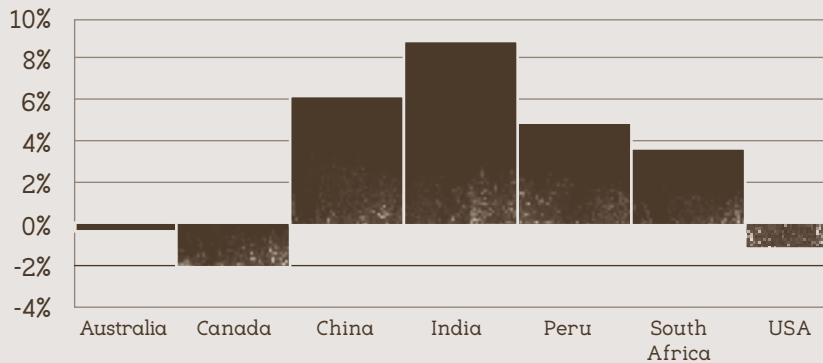


Figure 3: Median change in per capita visits to Protected Areas 2009-2013

Source: Tourism Research Australia Tourism Profiles

Trends in Nature-Based Tourism

While visitation to protected areas has been declining in developed countries, nature-based tourism is growing across the globe. Increasingly, the trends are towards both adventure and comfort, witnessing a boom of investment in the following:

- 'Glamping' and luxury tents in spectacular locations
- Reuse of industrial and heritage sites for modern luxury
- Ziplines, via ferrata, high ropes/flying fox and tubing
- Overnight mountain-biking, hiking and skiing trails
- Heli-touring, jet boating and other rapid transport
- Tubing

Domestically, Australian outdoor visitors expect much richer experiences in nature, seeking to reconnect with the environment on a personal level. Many are seeking more active and adventurous experiences – activities which are showing greater growth in Australia compared with the more traditional protected area activities of walking and nature experiences.

There has been a strong increase in adventure activities across Australia since 2008, with the most popular being mountain-biking (21% growth). In contrast, walking has grown by only 3% since 2008. Other growth areas in Australia include:

- Boutique luxury lodges and safari camps in remote locations
- Overnight accommodated (including luxury) walks
- Ziplines and high ropes
- Rail trails and mountain-bike trails
- Food and gourmet tourism in natural/protected areas
- Participation sports events

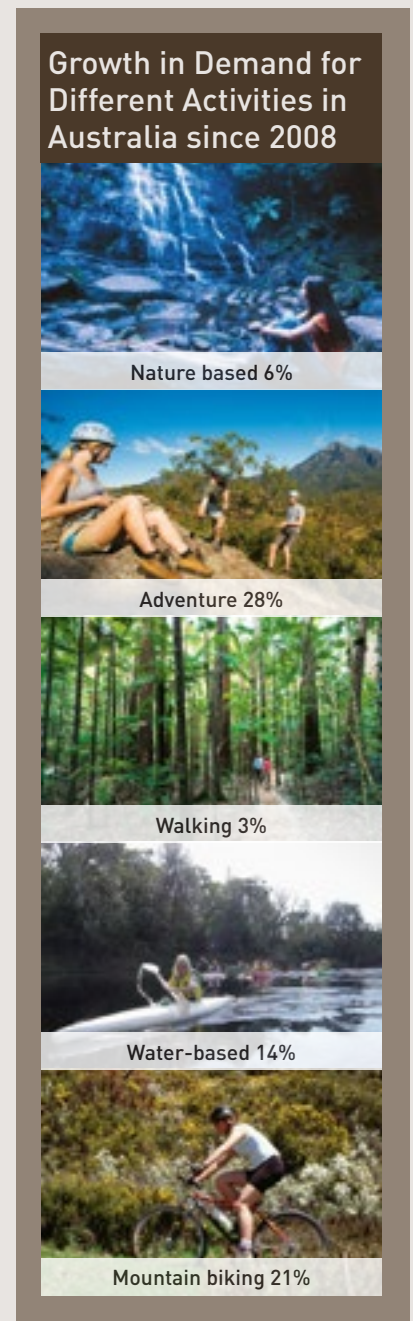


Figure 4: Growth in Demand for Different Activities in Australia since 2008

Source: Tourism Research Australia, National and International Visitor Survey



Tasmanian Market Shifts and Opportunities

Shorter Stays and a Trend Towards Hobart

In the Year Ending (YE) December 2013, Tasmania received over 1 million visitors (not including cruise ship arrivals), representing a 14% increase since the previous year and a new record for the Tasmanian tourism industry.⁴

Tasmania receives a small percentage of international visitors to Australia, with 159,300 international visitors YE December 2013. Tasmania has been growing at just below the national average, with just a 4% increase in international visitation from 2009 to 2013; however, Tasmania is seeing rapid growth in key Asian markets, and the Year Ending December 2013 was up a significant 14% on the previous year.⁵

Significantly for more remote wilderness areas, while total domestic visitor nights have increased by 8% since 2009 due to higher total visitor numbers, the average length of stay for domestic visitors has declined from 8.5 nights in 2009 to 7.5 nights in 2013. For international visitors, total nights have increased by 11%, and the average length of stay has remained relatively steady around 20 nights. Across Australia, the trend since the Global Financial Crisis in 2008 has seen a flat touring holiday market, which is the primary domestic market for regional Tasmania.

An ongoing challenge for Tasmania's regional tourism industry is the disproportionate contribution of visitors to Hobart to total visitor numbers. In YE March 2014, Hobart City accounted for 63% of total nights spent in the state of Tasmania, and has experienced higher, sustained, growth in visitor numbers than all other destinations in recent years.

Repeat Visitation

Overall, Tasmania's tourism industry relies heavily on repeat visitation and it is expected to be a major driver for future growth in visitor numbers.

Tasmanian Visitor Survey data shows that of all annual visitors YE March 2011-14, 70% had been to Tasmania before, and for 67% of that 70%, this visit came within 4 years since their previous visit to the state.⁶ These figures highlight the need for new experiences in the Tasmanian tourism market – to keep these visitors engaged, returning again, and sharing positive stories by word of mouth.

West Coast Wilderness

As a developed-nation destination, reliant on its natural assets for visitor appeal, Tasmania could expect to be seriously impacted by the global shift away from protected areas. However, Tasmania maintains the highest rates of domestic visitation to reserved lands; while major investments in luxury and cultural tourism products, and a shift in the marketing of Tasmania as a destination, have seen the state's tourism industry rebound.

Nevertheless, the West Coast's tourism industry has not experienced the same growth. Although the TWWHA boundaries now stretch far to the south and into the north of Tasmania, the West Coast, and in particular Strahan, have been historically positioned as the heart of Tasmania's wilderness visitor experience. The West Coast, however, has not had a significant level of investment in visitor-generating tourism products or attractions in the last decade, compared to other Tasmanian destinations, leaving the region increasingly out of step with what visitors expect of a primary gateway into Australia's most valuable World Heritage area (see Figure 4).

Looking into visitor motivators and satisfaction, Tourism Research Australia and Tourism Tasmania's 2014 research found that the West Coast was seen as "better suited to 'intrepid travellers' who didn't mind 'roughing it'", and there was limited awareness of attractions in the region including Strahan, Macquarie Harbour and the Gordon River.⁷

4. Tourism Tasmania 2014, *Tasmanian Tourism Snapshot: Year ending December 2013*, Tasmanian Government, Hobart, accessed June 2014, http://www.tourismtasmania.com.au/___data/assets/pdf_file/0004/20983/Tasmanian_Tourism_Snapshot_-_December_2013.pdf.

5. Tourism Tasmania 2009-2013, *Tasmanian Visitor Survey – TVS Analyser*, Tasmanian Government, Hobart, accessed June 2014, <http://www.tvsanalyser.com.au/>.

6. Tourism Tasmania 2009-2013, *Tasmanian Visitor Survey*

7. Tourism Research Australia 2014, *Motivations and Satisfaction of Visitors to Tasmania*, Commonwealth of Australia, Canberra.

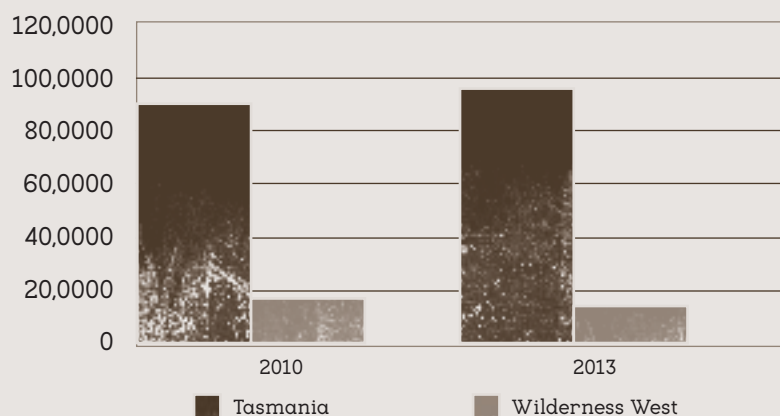


Figure 5: Tasmania and the West Coast: 5 Year Visitor Trend (Year Ending June)

Source: Tourism Tasmania, Tasmanian Visitor Survey 2009 & 2013

Market Snapshot

Tasmania:

- Domestic visitors are primarily from Victoria (46%), New South Wales (24%), and Queensland (14%)⁸
- The top three international source markets are from 'Other Europe', China and the UK (Table 1)
- Two of these major markets, 'Other Europe' and the UK, have seen declining numbers travelling to Tasmania in the last five years.
- The Chinese market, while still accounting for a relatively small proportion of visitors to Tasmania, is rapidly growing (up 17% in the year ending June 2013)⁹
- The average spend per day is \$186 for domestic and \$81 for international visitors

West Coast:

- Interstate visitors are primarily from Victoria (19%), NSW (12%) and QLD (7%)
- The top three international source markets are 'Other Europe', New Zealand and the USA
- Two of these major markets, 'Other Europe' and New Zealand, have seen declining numbers travelling to Tasmania in the last five years.

Country of Residence	Visitors YE June 2013	Five Year Change 2009-13
1. Other Europe	7,577	-21%
2. New Zealand	6,076	-1%
3. USA	5,270	16%
4. United Kingdom	4,350	-55%
5. Germany	2,886	-32%
Total	38,046	-19%

Table 1: Top Five Overseas Markets for Tasmania since 2009 (Year Ending June)

Source: Tourism Research Australia, National and International Visitor Survey

8. Tourism Tasmania 2009-2013, Tasmanian Visitor Survey

9. Tourism Tasmania 2009-2013, Tasmanian Visitor Survey

Through this Ecotourism Investment Profile, the Reimagining project aims to showcase the strengths of this destination, identify new growth markets and encourage a high level of new and repeat visitation by encouraging innovative investment in and near the TWWHA – to reverse the decline in the West Coast visitor market, grow Tasmania's ecotourism industry, and provide meaningful visitor experiences of these precious places.



Wildside MTB 2010 - Rick Eaves & Tourism Tasmania

Growth Markets for the TWWHA

Tasmania's wilderness experiences have the strongest emotional associations, the strongest appeal and, for its target markets, are the most potent motivators to shift travel intention to Tasmania.¹⁰

Tourism Tasmania research on the motivators for travel to Tasmania shows that wilderness and heritage are continually strong motivators. Recognising the high level of repeat visitation to the state, the West Coast, and the TWWHA more broadly, faces the challenge to offer something new in order to tap into the ready market for wilderness and heritage.

Life Long Learners

Tourism Tasmania's domestic tourism target markets are known as Life Long Learners.

Life Long Learners have a common interest in exploring and learning more about themselves and the world in which they live. This group is made up of couples aged 40+ seeking a touring experience, and couples aged between 25-39 wanting a short break.

By nature, they have the propensity to keep learning and their reasons for taking a holiday are either to discover and understand new people and places, go exploring, or to escape, and spend time together, and create new memories.

Experience Seekers

Tourism Australia's international tourism target markets are known as Experience Seekers.

Experience Seekers (who come from a variety of age groups and socio-economic backgrounds) are interested in gaining 'authentic' experiences through immersion in the character of a destination; gaining new knowledge and understanding of people and places; personal development; and engaging in activities which provide a contrast to their everyday life.

They are discriminating travelers who frequently seek products that enable them to have immersive experiences in areas where they may be inexperienced – such as 'soft' adventure activities.

Growth Markets

Future tourism development in the TWWHA should aim to 'reimagine' the current visitor experience in order to regain the share of the markets that have previously been strong for the regions, as well as looking to attract the following new market segments:

- Adventure travellers
- High Net Worth individuals
- Off-season travellers (particularly the walking market)
- Asian markets
- Younger couples
- Younger families

10. Tourism Tasmania 2010, *Appeal Triggers and Motivations for Tourism in Tasmania*, Tasmanian Government, Hobart.



Vision, Goals, and Priority Projects



Delivering a New Direction

The Vision

Through engagement with the tourism industry and consideration of consumers' changing wants and needs, a broad vision for tourism in the Tasmanian Wilderness World Heritage Area has been identified:

“To deliver the most contemporary wilderness World Heritage Area experience offering shared, life changing, moments.”

The focus for the future of the TWWHA is on growing the value of the place at a low volume, and aims at attracting visitors who are willing to pay for high value experiences.

The Goals

Seven goals have been identified for tourism operators to engage with, assisting to reposition the TWWHA and deliver a reimagined visitor experience:

Making Our Customers Heroes

Responding to customers' needs, wants, expectations and desires are essential in forming an appealing holiday experience that caters to the requests of the clientele.

Providing Personal, Hands-on Experiences

Attracting visitors and promoting the environmental values and uniqueness of the region, from hands-on wildlife experiences and guided walks to overnight mountain bike trails and volunteer/learning experiences.

Embracing the Tourism Conservation Partnership

Positioning the TWWHA as a premier conservation destination, providing interpretation and story tellers, and delivering once-in-a-lifetime moments to facilitate a viable and sustainable tourism industry in the region.



Bringing the Aboriginal Stories and Heritage to Life

Actively engaging and conversing with Aboriginal people, so that visitors can learn to better appreciate their connection to country and why this area was listed as World Heritage for its cultural as well as natural values.

Giving Experience Providers Confidence in New Opportunities

Opening access to new areas of the TWWHA through zoning changes, and ensuring the security of tenure for tourism operators; shifting the messaging to increase awareness and certainty of eco-tourism in the region, and improving air access to encourage ideas for new experiences and opportunities.

Delivering World's Best Practice that is Measurable

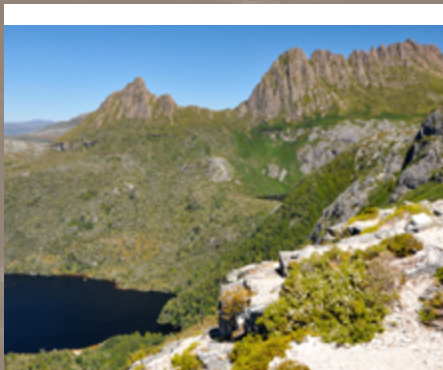
Ensuring a reputation for quality experiences and environmental sustainability against a range of globally relevant performance indicators; such as mandatory accreditation for commercial operations in the TWWHA, sustainable building design standards for new infrastructure developments, and stronger lease conditions.

Embracing New Markets and Communication Channels

Building a destination brand for the TWWHA, based on diverse natural and protected environments, and inspirational human stories; targeting niche markets and special interest groups with story-telling linked to a brand strategy and events-driven activities.

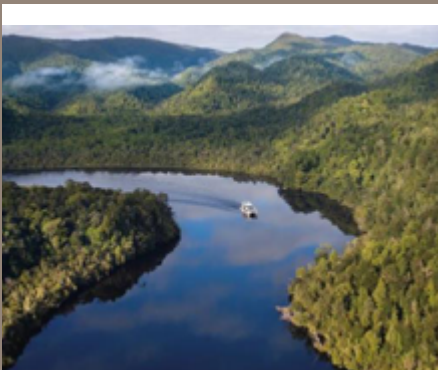
Priority Projects

To achieve the industry vision for the TWWHA, funding and innovation on behalf of the community, industry and land managers will be required. More detailed actions and enablers for delivering on the seven Goals and achieving the Vision are provided in Appendices 1 and 2 at the end of this report. Each of these actions and enablers will be important; however, the tourism industry believes that the success of bringing the vision into reality require immediate progress on six priority projects.



THE CRADLE MOUNTAIN VISITOR EXPERIENCE

Revitalising the Cradle Mountain experience by recognising the trend to shorter breaks; the growth in the overnight walking and mountain-biking sectors; the need for new visitor facilities, and a complete visitor experience at Cradle Mountain and Dove Lake.



THE GORDON RIVER VISITOR EXPERIENCE

Providing a policy framework that encourages innovation in presentation, interpretation and conservation of the Gordon River; lifting the standard and variety of experiences delivered in the spiritual home of the Australian and international political conservation movement.



THE WORLD'S OLDEST LIVING TREE

The Huon Pine at Mt Read is Tasmania's oldest living resident, providing one of the most amazing stories from the Tasmanian Wilderness, and an opportunity to seek industry ideas and investment to deliver a sensitive and sustainable visitor experience around the world's oldest living tree.



WILDERNESS ACCOMMODATION

Identifying precincts (not specific locations) suited to eco-lodge accommodation developments; and seeking expressions of interest from the private sector, with clear guidelines and an expectation of best practice ecologically sustainable development to set a new national benchmark in quality.



AIR ACCESS

Increasing air access to the TWWHA, in particular to the Western Wilderness, to cater to visitors with a shorter length of stay, and improving the accessibility of Melaleuca-Bathurst Harbour.



STORY TELLING

Hearing the stories of the TWWHA could be the primary motivators for travel to Tasmania and its wilderness areas. Indigenous, colonial, natural, conservation or modern; well-told stories of the TWWHA combined with contemporary marketing strategies provide many opportunities to share and embrace the TWWHA.



The six priority projects for the TWWHA are 'reimagining' and revitalising the visitor experiences of Cradle Mountain and the Gordon River; developing an experience around 'accessing' the World's Oldest Living Tree; developing quality wilderness accommodation; improving air access to the TWWHA, and lifting the stories of the TWWHA and the telling of those stories to a new level.

No single priority project is necessarily more strategically important than the other, and the most promising outcomes for the visitor experience of the Tasmanian Wilderness will come from the simultaneous implementation of each of these projects; each strengthening and supporting the viability and progress of the other, and stimulating further investment in other actions, enablers, and new tourism experiences across the TWWHA.

This report will now profile each project in turn, outlining the market needs, key potential benefits, and the policy and planning implications for their implementation. The first three projects listed deal with icon destinations for the TWWHA and the potential to deliver contemporary, world class experiences for visitors; these projects also take the opportunity to present what a 'reimagined' visitor experience could look like at these places. The next three priority projects then look across the TWWHA and consider concepts that would both stimulate and support more dispersed visitor growth.



The Cradle Mountain Visitor Experience

Background

World Heritage listed Cradle Mountain-Lake St Clair National Park is one of Tasmania's premier wilderness regions and one of Australia's iconic tourism destinations. Cradle Mountain is a primary gateway for visitors to the TWWHA, with the Cradle Valley precinct accessed by approximately 160,000 visitors per annum¹¹.

Cradle Mountain features a variety of environments, including rainforest, alpine heathlands, button grass, and deciduous beach, mountains and streams, lakes, pine forest and diverse wildlife. Key sightseeing locations within the Cradle Valley precinct are the dramatic vista of Cradle Mountain across Dove Lake, and Weindorfer's Chalet – a rustic alpine chalet that was once home to the Park's founding father Gustav Weindorfer and his guests.

Cradle Mountain and its surrounds are internationally recognised as a walking destination, as well as being a significant site for other forms of nature-based tourism. The Cradle Valley is the beginning of the Overland Track, a six-day walk traversing 65 kilometres to Lake St Clair through the heart of the TWWHA. A number of short walks and day walks are also available in the Cradle Valley.

The Cradle Valley visitor entry node is approximately 2.5 hours from Launceston by car, and around 4.5 hours from Hobart. Outside the National Park, there is a Visitor Centre, shop and café at the 'transit terminal', while just inside the Park entrance there is a Rangers Station and Interpretation Centre. The Parks and Wildlife Service manages simple cabin accommodation within the park, and a number of private lodge and cabin style accommodation providers operate along the Park boundary.

Market Needs

Cradle Mountain is a primary gateway to the Tasmanian Wilderness World Heritage Area and more specifically, to one of Australia's most famous national parks. The whole precinct needs to offer a world class visitor experience, including a range of new activities, if it is to meet contemporary market expectations and continue to attract increasing numbers of visitors, including repeat visitors.

Vision

Cradle Mountain delivers the most contemporary wilderness World Heritage Area experience offering shared, life changing, moments.

Goals

- Make our customers heroes
- Provide personal, hands-on experiences
- Embrace the Tourism Conservation partnership
- Bring the Aboriginal stories and heritage to life
- Give experience providers confidence in new opportunities
- Deliver world's best practice that is measurable
- Embrace new markets and communication channels

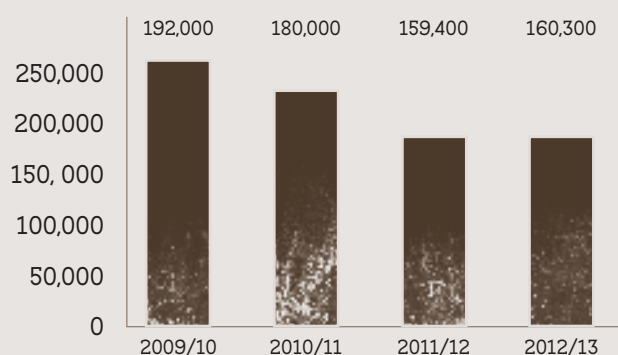


Figure 6: Total Visitors – Cradle Mountain/Cradle Valley 2009-10 to 2012-13
Source: Tourism Tasmania, Tasmanian Visitor Survey 2009-2013, 'Total Tasmanian Attractions Visited or Stayed Overnight'

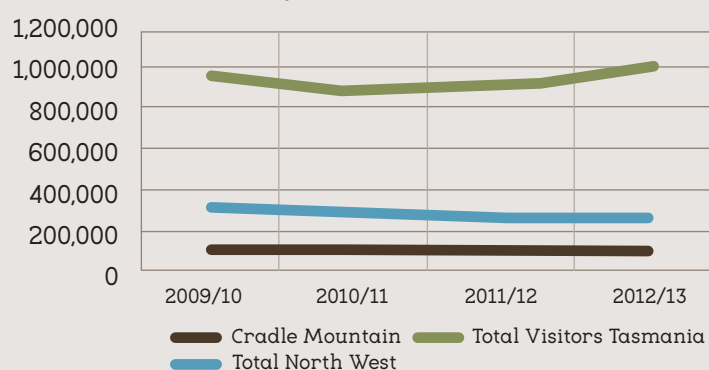


Figure 7: Total Overnight Visitors – Cradle Mountain and Region

Source: Tourism Tasmania, Tasmanian Visitor Survey 2009-2013, 'Total Tasmanian Attractions Visitor or Stayed Overnight'

Over the last ten years the Tasmanian visitor economy has undergone structural change due to a number of factors, including the introduction of low cost airlines, which has impacted the traditional touring market. There has been a decrease in the number of overnight visitors to Cradle Mountain and the number of visitors on the Cradle Country touring route, despite growth in state visitor numbers over the same period (see Figures 4 and 5). This changing dynamic, together with a shift in visitor needs and preferences suggest that the Cradle Mountain precinct will require a fundamental revitalisation and shift in focus to be competitive with other destinations.

Cradle Mountain needs to strengthen its role as a gateway to the TWWHA with new experiences catering to a range of different markets. The area needs greater clarity and focus on its competitive advantages for each priority visitor segment, and align this to a shift market and communications, targeting a range of visitors and linked experiences.

Cradle Mountain Visitor Experience: Precinct Revitalisation

Through the Reimagining project, it was identified that Cradle Mountain and the surrounding region would benefit significantly from a 'precinct revitalisation': reimagining and enhancing the visitor experience of Cradle Mountain by providing a quality sense of arrival into the wilderness; amenities and services appropriate to the area's 'outstanding universal value' and sufficient for expected visitor numbers; and new experiences to engage visitors with one of the nation's most important natural assets.

This precinct revitalisation will require a mix of public and private investment, and a master plan will be required to provide a framework and guide investments to actively support visitor growth.

A number of options have been identified by the tourism industry (for detailed planning in the master plan) as priorities to improve the Cradle Mountain visitor experience and revitalize the Cradle Mountain precinct. These options are:

- Building a new World Heritage Centre
- The revitalisation of the Dove Lake visitor precinct (within the Cradle Mountain precinct)
- Creating new opportunities for cycling, and
- Creating a new overnight 'Taste of the Overland' experience

Case Study: South West New Zealand World Heritage Area, Haast Visitor Centre



Established in 1989, the Haast Visitor Centre looks after around 100,000 visitors per annum. The centre provides recreation and tourism information, interpretation, retail and booking services (mix of no commission and 10%) for accommodation and activities. The Haast Visitor Centre has strong links to the local

Haast tourism operators and other visitor centres on the West Coast of the south island New Zealand.

The Haast Visitor Centre delivers and maintains strong and relevant messages about the South West World Heritage Area (WHA). The centre is in a key location at the southern entry point to the WHA, with striking building landscaping design.

Case Study: South Westland World Heritage Area New Zealand - Franz Josef Glacier Visitor Centre



The Franz Josef Glacier Visitor Centre caters for around 500,000 - 800,000 visitors per annum and serves as the Park's headquarters. The Visitor Centre offers services such as interpretation, summer visitor activities (guided walks and talks), recreation and tourism information, and retail. The visitor centre offers online booking

services linked to regional tourism operators and is one of the only Department of Conservation visitor centres in New Zealand that is also an "I SITE" and officially branded Visitor Information Centre - with 86 other centres in the country.

The centre is in a key location at one of the busiest visitor destinations on the West Coast of New Zealand, and is well integrated with the local visitor industry. It is also key to providing visitor information and visitor safety at the glacier, with an intensive daily regime in place to assess risk from the moving glacier.

A New World Heritage Centre

Consistent with the Cradle Valley Tourism Development Plan 2003 a new Cradle Mountain World Heritage Centre is a critical component in creating a world-class visitor experience of the Tasmanian wilderness.

It was estimated in the Cradle Valley Tourism Development Plan that investment in the Cradle Mountain precinct could increase visitor numbers by approximately 40,000 per annum, which in turn would create an additional \$14.4 million in visitor expenditure and create around 200 jobs, and have a strong, positive impact on the wider regional economy of the Cradle Coast.

The Cradle Valley Tourism Development Plan recommended investment in a Cradle Mountain Park Centre as a critical component in creating a world-class visitor experience. It planned that the Centre would consist of visitor reception and services; interpretation of the TWWHA's natural and cultural significance; and café facilities leased to the private sector; associated road works, car parking and walking trails.

While a new, more appropriate Visitor Centre, will play an important role, it must figure as only part of a wider precinct revitalisation in order to have a full effect. It needs to provide a sense of arrival and begin the process of immersing visitors into the precinct, one part in the whole impression and experience of Cradle Mountain. A new Visitor Centre should not be funded or developed in isolation to other priorities outlined for Cradle Mountain. The proposed Visitor Centre should also incorporate opportunities for greater private sector investment, acknowledging the current and long-term accommodation infrastructure needs for Cradle Valley.



However, development of a new, iconic Cradle Mountain World Heritage Centre and associated priorities would stimulate further investment by the private sector in new accommodation, attractions and experiences in the Cradle Valley.

The development of a new Cradle Mountain World Heritage Centre, in keeping with the identified vision and goals for the whole TWWHA, will assist in turning what is currently a badly degraded site into an attractive arrival point for visitors to Cradle Mountain-Lake St Clair National Park, and provide a contemporary and engaging introduction and interpretation of the TWWHA, replacing the underwhelming visitor infrastructure and experience of today.

Successful examples of Visitor Centres in New Zealand emphasise the need for, and potential of a new Visitor Information/World Heritage Centre at Cradle Mountain.

Revitalisation of Dove Lake Visitor Precinct

The Dove Lake precinct needs revitalisation to provide an exceptional 'World Heritage' experience for first time and returning visitors in Tasmania's Wilderness World Heritage Area.

Currently, a private operator runs a shuttle bus service, on behalf of the Parks and Wildlife Service, to reduce traffic in the Park; transferring visitors between the 'transit terminal' (Visitor Centre, carpark and airstrip) and Dove Lake, stopping at the Ranger/ Interpretation Station, Snake Hill, Ronny Creek and Waldheim. Visitors can also self-drive and park their vehicles above the Dove Lake foreshore. Attached to the carpark are basic toilet facilities. The short (less than two hours), duckboard Dove Lake Loop Track, and viewing/photography of Cradle Mountain and the Lake from the carpark and foreshore are the most popular ways to experience the precinct.

Reimagining the Visitor Experience: Cradle Mountain

Passing through a massive archway, the visitor arrives at the Pencil Pine car park and heads into the Visitor Centre. The building impresses; architecturally striking, but still strongly in keeping with the natural environment and its surroundings.

Inside, the visitor finds a welcoming reception, and the information they need to make the most of their time here at Cradle Mountain.

The visitor prepares to join a group of eager travellers on the shuttle bus down into the park, leaving shortly. Waiting, the visitor takes a moment with the displays and interactive exhibits in the Centre; they begin to draw the visitor into the park and its stories, they can't wait to see more.

The 'bus' is better described as a glass coach; it has more windows than the visitor has ever seen on such a vehicle. It feels like you could just reach out and touch the trees and cliffs as they pass by on the way to Dove Lake.

The shuttle bus driver (and guide) is full of knowledge, an engaging raconteur. The journey is choreographed against the twists and turns of the winding road. The visitor is hooked, as they hear the tales of past explorers and see the landscape around them given new depth and meaning. As they come towards the top of a small hill, the guide tells the group to shut their eyes...

Case Study: Norwegian Wild Reindeer Centre



The Norwegian Wild Reindeer Centre Pavilion is located at Hjerkin on the outskirts of Dovrefjell National Park, overlooking the Snøhetta mountain massif. A 1.5km nature path brings visitors to this spectacular site, 1200 meters above sea level.

The 90m² building is open to the public and serves as an observation pavilion for the Wild Reindeer Foundation education programme.

A revitalisation of the Dove Lake precinct is proposed to include **relocating the car park and rehabilitating the area to a minimalist development state** (allowing for essential vehicle access and an extended shuttle bus service) in order to create a world class wilderness site for visitors.

To capitalise on the spectacular outlook over the lake and the mountains, a low-impact **viewing platform or lookout and walkway** is also proposed; suitable for large groups, and providing an appropriate trailhead for the iconic Dove Lake circuit walk.

A **viewing shelter**, environmentally sustainable, with exceptional design values, to ensure minimal visual impact on the restored wilderness landscape, and providing additional

basic facilities and services, is also an important component for revitalising the Dove Lake precinct.

To ensure a complete visitor experience at Cradle Mountain, the journey between the new World Heritage Centre and revitalised Dove Lake precinct should be a feature of the visitor experience and not just a means of transport. Through a tender process, the tourism industry can be encouraged to propose new and innovative ways to engage visitors on the Cradle Valley **shuttle bus service** – whether this through on-board interpretation and/or innovations in the vehicle itself – to create a memorable and unique experience at an appropriate standard for this special place.

‘Taste of the Overland’ Experience

Whilst there continues to be high demand for the Overland Track, international and national trends suggest that there is a growing demand for shorter walks, including one and two night soft adventure experiences. Given also the declining average length of stay for Tasmania’s major domestic visitor markets, there is an opportunity to develop an additional ‘iconic’ walk at Cradle Mountain – a two day-one night commercial, guided walking experience – providing a reason for repeat visitors to return, and for new markets to have a ‘taste’ of the Overland Track and get deeper into the wilderness around Cradle Valley.

A potential ‘taste of the Overland’ route would follow the start of the Overland Track, and then branch off to Lake Rodway with an overnight stop in a commercial hut/wilderness lodge in the vicinity of Lake Rodway (near Scott Kilvert Hut), before returning via the existing Lake Rodway Track. This would provide visitors with the opportunity to walk a section of the Overland Track, and climb both Cradle and Barn Bluff summits.

Cycling Opportunities

Cycling has seen significant recent growth within the nature based tourism sector, and cycling is increasingly recognised as an important attraction to bring contemporary markets into National Parks and wilderness areas.

Tasmania had 31,800 interstate cycling visitors in 2012-13 – up 36% from the previous year, following strong growth since 2009-10. Overnight cycling trips by Tasmanians travelling within the state also increased 29%.¹²

There are currently, however, no real opportunities for mountain bike riding or recreational cycling at Cradle Mountain. Therefore, it is recommended that new opportunities for cycling experiences are developed as part of the wider Cradle Mountain revitalisation, allowing new markets of visitors to enjoy, appreciate and engage with the wilderness from their bikes.

New cycling experiences could include the opportunity for visitors to cycle safely around the Park, using a dedicated cycle lane from the Park entrance through to Dove Lake. Any roadworks undertaken to support a more accessible shuttle bus service should include road widening and resurfacing to develop a marked cycle lane. Cycling visitors could then stop off at points of interest along the road, and return the same way out of the Park.

Cycling markets are not only growing, but they have typically longer stays and stay longer in smaller regions, and generally spend more than the average visitor. Making destinations cycle-friendly is a strong demand driver for attracting more of the cycling market. Promoting cycling as an enjoyable and sustainable way for visitors to experience Cradle Mountain will provide the necessary stimulus for private investment in commercial opportunities such as bike rentals and guided cycling tours.

New cycling opportunities at Cradle Mountain can also support and leverage off new and existing events, such as the popular Wild Side mountain biking challenge, to attract new markets to the TWWHA.

12. Tourism Tasmania, Tasmanian Visitor Survey 2009-2013

Case Study: Grand Teton shared pathway - Grand Teton National Park, USA



The Grand Teton multi-use pathway opened to the public in 2009, allowing vehicles and cyclists to safely share the road. The shared pathway is linked to key visitor nodes (visitor centres, walking tracks) and also to a number of mountain bike trails in the park and region.

The pathway is open seasonally after snow and has proved extremely popular with visitors and locals. A number of bike hire businesses have been established in the region as a result of the pathway in the park.

Reimagining the Visitor Experience: Cradle Mountain

...when the visitor opens their eyes, they are greeted by the recognisable shape of Cradle Mountain and Dove Lake. It's just like stepping into a spectacular picture frame, but of course the real thing is more stunning than any photograph.

The guide leads the group towards the foreshore and into a magnificent shelter hidden within the landscape. The visitor didn't even notice it was there until just before they stepped inside.

Equipped with a steaming mug of tea and a warm woollen blanket, the visitor settles into a seat and watches the clouds roll in over the mountain. A few raindrops hit the surface of the lake, the wind whips up the water and dashes against the shelter's glass. The visitor sits in quiet contemplation, completely calm.

A ranger joins them in the shelter and shares more stories of the area, answering visitors' questions about the past and the present, the people and the place. The visitor is amazed by the significance and complexity of their current surroundings, the unique wilderness – and its long human history.

The more adventurous members of the group venture away for walks, some shorter, some longer. Exploring the Myrtle forests and Alpine tarns, climbing the iconic peak, or hoisting their packs to begin the Overland Track or an overnight trip on the track's cousin.

The visitor is envious, but content with a slow walk around the beautiful lake, stopping to look – really look – at the shrubs and the trees and the birds flying overhead, with newfound understanding of their significance and diversity...



Cradle Mountain Visitor Experience: Policy and Planning Implications

Opportunities for new infrastructure and experiences at Cradle Mountain will be guided in the future by the new TWWHA Management Plan and the new Government's Expression of Interest process for tourism activity in Parks and Reserves.

It is recommended that the Master Plan for Cradle Valley should be updated, based on the outcomes of this Reimagining project, and the new TWWHA Management Plan.

A development application for a new Cradle Mountain Park Centre was approved by the Kentish Council in February 2012, and it is proposed that any new Visitor Information/World Heritage Centre would be sited at the 'transit terminal' or another location within the current Visitor Services zone, which already allows for such developments. The Dove Lake revitalisation, 'Taste of the Overland' overnight walk, and cycling opportunities will however require more careful consideration in the Master Plan and new TWWHA Management Plan – though the new Government has indicated its openness to amending the Management Plan if developments meet relevant criteria.

An implication of the Taste of the Overland opportunity is the need to identify sites that would be suitable for a commercial hut/wilderness lodge to provide accommodation for the overnight walk, and the feasibility of any new walking track infrastructure that might be required – both from tourism marketing and environmental perspectives.

Revitalising the visitor facilities and experience of Cradle Mountain will require public investment in the new World Heritage Visitor Centre, infrastructure around Dove Lake, walking trails, the Park road and new cycleway opportunity. The level of public investment required is estimated to be in the vicinity of \$21 million; however, it is expected that a revitalised Cradle Mountain precinct would attract greater numbers of visitors and provide stimulus for further private tourism investments – representing a return on investment within 2 years (see Tables 2 and 3). As part of the review of the Cradle Valley Master Plan and proposed Visitor Centre, consideration should be given to potential opportunities for further private investment, providing additional visitor infrastructure while reducing immediate and ongoing costs to government.

Estimated Costs of Cradle Mountain Visitor Experience	
Expense Item	Estimated Cost
Master Plan/Planning Assessment	\$200,000
Cradle Mountain Park Centre	\$13,500,000
Dove Lake Precinct	\$5,000,000
Walking Tracks/Hut	\$500,000
Cycle Way	\$1,000,000
Total Estimated Cost	\$20,200,000

Table 2: Estimated Costs of Cradle Mountain Visitor Experience
Expense items are informed estimates based on previous TRC and EC3 Global research and project experience.

Estimated Benefits of Cradle Mountain Visitor Experience			
	Additional Visitors (per annum)	Additional Nights (per annum)	Additional Expenditure (per annum)
Domestic Overnight Visitors	37,172	74,343	\$12,825,462
International Visitors	2,828	5,657	\$492,151
Total Additional	40,000	80,000	\$13,317,613

Table 3: Estimated Benefits of Cradle Mountain Visitor Experience
Source: The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).

The Cradle Mountain Visitor Experience: Enablers

The following strategic actions have been identified as the most critical for enabling the reimagining of the Cradle Mountain Visitor Experience to begin, and provide confidence to proceed with further actions and developments:

- A reviewed and updated Master Plan for Cradle Valley, including contemporised concept for World Heritage Visitor Centre
- A signal investment by the Tasmanian Government (World Heritage Centre)
- The Expression of Interest process for new tourism developments

Reimagining the Visitor Experience: Cradle Mountain

..back at the Dove Lake foreshore, the visitor can't resist returning to the secret viewing pod, warming up, protected from the elements, and soaking in the scenery a little longer.

Time to go, and the visitor joins one of the frequent departures back to the Visitor Centre. It's a different group, with some returning hikers, and a different guide on the glass coach, but the trip is just as engaging, if not more than the last. The guide's calm observations and quiet music brings the journey to a gently close.

Returning to their car, the visitor feels like it has been longer since they arrived. Though only a short journey down to the lake, when measured in kilometres, the visitor has been totally transported by their experience at Cradle Mountain, and emerged rejuvenated. The visitor has been immersed in the wilderness today, feeling a connection to the place they didn't think possible in such a short time.

Now they have been here, they would come back and do it all again. The visitor wants to stay longer and go deeper into the wilderness.

They hope to return with family and stay a few nights – more opportunity then to see the nocturnal animals and perhaps see a Tasmanian Devil in the wild.

On the way out, the visitor passes cyclists heading riding in; energised by their experience today, the visitor contemplates hiring a mountain bike, or taking one of those canyoning trips. Next time...



Gordon River Visitor Experience

Background

The Franklin and Gordon Rivers, the 'Wild Rivers' at the heart of the Tasmanian Wilderness World Heritage Area, are famous as the site of Australia's largest conservation battle, which successfully halted the Tasmanian Government's plans to dam and flood the Franklin for hydro-electric power in the late 1970s and early 1980s – and was also a key factor in the TWWHA first receiving World Heritage listing. Timber extraction by convicts and early pioneers has provided a rich collection of stories of hardship, adventure and pioneering spirit in the wilderness. The Wild Rivers are also culturally important to the Tasmanian Aboriginal community, though their stories have been less well known.

Geographically, the Gordon River is one of Tasmania's major rivers. The Gordon's source is in central Tasmania at Lake Richmond, from where it flows westward for about 193km before merging into Macquarie Harbour on the West Coast; gorges known as 'the Gordon splits' demarcate the Upper Gordon and the Lower Gordon River.

The West Coast village of Strahan and the Gordon River are another major access point, after Cradle Mountain, for visitors to the Tasmanian Wilderness World Heritage Area. In particular, sightseeing cruises on the Lower Gordon River, travelling into the river mouth from Strahan via Macquarie Harbour, are an important component of the West Coast's tourism industry – carrying around 100,000 passengers each year. Smaller numbers of visitors currently experience the Gordon (and Franklin) by seaplane, small private charter boat, kayaking, and longer rafting trips. Some walking tracks provide views of the rivers, much deeper into the Wild Rivers National Park.

Strahan is approximately 4 hours by car from both Hobart and Launceston. There are a range of small accommodation and hospitality providers in Strahan, as well as the major Strahan Village complex around the harbour. The West Coast Visitor Information Centre provides some information and interpretation for the TWWHA.

To reduce riverbank erosion, strict speed limits are applied to boats on the Lower Gordon River. Heritage Landing provides tourist boat mooring and a short nature walk amongst ancient trees (about 14km from the river mouth). Designated campsites with basic hut facilities are located at Pine Landing (near Heritage Landing) and Sir John Falls Camp/Warner's Landing (a further 16km upstream).

Vision

The Gordon River delivers the most contemporary wilderness World Heritage Area experience offering shared, life changing, moments.

Goals

- Make our customers heroes
- Provide personal, hands-on experiences
- Embrace the Tourism Conservation partnership
- Bring the Aboriginal stories and heritage to life
- Give experience providers confidence in new opportunities
- Deliver world's best practice that is measurable
- Embrace new markets and communication channels

Market Needs

The Gordon River (and Strahan) is a major gateway to the Tasmanian Wilderness World Heritage area, and like Cradle Mountain, new activities and revitalisation of the experiences currently offered will be needed to meet contemporary market expectations and attract higher visitor numbers to the region.

The West Coast has been significantly impacted by the changing visitor economy and shorter lengths of stays. Since 2009, the 'Western Wilderness' tourism region has experienced a significant drop in visitor numbers. The cruises operating on the Gordon River are a fundamental part of the visitor experience of the West Coast, Strahan and the Gordon River; however, the experience they provide is relatively unchanged from what they delivered 15-20 years ago. Both major cruises are still popular with current visitors but no major new products have been developed for Strahan and the Gordon in the same time period. Tasmania's high levels of repeat

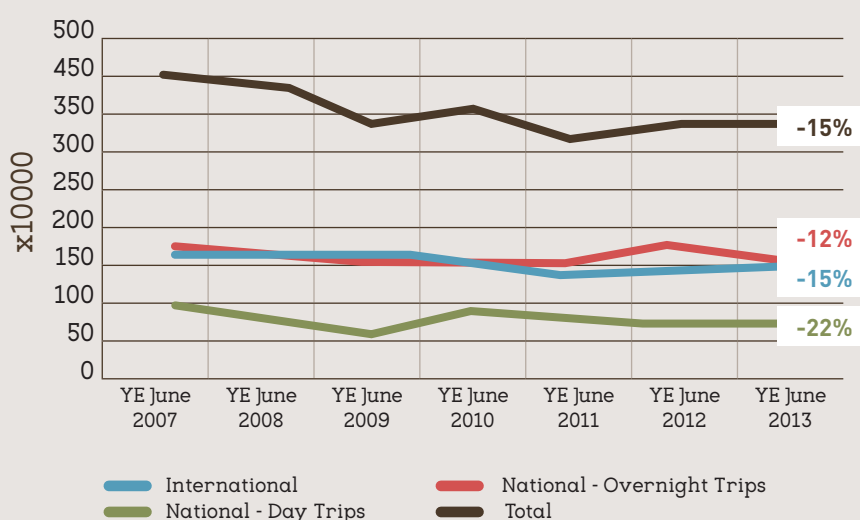


Figure 8: Visitor participation in Charter Boat, Cruise or Ferry Ride activities (Australia)

Source: National and International Visitor Survey, Tourism Research Australia 2013 (Year Ending June)



Strahan waterfront - credit Rob Burnett & Tourism Tasmania

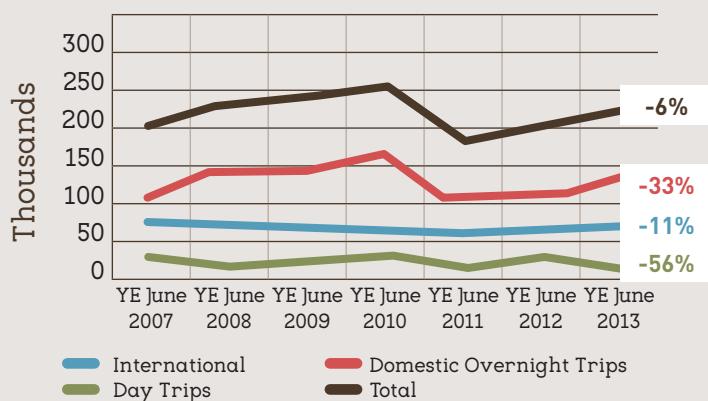


Figure 9: Visitor participation in Charter Boat, Cruise or Ferry Ride activities (Tasmania)

Source: Tourism Research Australia 2013, National and International Visitor Survey (Year Ending June)

decreased by 15% from 2007 to 2013 (YE June); however, the number of visitors participating in such activities in Tasmania increased by 6% in the same period (see Figures 6 and 7). Charter boat, cruise or ferry rides taken by visitors to Tasmania represent 5.5% of those activities undertaken nationally. With a number of major, high-profile cruise products emerging around the state since the Gordon River cruises commenced, it is now imperative for the Gordon River to contemporise its cruising/on-water experiences and reposition its unique selling point over other experiences in the market, including its status as the only cruise experience within World Heritage listed waterways in Tasmania.

visitation, changing market trends, and the declining number of visitors to the West Coast suggest that new Gordon River experiences are required to give visitors a reason to make the journey west.

While not directly featuring the Gordon River, the West Coast Wilderness Railway is another critical visitor experience on the West Coast. The globally unique Abt heritage rail experience was established as a tourism experience in 2002 specifically to provide a complementary visitor experience to the Gordon River Cruises. The performance of the Railway as a visitor experience mirrors the overall performance of the West Coast tourism industry, and the Railway is likely to benefit from additional visitor experiences established on the Gordon River and TWWHA.

The number of visitors participating in activities involving charter boats, cruises or ferry rides in Australia

Gordon River Visitor Experience: Revitalisation

Through the Reimagining project, it was identified that a range of opportunities exist for new or expanded product offerings, which align with the vision and goals for tourism in the TWWHA; and could revitalise the visitor experience of the Gordon River for a range of markets and lengths of stay, and which would benefit the struggling West Coast economy.

Innovations in technology (e.g. reduced wake vessels), interpretation and experience delivery, and reconsideration of the current TWWHA Management Plan provide opportunities to reimagine existing products and revisit past proposals for cruising, camping, and other accommodation options for the Gordon, and look at contemporary experiences in similar destinations in Australia and overseas.

The opportunity exists for commercial providers to offer a range of short, half day and full day touring experiences meeting the needs of a broader range of markets interested in having a World Heritage Wilderness experience. While not an exhaustive list, the following suggestions provide an indication of the type of adventure and/or 'luxury' activities that could be involved, introduced and expanded in revitalising the visitor experience of the Gordon River:

- On-water or waterside small wilderness accommodation
- Overnight accommodated cruises
- New 'crystal pod'/cruise experience
- Redevelopment of Heritage Landing to provide a wilderness experience more appropriate to an area of outstanding universal value
- Additional seaplane landing sites, new helicopter landing platforms
- Use of seaplanes/helicopters to connect short stay visitors with on-water experiences
- New river-based guided overnight tours and camps (kayak, small boat)
- Small boat and kayak day tours
- Food experiences
- Tasmanian Devil spotting (Sloop Point)

Gordon River Visitor Experience: Policy and Planning Implications

There are a number of policy and planning implications for the revitalisation of the Gordon River experience.

Cruise ship access on the Gordon River must be carefully managed to minimise the risk of bank erosion from the wash of larger tourist craft. Upstream access past Heritage Landing has not been permitted for major tourist craft since 1989. All commercial cruise boats are required by the TWWHA Management Plan to travel at six knots in the lower parts of the river to reduce the rate of erosion.

Future tourism developments in the Lower Gordon River need to be in line with the conditions specified in the license agreements for commercial craft, and the provisions of the Lower Gordon Recreation Zone Plan. Nonetheless, well managed water-based visitor experiences on the Gordon provide people with a means of visiting Tasmania's Wilderness World Heritage with minimal environmental impact, and without the need for significant permanent infrastructure. Innovation in experience delivery, and marine and seaplane/helicopter technology can overcome the limitations of speed and time to provide new and meaningful on-water experiences either side of Heritage Landing.

Reimagining the Visitor Experience: The Gordon River

A cold wind blows around the visitor, leaning against the rails, on the deck of a large cruiser heading out into Macquarie Harbour. After an arduous drive into through the spectacular but intimidating scenery of the west yesterday, the visitor already has an inkling of why the early settlers feared being sent to such a hostile place, out here at the edge of the world.

The boat tours the harbour out to Hell's Gates, where the sea wind blows the most viciously, and back to Sarah Island – where the visitor's perceptions of convict privations are challenged by an engaging actor, who shares the roles of colonial characters between himself and his audience, bringing an unexpected story to light, and the ruins to life.

Slowing down through the river mouth, the cruiser comes to a stop in a sheltered corner a little way up the river, and they are welcomed to the mighty Gordon, gateway to the wild rivers. Here, the travellers on the boat are separated into smaller groups – some to first take a walk in the forest, some to dine on the boat, others to splash about in Piners' punts and imagine what it was like to haul timber on the river – and on days colder, rainier and far less kind than this one.

Truly immersed in the river, they have not noticed their return to the landing. Stepping out into the crisp air, the visitor then joins the walk into the forest. The group's botanical knowledge is challenged and expanded by a capable young ranger, and there is time allowed to quietly lose themselves amongst the trees, away from the crowd...

Reimagining the Visitor Experience: The Gordon River

Later, the group is greeted warmly as they board a barge moored on the river, their accommodation for the night. They enjoy fine food, and their hosts point out on a map where the seafood came from – just nearby from the coast. Inspired by a few glasses of wine, the group discusses and debates their views and their shared experiences of the day, late into the night. Positions are challenged and friends are made. On the way to their cabin, the visitor stops to enjoy the stars, the clearest they have ever seen against the pitch black sky – so far from anywhere but at the heart of it all.

The visitor sleeps deeply, and drinking fresh river water with breakfast soon clears any symptoms of last night's wine. Late morning, as the mist rises slowly of its glassy surface, most of the group head back down river to try the Piner's punts, and take lunch on the cruiser back to Strahan. The visitors and two others have chosen to take a seaplane out. They take off from the Gordon and fly up and over the rapids and over the Franklin, so well protected now. They glimpse intrepid rafters on the rivers, see the mountain ranges rising around them and the lake waters in the distance.

The visitor feels privileged to have seen such truly special places, and despite the wet and the cold and the distance, they now understand why there has been such struggle to protect them, and why so many would want to visit.

CASE STUDY - Milford Sound - New Zealand's South Island



Milford Sound is known for its spectacular scenic and natural features, centred around the fiords created by glacial erosion. The region offers a variety of water-based ecotourism opportunities including small and large boat touring, kayak tours, overnight accommodated cruises, food experiences, and wildlife spotting.

A number of cruise options are available to experience the picturesque landscape; running day and night, every day of the year. Cruise vessels range from small tendercrafts and boats, to large catamarans and cruise boats with viewing decks. Experiences range from just over an hour in duration, to overnight cruises.

Kayaking and jetboat rides are also popular among visitors seeking more adventurous options. Other activities include diving, and visiting the discovery centre and floating underwater observatory where visitors are able to descend 10 metres underwater for uninterrupted 360 degree views.

Flight-seeing is also an increasingly popular choice for visitors, enabling tourists to fully comprehend the enormity of the natural landscape from above, and to take advantage of incredible photo opportunities. Helicopters and small seaplane fly tours start at 10 minutes and can go up to 3 hours in duration, with options for adding guided walks and food and wine experiences in remote locations, such as mountain tops.

This revitalisation will require a mix of public and private investment; however, assuming that fresh and revitalised tourism experiences on and around the Gordon River are able to bring back visitors old and new to arrest the West Coast decline, and recover 30,000 visitors to reach 2009 levels: the West Coast could benefit from an estimated \$9,980,000 additional visitor expenditure per annum (see Table 9). With visitor numbers to Tasmania reaching record levels, repositioning Strahan once again as a wilderness hub could see a new and significant visitor boom on the West Coast.

Estimated Benefits of Gordon River Experience			
	Additional Visitors	Additional Nights	Additional Expenditure
Domestic Overnight Visitors	27,879	55,757	\$9,619,096
International Visitors	2,121	4,243	\$369,113
Total Additional	30,000	60,000	\$9,988,210

Table 4: Estimated Benefits of Gordon River Experience

Source: The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).

The Gordon River Visitor Experience: Enablers

Through engagement with industry the following opportunities been identified as strategic priorities to enable the Gordon River experience revitalisation:

- Story-telling and experience development mentoring program for tourism operators
- Redevelopment of Heritage Landing to provide a wilderness experience more appropriate to an area of outstanding universal value
- The Expression of Interest process for new tourism developments
- Additional permits for seaplane access, including the potential for regular passenger transport services
- Permits for overnight accommodation on luxury vessels with up to 24 berths
- Permits for small vessels to access further reaches of the Gordon River
- Permits for small and charter vessels to use alternative locations, such as Sloop Point and Pillinger, to provide wilderness experiences (such as watching Tasmanian devils on the beach) and accommodation

Reimagining the Visitor Experience: The Gordon River

...the visitor joins another group in a strange and wonderful glass pod; with the engine submerged underwater, the pod moves gracefully through the water, further upriver, and around the next bend. As they pass out of sight from the boat, a soundtrack begins to play inside the pod. They are reminded of the 'pristine' natural values of this wilderness World Heritage, evident in their surroundings – and then human stories of the river are brought to life before their eyes.

The daily lives, and the conflicts and controversies of aborigines, colonials, miners, piners, explorers, photographers, dam workers, protestors, local residents and the growing tourism industry are projected in the crystal pod and onto the river. The experience is surreal, super real, bombarding the group with a wide gamut of perspectives and emotions as they realise the role they play in the Gordon's landscape.

Back at the landing again, the visitor and a few others leave the day-trippers, and are ferried upriver on a small boat. They trail their hands through the water. Coming up alongside the eroded hollows at the base of the river wall, they test their voices and marvel at the echoes and the subsequent silence. A sense of anticipation builds as they travel closer to Sir John Falls and the site of the Franklin blockade. The visitor imagines they are on a pilgrimage of sorts, making the long journey to a site of such significance, with its myriad implications for modern society.



The World's Oldest Living Tree

Background

Mount Read – at the north-west edge of the West Coast Range, just below the mining town of Rosebery, and in immediate proximity to the Tarkine region and the TWWHA – is home to some remarkable trees.

Mount Read supports an extraordinary number of rare and endemic tree species in rainforest communities of real conservation significance. Most notable is a stand of Huon Pine (*Lagarostrobos Franklinii*) – ‘the oldest living tree in the world’.¹³

Huon Pine trees are one of the world’s longest living species, and can live for up to 3,000 years. Climatologists have been able to establish a continuous record of climatic change over more than 3,700 years by studying the tree rings of these ancient trees.

Huon pine is also an icon of Tasmania, unique to the state, with strong historical links to the development of West Coast settlements and shipbuilding trade in the convict era. The golden timber is easy to work, fragrant, and extremely durable and rot resistant due to its natural oils.

The solitary stand of Huon Pine at Mt Read is Tasmania’s oldest resident and the highest growing Huon Pine in the state; it has been growing for over 10,000 years and covers a hectare of the mountain. The stand is all male and has cloned itself continually over the millennia – individual stems age from 1 to 1,500+ years, but the stand, as a genetically consistent organism, is likely the oldest living tree in the world.

Mt Read, sitting among glacial lakes, is an extreme wilderness environment – it is the wettest place in Tasmania, with 3,000mm rainfall per annum; it experiences frequent snowfall; and was devastated by a bushfire in the 1960s, which stopped just short of the Huon Pine. However, Mt Read also has a strong human history, of Aboriginal settlement, the Hercules Mines (1894 – 1999), settlements and other activities on its slopes.

The Mt Read Huon Pine is located outside the Tasmanian Wilderness World Heritage Area and is not part of any

13. Lloyd, Graham 2011, ‘The Oldest Tree’, *The Australian*, Sydney, accessed June 2014 <http://www.theaustralian.com.au/news/features/the-oldest-tree/story-e6frg8h6-1226130673929?nk=cc9cdebefbf7c8a9f2d50b3a1bcb235c>.



Vision

The World's Oldest Tree delivers the most contemporary wilderness experience offering shared, life changing, moments.

Goals

- Make our customers heroes
- Provide personal, hands-on experiences
- Embrace the Tourism Conservation partnership
- Bring the Aboriginal stories and heritage to life
- Give experience providers confidence in new opportunities
- Deliver world's best practice that is measurable
- Embrace new markets and communication channels

National Park; it is however protected within the Lake Johnston Nature Reserve, in accordance with the Lake Johnston Nature Reserve Management Plan 1999. Access is carefully controlled and limited numbers are able to visit each year with a licensed tour operator, via 4WD track and boardwalk.

Market Needs

The Mt Read Huon Pine, the world's oldest living tree, could become an iconic symbol of the outstanding universal value of Tasmania's Wilderness – and not limited to the TWWHA. As such, it could also become a significant visitor attraction, and a natural 'pilgrimage' site.

Emerging high-yield visitor markets in the global health and wellness sector are forecast to grow by 9% per annum internationally – nearly 50% faster than current growth in conventional tourist markets.¹⁴ Australia is predicted to see between 5.5 – 8.5 million 'wellness' tourists in the next five years, driven by both an ageing population and increasing rates of illness, as well as a rising health and wellness culture among younger people.

International wellness tourists to Australia spend 65% more than "normal" tourists, while their domestic equivalents spend almost twice the amount of non-wellness tourists.

As an attraction, the Mt Read Huon Pine could draw a broad range of visitors, from those motivated by the idea of building a strong connection to place; to the more spiritual aspects of the site, and its ancient links; as well as those interested in environmental systems and conservation.

Rosebery, Tullah and Zeehan (the small mining towns loosely ranged around the Mt Read area – around 1 hour north from Strahan by car) received 19,000 overnight visitors in the YE2013, just 14% of total overnight visitors to the West Coast.¹⁵ Any exciting new tourism developments in this region would create greater awareness of the area, and increase day and overnight visitor numbers significantly against the current numbers, while also feeding into Strahan and other West Coast experiences.

14. Global Wellness Institute 2014, *The Global Wellness Tourism Economy 2013*, Global Health and Wellness Summit, New York.

15. Tourism Tasmania 2013, *Tasmanian Visitor Survey*

Reimagining the Visitor Experience: The World's Oldest Living Tree

The visitor meets the guide at the appointed time and place, in the unassuming little mining town of Rosebery. It is a full group of ten today, and they stand shuffling their food on the pavement, eager to head off and see what they have come to see.

They pile into two four-wheel drives for a bumpy ride into what is seemingly the middle of nowhere. Some way along a steep old mining road, they suddenly stop. Everyone has to wash down their hands and boots in specially designed trays and tubs in the back of the vehicles. They wipe clean their cameras and any tripods. They empty their pockets of lighters and matches lest they cause any damage to this precious environment. Dressed up as if for a factory tour – covers on their shoes – they enter the forest. Anticipation builds.

Some time later, the visitor has lost track of time and direction – unconvinced that the guide is taking them the most direct way to this tree. It has begun raining and visibility is declining rapidly. Then, high on the slopes of Mt Read, the guide pulls out a big bundle of string from his pack, and lays it along the forest floor: 10 metres of string, representing a timeline of the last 10,000 years.

Beginning at the beginning, they find humans in the Middle East building the earliest permanent farming villages. Follow the string for 7 metres, and nearly 7,000 years later King Tutankhamen was alive in Egypt. Another metre, another thousand years – the Romans span an enormous empire and Jesus is born. A metre and a half from the end, Rome falls, and the prophet Muhammad dies...

... holding the last ten centimetres of string, the guide reels off quantum theory, transatlantic radio, human flight, WWI, WWII, the Cold War, the Great Depression, penicillin, civil rights, the moon landing, computers, the internet, mobile phones.

Most of the group has only been alive for three to five centimetres. The world's oldest living culture, the Tasmanian Aborigines have been here four times as long as the tree. Significant mining and logging has occurred around this area over the last ten



Experiencing the World's Oldest Living Tree

While outside the prescribed Tasmanian Wilderness World Heritage Area, the Mt Read Huon Pine offers a strong story as the world's oldest living tree that aligns well to the values of the Tasmanian wilderness.

Marketing the world's oldest tree as an icon of the Tasmanian Wilderness would impart a heightened sense of purity, wholeness and spiritual elements for visitors to the region, without visitors necessarily having to visit the tree itself. Whether in the Tarkine, the TWWHA or surrounding areas, proximity alone to the same environments as the world's oldest tree would add an unique point of difference, exclusivity, and legitimacy to new 'wellness' tourism developments such as spas, health retreats, and meditative experiences – in combination with pure water, clean air and other wilderness attributes.

Given the unique status of the Mt Read Huon Pine, and sensitive surrounding environments, it has a limited visitor carrying capacity and will need careful ongoing conservation management and protection. However, innovative tourism products could offer fulfilling experiences around the concept of the Mt Read Huon Pine, for a larger number of visitors than present, without having to spend significant time viewing the tree itself. Indeed, due to weather conditions on Mt Reed, the tree is often shrouded in mist and cannot be seen; however, visitors would still be able to 'stand in its presence'.

Developing innovative tourism experiences around the Mt Read Huon Pine also provides the opportunity to provide new Green Guardian-style¹⁶ visitor experiences that engage in hands-on conservation activities in nearby areas and/or raise additional funds for the conservation of the Huon Pine and other sites in the Tasmanian Wilderness.

By providing sustainable 'access' to the world's oldest tree through world-leading practice and interpretation, the Mt Read Huon Pine could become part of the global 'pilgrimage' trail for those seeking more than the 'usual tourist sites'.

16. Green Guardians is a voluntourism program in Tasmania where visitors undertake conservation activities as a small proportion of guided tours. Tasmania Parks and Wildlife Service 2014, *Green Guardians, Tasmanian Government, Hobart*, as at June 2014 <http://www.parks.tas.gov.au/index.aspX?base=24210>.



Tarkine Rainforest Track - Alice Hansen & TTAS

Reimagining the Visitor Experience: The World's Oldest Living Tree

centimetres, including right up the slopes of this mountain. This tree they have come to see has only been legally protected for the last three. A wildfire ripped across Mt Read in the 1960s, but the world's oldest tree is still here.

But where is the tree they have come to see? The guide points forward, and they adjust their eyes, through the mist, to a spot some twenty metres away. The 'tree' stands in front of them, all around. Dozens and dozens and dozens of seemingly individual trees are all joined together. One tree that has cloned himself again and again and set down new roots to survive. Parts may have died, but this tree, this organism has prospered away quietly, spreading over a hectare in this far corner of the world for the past 10,000 years or more.

The visitor is shown a cross section of a Huon Pine, what looks like a mere twig, and asked to count its rings. This twig is more mature than most trees they have seen, and the guide explains that at least one stem of Huon Pine in this stand has over 4,000 rings, tracking its history and the changing climate in which it grew up.

The guide teaches them to distinguish between the ancient Huon Pine, and the proliferation of other rare plants and pines in this sanctuary – King Billy, Pencil, Chestnut, Creeping and Celery-Top, some of them near here a thousand years old themselves alone.

And all too soon they must leave this place. Returning through the forest in the rain, they emerge cold and wet and clamber back into the four-wheel drives for an uncomfortable trip back. Nobody minds. They have come all this way for a reason, and they are happy – some mystically, almost transcendently so. They have truly experienced the globally significant Tasmanian wilderness, and they have seen the oldest living tree in the world.

Collecting their various belongings from the vehicles, each guest is treated to a parting gift: a tiny Huon Pine seedling, their own little piece of history.

The World's Oldest Living Tree: Policy and Planning Implications

The Mt Read Huon Pine is currently under one of the highest levels of protection offered by the state of Tasmania, and limited access is already available to licensed tour operators.

There is an opportunity to seek industry ideas and investment in new products that can deliver the experience of the world's oldest tree to more visitors, in a sustainable way, through the Government's new Expression of Interest process for new tourism developments. Operators will need to work within the constraints of the area's limited carrying capacity and its remote and rugged access routes, maintaining biosecurity controls and other license conditions. Risks to the tree associated with greater awareness of it and its location will have to be carefully managed.

The World's Oldest Living Tree offers enormous potential to develop an iconic brand for the Tasmanian wilderness, and create international attention and awareness of Tasmania. The Mt Read Huon Pine could provide a unique competitive advantage for Tasmania, as there can only be one 'oldest living tree' in the world.

The World's Oldest Living Tree: Enablers

- Incorporation of the World's Oldest Living Tree into Tasmania's destination marketing
- The Expression of Interest process for new tourism developments
- Clearly defined and regularly updated carrying capacity and parameters for visitor access to the Mt Read Huon Pine



Wilderness Accommodation

Background

World class ecotourism experiences are one of the main reasons for international and domestic visitors to travel to Tasmania. No longer a niche market, ecotourism is now one of Tasmania's greatest competitive advantages and the Tasmanian Wilderness World Heritage Area is at the very heart of this advantage.

Freycinet Lodge (self-contained cabin accommodation, with activities and restaurant inside Freycinet National Park on Tasmania's East Coast), Avalon Coastal Retreat and Rocky Hills Retreat (small self-contained properties located in private bushland on the East Coast), and Huon Bush Retreats (small self-contained cabin accommodation in privately conserved bushland in the Huon Valley, southern Tasmania) are just a few examples of the environmentally sensitive, low-impact, contemporary accommodation developments popular with visitors to Tasmania – located in areas of conservation value all around the state.

However, there are currently very few examples of privately operated visitor accommodation inside the boundaries of the Tasmanian Wilderness World Heritage Area: Tasmanian Walking Company's Cradle Mountain Huts (along the Overland Track), Par Avion's Port Davey Wilderness Camp, Pumphouse Point Lake St Clair (under construction). Corinna Wilderness Experience, Cradle Mountain Lodge and other wilderness accommodation in the Tarkine and Cradle Valley also provide World Heritage-quality wilderness experiences outside of the TWWHA boundary.

Well-managed eco-opportunities such as these, operated by private enterprises, are generally able to offer a level and type of visitor experience, customer service and innovation that is difficult for government agencies, such as the Tasmanian Parks and Wildlife Service, to provide using limited in-house resources and expertise.

Wilderness accommodation can be anything from a low-impact 'luxury' tent accommodation, through to singular module/cabins, and more traditional lodge style accommodation.

There is significant opportunity for more, new, low-impact, environmentally sensitive wilderness accommodation to be developed inside and around the edges of the TWWHA, in order to deliver more immersive World Heritage wilderness experiences for visitors – and provide greater accommodation capacity for visitors to the TWWHA.

Vision

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Goals

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Market Needs

This section provides an assessment of market demand for wilderness accommodation and pre-feasibility assessment of opportunities suited to private sector investment in the TWWHA, as well as the principles for seeking investment.

Research confirms that Tasmania's wilderness experiences have the strongest emotional associations, the strongest appeal and are the most potent motivators to shift travel intention to Tasmania for a range of target markets.¹⁷

Today's visitors expect much richer experiences in nature, seeking to reconnect with the environment on a personal level. Changes in traveller preferences and expectations, and the types of experiences offered in competitor destinations is affecting visitation to TWWHA.

There has been strong growth in the number of nights spent in Tasmanian eco-accommodation in recent years. Between 2010/11 and 2012/13, the number of nights spent in wilderness accommodation by visitors to Tasmania increased by 14%, representing significant growth in this market when compared to other accommodation types (see Table 5 and Figure 8 on page 38).

17. Tourism Tasmania 2010, *Appeal Triggers and Motivations for Tourism in Tasmania*



Accommodation	2010/11	2011/12	2012/13	% growth
Wilderness Lodge	150,033 (73% in 4-5 star Wilderness Lodges)	145,390	173,477 (81% in 4-5 star Wilderness Lodges)	+15
Bed & Breakfast	211,875	163,960	162,553	-23
Tent/Camping or Cabin (not Caravan Park)	190,843	163,761	200,451	-5
Standard Hotel (below 4 stars)	370,298	357,095	395,801	+6
Luxury Hotel (4 or more stars)	1,000,091	941,199	969,724	-3

Table 5: Number of Nights Spent at Wilderness Lodge and selected other Accommodation types 2010/11 – 2012/13

Source: Tourism Tasmania, Tasmanian Visitor Survey 2010-2013

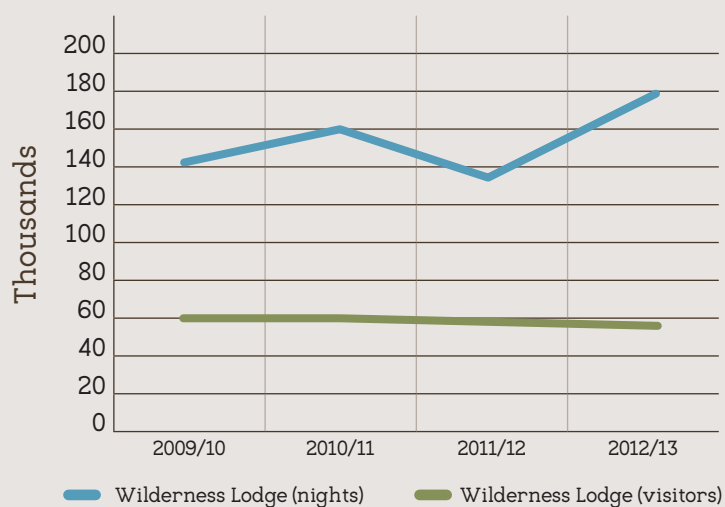


Figure 10: Number of Visitors and Nights Spent at Wilderness Lodge

Source: Tourism Tasmania, Tasmanian Visitor Survey 2009-2013

Recent research (reference) on eco/wilderness accommodation in Australia indicates that international travellers are more likely to consider eco/wilderness accommodation compared to domestic travellers (82% versus 62%).¹⁸

Visitors seeking reward, pampering and comfort luxury seekers have a preference for the premium options of eco/wilderness accommodation (eco/wilderness resort or lodge/cabins); while visitors seeking constant stimulation and action adventure seekers have a preference for the more basic options (basic or upmarket tented accommodation). Affluent luxury seekers view eco/wilderness accommodation as a whole experience, and evaluate accommodation and destination as a package when making a decision to travel.

18. Tourism Research Australia 2011, Destination Visitor Survey: Strategic Regional Research – Western Australia. Eco-accommodation Product Development Research: Summary of Results. Commonwealth of Australia, Canberra.

Key planning factors for interstate visitors to regional Tasmania include¹⁹:

- Limited time in Tasmania (i.e. four days or less);
- Limited understanding and awareness of the distance and travel time between locations;
- Desire to be settled in one location and to not 'travel around', particularly when travelling with children or in a larger group;
- Accommodation options, attractions, activities and events on offer at a destination.

Therefore, wilderness accommodation providing a base for visitors to explore the TWWHA (including services such as private walking tracks, quality interpretive guides, and a range of other activities) are therefore likely to be especially suitable for, and attractive to the following identified growth markets:

- High Net Worth individuals
- Off-season travellers (particularly the walking market)
- Younger couples
- Experience Seekers

Wilderness Accommodation: Opportunities

The Government's Expression of Interest process for new tourism developments in National Parks and reserves offers an opportunity for investors to select suitable sites for small scale, sensitive accommodation wilderness accommodation, in areas where sustainable management of natural and cultural values can support a new development.

New and innovative examples of commercial, wilderness accommodation in and around the TWWHA – with associated food and wine experiences, guided tours and more – would provide greater opportunities for visitors to experience, learn about, and become advocates for unique wilderness destinations, which they may otherwise have not been able to visit. Iconic wilderness accommodation developments, when supported with extraordinary natural or cultural settings and experiences, also provide a strong aspirational message for potential visitors, and increase broader awareness of a visitor destination.

Investment in small-scale wilderness accommodation will make the TWWHA more attractive for new, higher-yield markets; while existing accommodation options should also attract greater

Case Study: Lake Moeraki Wilderness Lodge – New Zealand



Lake Moeraki is a 28-room lodge, set in the heart of the 2.7 million hectare South West New Zealand World Heritage area (Te Wahipounamu). Established in 1989 to help protect the rainforests, the lodge runs their own hydro-electric generator, has an active energy efficiency programme, and recycles all possible rubbish.

Lake Moeraki Wilderness Lodge works in partnership with the Department of Conservation and has been pioneering in demonstrating how to protect New Zealand's ancient rainforest from logging, and create employment to boost local communities through nature-based tourism. The lodge owners are actively involved in protecting and promoting New Zealand's natural heritage and Lake Moeraki was the first accommodation in the country to be awarded Qualmark Enviro – Gold accreditation.



numbers of visitors from aspirational marketing efforts association, and stimulate further investment in refurbishment and expansion.

Precincts with the potential to support a wilderness lodge, and identified as priority locations for wilderness accommodation through the Reimagining Project (see Figure 9) include:

1. Gordon River: on-water or in the wilderness, on the Gordon or nearby, potentially as a satellite from Strahan
2. The Tarkine: as a base for a wilderness walk across the Tarkine or for water-based adventure experiences on the Arthur River
3. Maydena/Mount Field
4. Adamsfield
5. Melaleuca-Bathurst Harbour
6. Port Davey
7. Recherche Bay



Figure 11: Potential precincts for wilderness accommodation

Wilderness Accommodation: Policy and Planning Implications

A range of factors will affect the commercial viability of any wilderness accommodation proposal. Factors that will need to be carefully considered by the Government during the Expression of Interest process include: time and costs associated with the procurement and approval processes; site appeal; site flexibility; tourist markets for the product; and intellectual property.

The following points will be fundamental to the success of the Expression of Interest process, and also to the provision of appropriate, sensitive, and attractive wilderness accommodation and experiences in and around the Tasmanian Wilderness World Heritage Area:

- It must be recognised that sustainable, landscape appropriate and brand aligned eco-accommodation opportunities can significantly add to the visitor offer and experience of the wilderness, and that appropriate sustainable developments will have environmental, social and economic benefits.
- Tasmanian Parks and Wildlife Service must be open to appropriate proposals for eco-accommodation, and offer suitable sites where a need has been identified.
- A triple bottom line, sustainability-driven, objective approach to assessing proposals must be adopted to minimise political determination in the process.
- The vision, innovation and market knowledge of entrepreneurs and investors must be acknowledged by offering choice in accommodation site options, without being overly prescriptive.
- The process must minimise the level of investment required by Government and investors before it is clear that a site will be available for and capable of development.
- A case management approach should be adopted to support investors in proceeding to development, allowing for efficient dealings with multiple Government agencies.
- Government must be sensitive to the fragile feasibility aspects of many sites and offer adequate tenure terms to support business viability.

Wilderness Accommodation: Enablers

- The Expression of Interest process for new tourism developments
- Increased provisions for accommodation developments as a permitted land use at key precincts in the new TWWHA Management Plan

Case Study: The Uakari Lodge – Brazilian Amazon

Located inside a pioneering conservation project in Brazil (the Mamirauá Reserve - the largest reserve made exclusively to protect the Amazonian floodplain), the Uakari lodge consists of ten floating wooden apartments with minimal environmental impact, and has been created to provide services for eco-tourists interested in the Amazon and in its conservation.



The lodge's objectives are to generate income for the local communities; to strengthen community organisation, and to create incentives for the local communities to promote conservation of natural resources.

The lodge is linked to a regional institute's ecotourism programme. The lodge's planning and development was carried out over ten years by the local communities in partnership with the researchers and technicians of the regional institute. The lodge supports local research projects that generate scientific subsidies for the conservation of the surrounding natural area.



Air Access

Background

The isolation of Tasmania's Wilderness World Heritage Area (TWWHA) is integral to its visitor appeal and exceptional qualities as a nature tourism destination, one of the most pristine and untouched remaining wilderness areas on Earth. However, providing the capacity for visitors to access and experience these remote locations is essential to its success as a tourism destination.

Aviation has provided the means for humans to access some of the most remote parts of Tasmania since the 1930s when an air strip was first established on the West Coast at Queenstown. Light aircraft first started flying into Melaleuca in the 1950s, establishing a direct air route into a part of Tasmania previously only accessible through a multi-day trek or sea voyage. In the 1960s light aircraft started regularly landing on the original Lake Pedder beach and float plane services commenced into Strahan. In the late 1970s an airstrip was established just outside Cradle Mountain.

Currently commercial air access is limited to seasonal daily air services by light aircraft to Melaleuca and Bathurst Harbour, along with chartered float plane tours by tour companies operating out of Hobart and Strahan. Regular light aircraft services to Strahan have been attempted by commercial carriers at different times over the past thirty years, most recently in 2002, but were discontinued due to poor patronage. Airstrips are maintained at Queenstown, Strahan and Melaleuca, providing significant infrastructure capacity at these key gateways to the wilderness.

Helicopters have provided critical access into more remote landscapes for industrial, land management and public safety purposes; however, the TWWHA Management Plan has restricted helicopter access for tourism and recreational purposes.



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Market Needs

In order to create and encourage new experiences, and to enhance visitation and dispersal, it is a priority for industry to encourage and foster greater air access into the 1.4 million hectares of the TWWHA. Expanding the capacity for visitors to access the TWWHA through a range of aviation modes provides opportunities for new visitor markets to experience these destinations.

As the visitor trends to Tasmania and the West Coast indicate a contracting average length of stay – more frequent but shorter visits – providing the means for more visitors to access the TWWHA by air will encourage greater regional dispersal. It will also encourage new visitor markets, including higher spending visitors, to experience the further reaches of the state where previously they may have been discouraged by long driving distances.

Heli-touring and other air-touring (by light aircraft or floatplanes) is a common and popular visitor experience in areas of high nature conservation, providing unique perspectives over landscapes, and with minimal visitor impact on the natural environment.

Strahan could also re-emerge as a major destination and gateway to the TWWHA with the establishment of regular, relatively affordable air services directly from the major population centres, reducing the tyranny of distance.

Within the priority project of enhancing air access to the TWWHA, four key opportunities have been identified:

- A business case on the different options for upgrading infrastructure for aircraft access to Melaleuca to enable greater passenger transport into the South-West, including extending and/or sealing the existing airstrip, and establishing a GPS navigation.
- Marketing and product development support to establish and foster a regular commercial air service to Strahan, positioning Strahan as a wilderness gateway and hub for short-breaks through regular light aircraft and float plane services directly from Tasmania's population centres.
- Providing more options for Helicopter tours and float plane access within the TWWHA would enable greater opportunity for day trip visitation and dispersal to more remote areas of the TWWHA, as well as the potential for regular passenger transport between key locations in and around the TWWHA.



Air Access: Melaleuca

Background

The Melaleuca Airstrip is situated at Bathurst Harbour, in the South-West of Tasmania. The strip is 430 metres long by 30 metres wide and is made of white quartzite gravel; only permitting landing for certified pilots with small short take-off and landing (STOL) aircrafts. The airstrip is used primarily to service hiking needs by bringing in or picking up tourists completing the South Coast or Port Davey Tracks which meet at Melaleuca, as well as guided day trips for visitors to experience the area. The area has limited facilities including a ranger station, two huts for walkers, and campsites nearby.

Market Needs

The South Coast Track, Melaleuca and Bathurst Harbour are emerging destinations for the TWWHA, receiving around 6,000 visitors per annum. With a planned \$2 million upgrade of the South Coast Track and a new accommodation camp commencing operations over the summer of 2014/15, this region not only offers considerable potential for future visitor growth but has a current need for more consistent and reliable air access to service immediate visitor demand.

Currently air capacity to Melaleuca is limited by the length of the airstrip, restricting the size of aircraft able to fly into the area and limiting services from Hobart.

Enhancing Air Access to Melaleuca

Expanding or sealing the length of the airstrip, along with installing GPS Navigation Aids, would significantly improve the reliability of existing air services. It would also provide the capacity for more modern, larger aircraft to access the region, including from airports other than Hobart.

A GPS Approach will improve the reliability of services to the area, which is prone to high turbulence and difficult weather, by providing location and time information in all atmospheric conditions to pilots.

An infrastructure upgrade would support existing visitor activities and tourism operations in the remote South-West while also encouraging new visitor experiences and activities in the region.

It would also potentially introduce new routes to access the Tasmanian Wilderness World Heritage Area, including charter tour flights from Launceston and Melbourne. Enabling larger aircraft to service Melaleuca would also assist in developing greater economies of scale to reduce costs for tourists, opening the destination to new visitor markets, and increasing the viability of transport operations.

Based on current visitor numbers and average expenditure, every 10% increase in passenger arrivals to Melaleuca to experience the South-West Wilderness Camp, day tours, kayaking tours, or to walk the South-West Track equates to a further \$300,000 in direct visitor spending in Tasmania. Investment in upgrading the airstrip infrastructure is likely to generate long-term growth in visitor numbers to the region, and any government investment should be viewed as a strategic investment to stimulate increased visitor activity to the region and ultimately private investment in new tours and visitor infrastructure (see Tables X & X).

Description	Cost
Business Case to consider the different options to upgrade the Melaleuca Airstrip	\$50,000
GPS Navigation Aid	\$50,000

Table 6: Identified Opportunity for Melaleuca

Source: Cost estimates are based on previous project experience and online research, including consultation with AirTasmania during this project.

Financial Benefits of upgrading Air Access to Melaleuca			
	Additional Visitors	Additional Visitor Nights in Tasmania	Additional Visitor Expenditure
Domestic Overnight Visitors	558	1,673	\$228,572
International Visitors	42	127	\$11,073
Total Additional	600	1,800	\$299,646

Table 7: Benefits of Air Access to Melaleuca

Source: The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).

Policy And Planning Implications

Under the current TWWHA Management Plan, 1999, extension of the existing airstrip at Melaleuca is permitted as long as it does not intrude to within 30 metres of the Moth or Melaleuca creeks, and maintains the same alignment as the present airstrip. It is expected the new TWWHA Management Plan under development by the Tasmanian Government will maintain these provisions.

The GPS Approach has no implications for the current Management Plan or Parks and Wildlife policy, as it would only increase the frequency of arrivals



Air Access: Strahan

Background

Strahan airstrip is located 3.7km to the west of the Strahan town centre and is the main airport for the West Coast of Tasmania. The Strahan airstrip is currently used primarily for private light charter flights.

The airstrip has a North-South orientation runway with a bitumen pavement of 1220 x 18 metres contained by a gravel runway of 1220 x 30 metres, contained within a runway strip of 1340 x 90 metres which is delineated by white gable markers on its extremities.

The runway is lit to provide for night take-off and landing operations. The runway lights are pilot activated at a frequency of 122.8 MHz. The reporting officer can manually operate lights with the Gate key.

Market Needs

Strahan is a primary gateway for the TWWHA, providing immediate access to the Gordon River, the Sarah Island Penal Settlement, and the unique Abt-system West Coast Wilderness Railway. As an established visitor destination, the Strahan township provides a broad range of accommodation and hospitality options, along with a range of attractions, tours and visitor experiences.

Introducing regular commercial passenger flights to Strahan would enable increased visitation to the TWWHA, establishing Strahan as a visitor hub for the surrounding areas, and providing an alternative option for visitors to experience Tasmania's West Coast and the TWWHA without the barrier of a long and often challenging drive.

The Strahan airstrip has been identified as the airstrip with the most potential for future development on the West Coast, due to its orientation, location and existing infrastructure. The burgeoning sea farm and production activity in Strahan, with a significant and growing 'fly-in-fly-out' workforce also provides a critical mass of potential regular users of a commercial air service to complement and underpin the tourism market.

Establishing a Regular Air Service to Strahan

Introducing a regular air service to Strahan during a period of low visitor growth to the region would be a major strategic investment by a carrier, requiring a long-term outlook on the market potential. This investment would need to be heavily supported by the local tourism industry, local government and West Coast community, along with the State Government, State and Regional Tourism Organisations.

On-ground support, including transport and logistical arrangements for visitors arriving in Strahan via air would need to be developed. Marketing and public relations support would also be required, to introduce the new market proposition of travelling by air to the West Coast.

Some capital would also be required to upgrade passenger facilities at the Strahan Airport in order to provide a reasonable level of comfort and the necessary facilities to what may initially be a premium visitor experience (see Package Model for Air Access to Strahan).

In the long-term, there is significant potential for regular air services to Strahan to bring increased visitor numbers and new markets into the West Coast region and wilderness areas. However, this will require substantial investments in infrastructure at Strahan to provide capacity for larger aircraft.

Policy and Planning Implications

It is recommended that a working group of key stakeholders be established to progress the opportunity and establish a detailed business case for introducing a regular air service to Strahan. This group should include representatives of the Tasmanian Government, West Coast Council, local tourism and aquaculture industries.

This working group should consider what public assistance could be offered to support a service, including short-term business and marketing assistance for proponents, along with required infrastructure upgrades at the Strahan Airstrip, and on-ground support at Strahan.

Package Model for Air Access to Strahan

Developing an all-inclusive flight package for the West Coast is one potential model for testing the market and develop the necessary visitor 'infrastructure' for regular passenger services into Strahan.

Starting with an initial twice-weekly service over the peak tourism season, using a single-engine light aircraft, departing from Hobart and arriving in Strahan, an all-inclusive two-night package could be developed; incorporating iconic visitor experiences of the region including Gordon River cruising and the West Coast Wilderness Railway, as well as unique small group options for adventure or personalised food and wine experiences – plus on-ground transport and accommodation.

A twice-weekly service over the 6-months of the peak visitor period (December to May) using a 9-seater aircraft (with a minimum 75% loading) would bring 350 additional visitors to the West Coast over 52 services.

The minimum operating costs to the air carrier would be approximately \$2,000 per flight, requiring an immediate commitment of \$100,000 to operate the 6-month service. Assuming an additional \$100,000 for product development, marketing and on-ground costs, the initial investment by the carrier would need to be in the order of \$200,000.

To make such a venture commercially viable, the carrier would need to generate a minimum return of \$600 per passenger to break even. Allowing for an additional (minimum) \$400 per passenger for on-ground accommodation and activities on the West Coast, this would mean a \$1,000 (minimum) package experience, which is about twice the current average daily visitor spend on the West Coast – therefore marketing as a premium product.

A single-engine light aircraft can be managed on the existing airstrip and does not require any substantial capital investment to the airstrip. However, in order to support the viability of such a service, a significant investment in product development and marketing support will be required. While in the short-term, this service would deliver relatively low numbers of additional visitors to the region, it would assist in reaching new markets, establishing air access as a valuable part of the visitor experience of the TWWHA, and open the opportunity for more regular passenger services in the future.



Air Access: Helicopter and Seaplane Touring

Background

As infrastructure to support light aircraft services to the TWWHA is currently limited to Melaleuca and Strahan, alternative solutions such as floatplane and helicopter transport and touring should be encouraged.

Fixed-wing floatplanes and helicopters offer important advantages, with as minimal on-ground infrastructure requirements, enabling access to some of the more remote regions of the TWWHA.

Floatplane and helicopter tours are a feature of the visitor experience in comparable destinations, including the wilderness areas of New Zealand and Canada, and would provide an environmentally low-impact and commercially sustainable transport solution for Tasmania.

Floatplane and helicopter operators already operate across Tasmania, and the opportunity presents to expand these activities across the TWWHA.

Market Needs

The development of helicopter and floatplane touring experiences would align with several trends of interstate and international visitation to regional Tasmania, including: limited time in Tasmania (i.e. five days or less), the desire to be settled in one location, and increasing demand for outdoor/nature or 'soft adventure' activities which do not require significant physical activity.

Helicopters and floatplanes offer opportunities to link with and support other tour and experience providers such as kayaking, rafting, walking, food and drink, fishing, remote wilderness accommodation and more; as well as giving visitors a unique perspective over the diverse landscapes of the Tasmanian Wilderness.

Expanding Helicopter and Floatplane Opportunities

Helicopter and floatplane touring has been identified as having a significant ability to enhance visitor access and the visitor experience of the TWWHA. Operating out of key locations such as Hobart, Launceston and Strahan, half day and full day tours would enable visitation to remote areas of the TWWHA whilst keeping tourism at a low volume.

Floatplanes also provide a genuine option for regular transport services into regional areas. Using larger hybrid floatplanes able to land on airstrips as well as on water offers an alternative to light aircraft to develop services between wilderness hubs like Strahan, Cradle Mountain, and Melaleuca, and population centres including Hobart, Launceston, and Devonport/Burnie with minimal infrastructure requirements.

Policy and Planning Implications

The TWWHA Management Plan, 1999, states that air access is permitted to provide visitors an opportunity to view the wilderness area with no intervention other than the noise from the aircraft.

The number of landings sites inside the TWWHA available to private air operators is very limited for conservation reasons: to avoid disease introduction, and to avoid conflicts with bushwalkers, rafters and anglers who feel that their experience in the remote areas is affected by the sight or the noise of aircraft.

Some areas where noise from recreational craft requires management are Frenchman's Cap, Cradle Valley, Federation Peak, and the Central Plateau Conservation Area. For floatplanes specifically, the Lower Gordon River and Franklin River also require noise management. Aircraft operators are encouraged to apply noise reduction techniques and use aircrafts with technology to lessen noise.

Current designated landings strips for helicopters are located at Melaleuca, Moores Valley (south of Birchs Inlet) near Cradle Valley, Strathgordon, Strahan and Queenstown. Floatplane operators fly out of Hobart and Strahan, and are permitted to land at localities on Macquarie Harbour and the Gordon River, Lake St Clair and Bathurst Harbour/Port Davey. Other landings sites are only permitted for management, search and rescue purposes or related activities.

Encouraging and enabling greater use of floatplanes and helicopters into the TWWHA would provide a highly engaging and effective way for short-term visitors to Tasmania to experience the region. With amendments to the Management Plan, potential landing sites identified as priorities for helicopter touring in the HA include:

A site on the Overland Track – subject to application of management techniques to reduce interference with the walking experience;

- A site near the Walls of Jerusalem – to allow day access to this spectacular location;
- Fury Gorge – Australia's deepest gorge (west of Barn Bluff and Cradle Mountain), previously a permitted landing site;
- Great Pine Tier – over 5,000 tarns/lakes with the potential for touring and heli-fishing;
- A site along the South West track – to allow people to start the hike closer to Bathurst Harbour.

Case Study: Heli-Touring – Queenstown, New Zealand



Private half-day, full-day and overnight helicopter tours are offered from Queenstown to fly sightseers to multiple locations where guests can unwind, take in the natural beauty of various National Parks, and indulge in gourmet picnics and canapés for lunch or at sunset.

Most tours operate daily, with some by demand or bookings, and range from \$220-\$5945 per person.

Given the exclusivity of these tours, they are often directed for two people, and used to celebrate events such as proposals, honeymoons and anniversaries.

A variety of tour options exist to cater for various preferences including landings in remote locations, on top of the highest mountain peaks, and amongst hidden valleys and waterfalls, to highlight the diversity of the New Zealand landscape. Some tours can include up to four landings.

Heli-tours can also be combined with other activities such as climbing, nature walks, wildlife spotting and selected photo opportunity sites to make the experience more memorable.



Story Telling

Background

The Tasmanian World Heritage Wilderness is home to some amazing stories of nature and people, which help visitors to build a stronger connection to the place and provide them with something remarkable to share.

The human story of the TWWHA encompasses both give and take, as the environment has both resourced and challenged the first peoples, and the settlers. The Tasmanian Aborigines adapted to survive extreme climatic conditions and long periods of isolation from other communities, and then faced infection, persecution and centuries of conflict with new white settlers. Escaped convicts from Sarah Island resorted to cannibalism, lost in the dense West Coast wilderness; while the first West Coast Piners rowed through the Wild Rivers to harvest Huon Pine for shipbuilders, spending days in the wilderness, facing damp, lost food and equipment, rapids and floods. The hardy, isolated communities on the coast persevered through wild weather, and industrial bust and booms – first pinning, then mining, as well as the Hydro, fish farms, and tourism.

Across the Tasmanian Wilderness World Heritage Area, there are stories of loners, eccentrics, explorers and pioneers. Deny King was a tin miner and environmentalist who spent fifty years living in Melaleuca – Port Davey. Gustav 'Dorfer' Weindorfer's interest in botany led him to his 'Eldorado' at Cradle Mountain, where he started the first guest chalet (Waldheim) and promoted the concept of Cradle Mountain National Park; while James 'Philosopher' Smith, politician, goldminer and explorer, was the first canyoner at Cradle Mountain.

The World's Oldest Living Tree, and the world's oldest living plant – the King's Holly (*Lomatia tasmanica*); a haven for the Orange Bellied-Parrot; the tallest flowering plant species in the world (*Eucalyptus regnans*); continuation formation of karst and gorges; the race to save the Tasmanian Devil from its Facial Tumour Disease; numerous sub-species of wallaby, possum, rat and bandicoot, demonstrating the process of evolution; the natural process of recovery and rejuvenation following bushfires – these are just a few examples of the extraordinary natural stories that exist and occur each day in the Tasmanian Wilderness World Heritage Area.

However, the stories of the TWWHA, and the marketing and educational opportunities associated with those stories, are in many cases being missed or under-utilised. In particular, the stories and heritage of the Tasmanian Aboriginal



Deny King's home, Bathurst Harbour – Graham Freeman & Tourism Australia

community (both before and after British settlement), and the story of the Tasmanian/Australian/International Green movement emerging from the Lake Pedder and Franklin-Gordon conservation battles (and their ongoing social and political relevance) are largely absent, and often glaring omissions, from many visitors' experiences of the TWWHA.

Market Needs

Wilderness and heritage are continually strong motivators for travel to Tasmania, but these are broad concepts that can be applied to many levels and types of experiences across the state. The unique stories of the Tasmanian Wilderness World Heritage Area, in combination with the pre-existing resonance of wilderness among potential visitors, have the potential to provide more specific motivation to travel and engage in particular tourism experiences of the TWWHA and surrounding regional areas.

Greater use of the unique stories of the TWWHA in marketing Tasmania as a destination, and telling those stories well once visitors have arrived will be critically important in attracting a new generation of visitors to the Tasmanian Wilderness. Given Tasmania's high rates of repeat visitation, telling new stories in different ways also offer an important opportunity for visitors to return to the same places, and even the same experience providers, but still discover something new.

More than two-thirds of decisions about where to travel are influenced by 'word of mouth'²⁰ (67%) which now includes social media or 'word of mouse' (Tourism Australia research, 2013). A strong, clear, and consistent consumer messaging program, telling the stories of the TWWHA on the ground, pre-trip, and post-trip, will engage visitors, start conversations, help visitors to build a stronger connection to the place, and provide them with something remarkable to share with their networks.

The first iteration of Tourism Tasmania's Go Behind the Scenery campaign referenced one signature story of the Tasmanian Wilderness – the conservation movement's battle to protect the Franklin River from damming, that led to its World Heritage listing – however, the power of this story, and others remains underutilised...

20. Tourism Australia 2008, Australian Experiences Industry Toolkit, Volume 2, 'Boosting your bottomline'. Commonwealth of Australia, Sydney

Experience Seekers (Tourism Australia's target market) and Life Long Learners (Tourism Tasmania's target market) have a common interest in exploring and learning more about themselves and the world in which they live. They are knowledge hungry, seeking to discover and understand new people and places. The priority project of Story Telling is attuned to the needs of these markets, sharing and engaging these visitors in telling the unique stories of the TWWHA and immersing themselves in the places these stories come from.

Demand for Aboriginal Experiences

Responding to market needs and telling the unique stories of the Tasmanian Aboriginal community would also provide a point of difference for Tasmanian businesses in the Nature/Adventure and Indigenous Tourism markets.

The Tasmanian Aboriginal story is a key gap in the visitor experience of the Tasmanian Wilderness today, especially as the Tasmanian Wilderness Area would still be eligible for World Heritage listing under its cultural values even if none of the natural values existed. A Tourism Tasmania report from 2000 indicated a significant level of interest in past and contemporary Aboriginal culture from both international and interstate visitors to Tasmania, while Parks and Wildlife surveys showed a desire to learn more about Aboriginal heritage at Mt Field, Cradle Mountain, Lake St Clair, and Arthur-Pieman (Tarkine) in particular²¹.

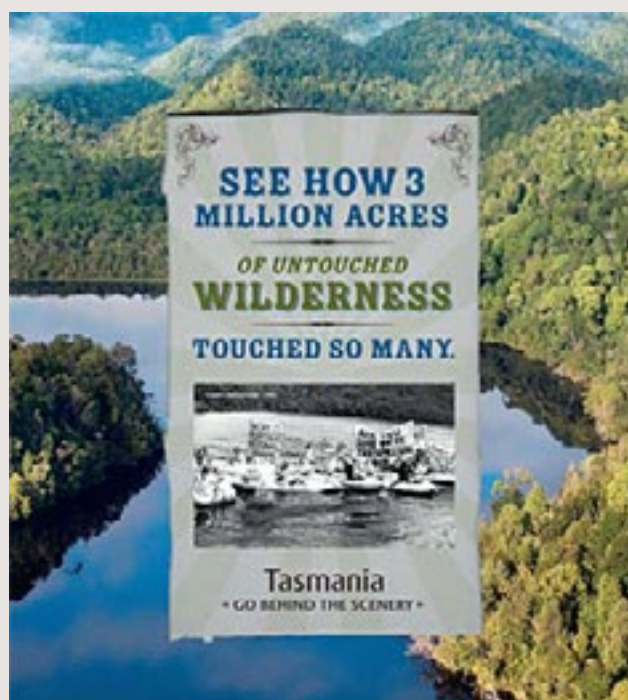


Figure 12: Print advertising from Tourism Tasmania's Go Behind the Scenery Campaign (Phase 1, 2013).
Source: Tourism Tasmania

Despite some decline in 2006-2010, international and domestic visitor spend on Indigenous Tourism in Australia (i.e. visit to an Aboriginal site or community; experiencing Aboriginal art/craft or cultural display; attending an Aboriginal cultural performance) reached \$3.8 billion in 2010; engaging 13% of international visitors, and 20% of international visitors nights²². Key growth markets for Indigenous Tourism experiences include Indonesia (10% increase), China (9.4%), India (6.1%), Thailand (5.6%) and France (5.4%). International visitors participating in Indigenous Tourism experiences were also more likely than other visitors to spend nights in regional areas.

Story Telling: Brand Development, Marketing and Experience Delivery

The underutilisation of the TWWHA's stories, in particular the Aboriginal and conservation stories, in the general visitor experience of the Tasmanian Wilderness – and opportunities to correct this – were identified through the Reimagining project.

There is a need for organisations such as Tourism Tasmania and Tasmania Parks and Wildlife Service to engage in telling the stories of the TWWHA as part of destination marketing efforts; as well as a need to improving the delivery of stories on the ground – through the provision of information and mentoring opportunities for tourism operators and guides. The Story Telling priority project will only be successful if the whole industry is engaged, reflecting on their own story telling and experience delivery capacities and capabilities.

The opportunity exists for the Tasmanian Government and the tourism industry to undertake a brand development program for the TWWHA; using effective communication methods and well-crafted copy to draw out and define the most shareable, 'signature stories' of the Tasmanian Wilderness for Tasmania's marketing efforts.

From the brand development work, a brand toolkit, brand workshops and mentoring opportunities for tourism operators and Parks and Wildlife staff can be produced to guide improved content and delivery of visitor experiences (including guided experiences and standing site interpretation), and individual marketing efforts.

In order to better tell the Aboriginal stories of the TWWHA through the visitor experience, it is essential that the Tasmanian Aboriginal community is engaged through the brand development and story-telling development program. From both supply and demand perspectives, authenticity and cultural sensitivity and depth and diversity in story telling are priorities. Research has found a perception among many domestic visitors that Indigenous Tourism in Australia is often clichéd, shallow and stereotyped, which deters interest in participating in future Indigenous Tourism experiences.²³ Tasmanian tourism operators have anecdotally reported that they find it difficult to find appropriate information for Aboriginal interpretation for use in a wide variety of tourism activities, and would like to consult with the Aboriginal community; however, they also find it difficult to identify which Aboriginal groups or individuals to consult and the most appropriate processes for culturally sensitive consultation.

21. Department of Premier and Cabinet 2007, *Aboriginal Tourism Development Plan for Tasmania*, Tasmanian Government, Hobart.

22. Ruhanen, Lisa; Whitford, Michelle & McLennan, Char-lee 2013, *Demand and Supply Issues in Indigenous Tourism: A Gap Analysis*, prepared for Indigenous Business Australia & Department of Resources, Energy and Tourism, Indigenous Tourism Working Group, Brisbane.

23. Ruhanen, Whitford & McLennan 2013, *Demand and Supply Issues in Indigenous Tourism: A Gap Analysis*

Story Telling: Policy and Planning Implications

The development of a clear brand and themes for the TWWHA will be critically important in future marketing of visitor experiences of the Tasmanian Wilderness. A clear brand and themes for the TWWHA will also greatly assist in engaging and aligning the tourism industry around common goals and consistent messages through the 'reimagining' process.

This Story Telling priority project should not face any legislative or serious policy hurdles; however, it will require the investment of organisational resources from lead Government agencies and the Tasmanian tourism industry, as well as shifts in organisational focus – in particular towards marketing and site interpretation from Tasmania Parks and Wildlife.

The story telling project will require an investment in a brand development program from the Tasmanian Government, through Tourism Tasmania and Tasmania Parks and Wildlife. This should also involve the development and implementation of a social media program to promote the brand and its signature stories, with the necessary staff resources to make it engaging and effective.

The Tasmanian Tourism Industry must take responsibility for encouraging operator support for the new TWWHA brand and signature stories; targeting the provision and take-up of formal and informal mentoring opportunities to where it is most needed, and making 'heroes' of those operators who take the opportunity to review and refresh their experience delivery. However, opportunities for Parks and Wildlife to incentivise improved experience delivery and brand alignment under the Story Telling project through the commercial licensing and leasing process (e.g. performance measurement conditions; guide training requirements for access to TWWHA lands) should also be considered.

It will also be important to collectively develop frameworks for supporting Aboriginal engagement in the brand development and story telling project. This may include a new roundtable for the Aboriginal community to work with Tasmania Parks and Wildlife and tourism operators to share Aboriginal heritage and culture for the brand project, mentoring operators and revamping site interpretation – as well as providing a forum to support tourism proposals from the Aboriginal community to go through the new Expression of Interest process. Greater engagement may result in the need for new policy outcomes, such as a community-managed accreditation or training program in Aboriginal culture and heritage for non-Aboriginal tourism operators, as foreshadowed in the Aboriginal Tourism Development Plan for Tasmania²⁴.

Story Telling: Enablers

Through engagement with industry, the following opportunities have been identified as strategic priorities to encourage and enable improved story telling for the Tasmanian Wilderness World Heritage Area:

- Formation of Aboriginal roundtable with Tasmania Parks and Wildlife, Tourism Tasmania, and tourism operators to collaborate on authentic and engaging storytelling and site interpretation
- Brand toolkit for industry, developed in partnership between Tasmania Parks and Wildlife and Tourism Tasmania
- Story-telling and experience development mentoring program for tourism operators
- Including a guide training program to reinforce the telling of stories (similar to that used in Kakadu and Uluru)
- Dedicated social media program from Tourism Tasmania and Tasmania Parks and Wildlife, with the necessary staff resources to craft an effective and engaging approach to the TWWHA


CASE STUDY: Gavin the Parrotfish

Seawalker Green Island is an underwater viewing experience that allows visitors the opportunity to get up close and personal with one of the world's seven natural wonders in a safe and low stress way. Located in the shallows of the 6,000 year-old coral cay of Green Island, visitors can try their hand at 'helmet diving' whereby they walk on the sea floor with an experienced guide and are completely surrounded by the colourful fish and coral of the Great Barrier Reef National Landscape.



Their targeted media campaign around Gavin, the 'photo-bombing' parrotfish, has gone global, with thousands of people seeing Gavin's photo on Facebook, as well as features on Buzzfeed, in the Huffington Post, the Daily Mail and more.

24. Department of Premier and Cabinet 2007, *Aboriginal Tourism Development Plan for Tasmania*,



Where to from here?

Enabling Investment

The Reimagining the Visitor Experience of the Tasmanian Wilderness World Heritage Area project has identified a number of opportunities to deliver “contemporary, wilderness experiences, offering shared, life changing moments.”

Through industry consultation, the six priority projects – the Cradle Mountain, Gordon River and World’s Oldest Tree Visitor Experiences, Wilderness Accommodation, Story Telling and Air Access – have been selected as major strategic areas for action by the Tasmanian tourism industry, the Tasmanian Government, and other stakeholders.

In addition, Appendices 1 and 2 provide a further breakdown of suggested actions and enablers for the tourism industry to deliver on the seven goals for the future of tourism in the wilderness.

The project has also identified a series of practical but significant policy reforms designed to improve investment confidence and encourage further tourism activity in Tasmania’s reserve system. The new Tasmanian Government has committed to arguably the most substantive reform agenda to the process for tourism engagement in the Parks and Reserve system of any State or Territory Government in Australia, and this is designed to position Tasmania as ‘open for business’ for tourism entrepreneurs, investors and operators.

It is important now that the Tasmanian tourism industry look to the next steps, which will be critical to enabling successful, private investment in the TWWHA; working towards the shared vision for a contemporary visitor experience of our World Heritage.



Key steps towards achieving the vision, already underway, include:

Parks 21

Tourism Industry Council Tasmania, on behalf of the Tasmanian tourism industry, and the Tasmania Parks & Wildlife Service, on behalf of the Tasmanian Government, have agreed to develop a new, mutually binding, joint strategic framework to facilitate sustainable tourism activity and enhance the visitor experience in Tasmania's National Parks and Reserves.

'Parks 21' will seek to identify shared priorities and strategic directions for PWS and the tourism industry around a number of key areas identified in this report, including: licensing and leasing arrangements, infrastructure funding priorities, operator performance standards and quality assurance, Aboriginal engagement, voluntourism, market research, and branding and marketing. Progress towards the goals of Parks 21 will be reviewed at regular intervals against a range of key performance indicators.

It is expected that Parks 21, in conjunction with this Ecotourism Investment Profile, will serve as an important guide and driver for continuing cooperation and collaboration between government and industry in progressing the opportunities identified by the Reimagining project.

This is the first time anywhere in Australia where the private tourism industry and the public Parks and Reserves management authority have agreed to develop a joint binding strategic agreement to progress a shared vision for tourism and visitation in National Parks & Reserves.

TWWHA Management Plan Review

A new TWWHA Management Plan should be in place by 2015. The Reimagining project process and this Ecotourism Profile are the tourism industry's major contribution to the Government's public consultation around the new TWWHA Management Plan.

Tourism Industry Council Tasmania and Cradle Coast Authority will continue to provide input into the new TWWHA Management Plan consultation process using the recommendations contained in this Ecotourism Investment Profile, in order to secure greater confidence and clarity for new tourism developments such as those identified in this report and appendices.

Cradle Mountain Master Plan

Tasmania Parks & Wildlife Service, Cradle Coast Authority and Tourism Industry Council Tasmania have agreed to undertake a review of the Cradle Valley Development Plan (2003) and contemporise the recommendations from the original plan in light of, and with additions from the Reimagining project, in order to expedite progress on redeveloping the Cradle Mountain visitor experience.

This is expected to include a review of the concept for a World Heritage Visitor Centre and Dove Lake Visitor Experience, incorporating opportunities for private infrastructure investment.

Tasmanian Environmental Leaders Program

In an Australian tourism first, the Tasmanian tourism industry has committed to substantially enhancing its sustainability practices through a whole of industry partnership with the global EarthCheck Environmental Certification Program.

Through the Tasmanian Environmental Leaders Program all Tasmanian tourism operators accredited under the Australian Tourism Accreditation Program (ATAP) with TICT, have been provided with free access to EarthCheck Evaluate until the end of 2015. Operators are encouraged to utilise the program to understand their economic, social and environmental impact; measure, compare and continually improve their performance against local and global best practice, and gain recognition for their sustainability efforts.

This initiative is proposed to advance Tasmania's reputation for environmentally and social responsible, low-impact nature tourism through an industry-wide commitment to recognised sustainability principles.

Aboriginal Tourism Product Engagement

With support from the Tasmanian Government, Tourism Industry Council Tasmania is seeking to engage the Tasmanian Aboriginal Community on practical strategies to enhance operator and visitor understanding of Tasmania's Aboriginal cultural heritage.

An innovative project, to be undertaken in early 2015, will see members of the Tasmanian Aboriginal community partner with the State's leading tourism operators to develop concepts for visitor interpretation, experiences and products engaging visitors in the stories and cultural practices of the Tasmanian Aborigines.

Through this partnership, the Tasmanian tourism industry will seek to actively support the development of a signature, Tasmanian Aboriginal tourism product – owned, managed and delivered by the community, within the State reserve system.

West Coast Experience Fund

In order to stimulate and facilitate the development of new visitor experiences on Tasmania's West Coast, RACT, as operators of Strahan Village, Gordon River Cruises and the Cradle Mountain Hotel, has offered \$250,000 in interest-free loans for tourism operators and entrepreneurs to develop new visitor experiences on the West Coast. It is hoped the Tasmanian or Australian Government will match this funding commitment to provide a \$500,000 stimulus package to support the development of innovative, new visitor experiences on the West Coast.

The Tasmanian Government's Expression of Interest Process

The Tasmanian Government has invited Expressions of Interest from investors with ideas for tourism experiences in the Tasmanian Wilderness World Heritage Area as well as National Parks and Reserves. The Government is looking for developments that broaden the range of experiences on offer, improve access for tourists, complemented by sensitive and appropriate tourism infrastructure, while maintaining the integrity of natural and cultural heritage.

Proposals received in the EOI process will be assessed through a confidential, two-stage process, and successful proponents will be granted exclusive license arrangements while they are establishing their proposal. The first round is closing on November 21 2014, and it is anticipated that the process will be open to Expressions of Interest in continuous six-monthly rounds.

The new Expression of Interest process presents a significant opportunity for private operators and investors to progress a number of key concepts identified in this report and appendices, as well as hopefully, completely new and original ideas to reimagine the visitor experience of our World Heritage areas.

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Figures & Tables

Figure 1: Tasmanian World Heritage Wilderness Area
Source: *Tasmanian Parks and Wildlife (2008)*

Figure 2: Tasmanian World Heritage Wilderness Area – Boundary Plan
Source: *Commonwealth of Australia, World Heritage Areas (2013)*

Figure 3: Median change in per capita visits to Protected Areas 2009-2013
Source: *Tourism Research Australia Tourism Profiles*

Figure 4: Growth in Demand for Difference Activities in Australia since 2008
Source: *Tourism Research Australia, National and International Visitor Survey*

Figure 5: Tasmania and the West Coast: 5 Year Visitor Trend (Year Ending June)
Source: *Tourism Tasmania, Tasmanian Visitor Survey 2009 & 2013*

Figure 6: Total Visitors – Cradle Mountain/Cradle Valley 2009-10 to 2012-13
Source: *Tourism Tasmania, Tasmanian Visitor Survey 2009-2013 'Total Tasmanian Attractions Visited or Stayed Overnight'*

Figure 7: Total Overnight Visitors – Cradle Mountain and Region

Source: *Tourism Tasmania, Tasmanian Visitor Survey 2009-2013 'Total Tasmanian Attractions Visited or Stayed Overnight'*

Figure 8: Visitor Participation in Charter Boat, Cruise or Ferry Ride activities (Australia)

Source: *Tourism Research Australia 2013, National and International Visitor Survey (Year Ending June)*

Figure 9: Visitor Participation in Charter Boat, Cruise or Ferry Ride activities (Tasmania)

Source: *Tourism Research Australia 2013, National and International Visitor Survey (Year Ending June)*

Figure 10: Number of Visitors and Nights Spent at Wilderness Lodge

Source: *Tourism Tasmania, Tasmanian Visitor Survey 2009-2013*

Figure 11: Potential precincts for wilderness accommodation

Figure 12: Print advertising from Tourism Tasmania's Go Behind the Scenery Campaign (Phase 1, 2013)

Source: *Tourism Tasmania*

Table 1: Top Five Overseas Markets for Tasmania since 2009 (Year Ending June)

Source: *Tourism Research Australia, National and International Visitor Survey*

Table 2: Estimated Costs of Cradle Mountain Visitor Experience

Expense items are informed estimates based on previous TRC and EC3 Global research and project experience.

Table 3: Estimated Benefits of Cradle Mountain Visitor Experience

Source: *The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).*

Table 4: Estimated Benefits of Gordon River Experience

Source: *The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).*

Table 5: Number of Nights Spent at Wilderness Lodge and selected other Accommodation types in Tasmania, 2010-11 – 2012-13

Source: *Tourism Tasmania, Tasmanian Visitor Survey 2010-2013*

Table 6: Identified Opportunity for Melaleuca

Source: *Cost estimates are based on previous project experience and online research, including consultation with AirTasmania during this project.*

Table 7: Benefits of Air Access to Melaleuca

Source: *The benefits are based on estimated additional visitor numbers, informed by market potential and visitor trends. The financial benefits of these additional visitors have been calculated using visitor profile data from Tourism Research Australia data for West Tasmania (June 2013).*

Appendix 1

Strategic Actions – Delivering on the Vision and Goals

Appendix 2 provides an overview of more specific actions that will be required in conjunction with the Priority Projects to deliver on the vision “to deliver the most contemporary wilderness World Heritage experience offering shared, life changing, moments”.

Strategic objectives, actions and enablers are identified under each of the seven goals for guiding the tourism industry and Tasmanian Government towards a reimagined visitor experience in the Tasmanian Wilderness World Heritage Area.

The seven goals are:

1. Making Our Customers Heroes;
2. Providing Personal, Hands-on Experiences;
3. Embracing the Tourism Conservation Partnership;
4. Bringing the Aboriginal Stories and Heritage to Life;
5. Giving Experience Providers Confidence in New Opportunities;
6. Delivering World’s Best Practice that is Measurable;
7. Embracing New Markets and Communication Channels.



Goal: Making Our Customers Heroes

Strategy

Responding to customer's needs, wants, expectations and desires is essential in forming an appealing holiday experience that caters to the requests of the clientele.

Actions responding to customer's needs include:

- Health and Well-being: building an 'Ashram in the wilderness' where visitors can appreciate the clean air, water, and ancient forests.
- Adventure Experiences: engaging the youth and schools markets with the landscape through a variety of adventure activities
- Luxury in the Wilderness: developing an iconic lodge in the TWWHA, or similar products that deliver an immersive but comfortable wilderness experience.
- Stories not Stuff: working with experts in storytelling, to bring out the conservation, indigenous, and industrial history of the TWWHA
- Ease of Access: upgrading key airports, and allowing a greater number of sites for helicopter and seaplane access, to enable visitors with shorter lengths of stay to enter the wilderness.
- Destinations: developing infrastructure plans for each of the key visitor nodes to deliver comprehensive, high standard visitor experiences of our iconic gateways to the wilderness.

Enablers

- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs.
- Improved public transport for Cradle Mountain and the Overland Track
- Undertake and utilise visitor research to better understand our customer's needs, wants, expectations and desires.
- Expression of Interest process to encourage the development of new and innovative experiences in and around the TWWHA

Priority Project

Mentoring program for existing businesses to improve experience delivery – listening to the customer and responding to their needs.

Goal: Providing Personal, Hands on Experiences

Strategy

Providing personal, hands on experiences are vital in attracting and engaging visitors, while promoting the environmental values and uniqueness of the region.

Opportunities to provide personal, hands on experiences include:

- Allowing 'access' to the World's Oldest Living Tree (the Mt Read Huon Pine)
- Sharing the stories of Tasmania's Aboriginal peoples; sharing the oldest living culture in a modern context
- Developing an up-close wildlife experience e.g. a Tasmanian Devil viewing platform and tour at Sloop Point (near Strahan)
- Providing unexpected moments, such as personalised food and wine experiences with strong local provenance
- Allowing improved access for helicopters and/or seaplanes to access secluded spots, including basic platform infrastructure
- Developing mountain bike trails between Cradle Mountain and Strahan (overnight)
- Developing short mountain bike trails at Cradle Mountain, Mt Field and in the Tarkine
- Enabling opportunities to pan for precious stones in areas with industrial mining heritage e.g. panning for sapphires at Adamsfield
- One-off wildlife experiences with overnight accommodation

Enablers

- Established codes of conduct for wildlife engagement in the TWWHA
- Aboriginal Engagement Framework: empowering the Tasmanian Aboriginal community to develop their own visitor experiences to tell their own stories; and helping existing operators to appropriately share the story of the oldest living culture.
- Expression of Interest process to encourage the development of new and innovative experiences in and around the TWWHA

Priority Project

Allowing improved access for helicopters and/or seaplanes to access secluded spots, including basic platform infrastructure – to deliver personal, hands on tours and experiences showcasing the wilderness, cultural history and wildlife of the TWWHA, and providing unexpected moments – such as local food and wine in places of exceptional natural beauty.



Goal: Embracing the Tourism-Conservation Partnership

Strategy

By embracing a tourism-conservation partnership, both aspects can be incorporate and promoted in the visitor experience of the TWWHA.

This can be achieved by:

- Bringing the conservation story to life, providing great story telling and interpretation in key visitor nodes and sites of special conservation significance
- Incorporating 'voluntourism' into more tourism activities and conference bids
- Delivering once-in-a-lifetime moments – opportunities for visitors to witness unique natural phenomenon e.g. overnight stays on Maatsuyker Island to see the Mutton Bird 'runway'
- Positioning the Tasmanian Wilderness as the premier conservation destination: demonstrating world's best practice in land management and conservation, including regulation of tourism activity (e.g. industry accreditation, performance measurement, and innovation in sustainability)
- Promoting the desirability of the Tasmanian Parks & Wildlife conservation volunteers program (5 year waiting list)

Enablers

- Create a framework for engaging Aboriginal people in tourism and park management
- Move to performance-based (measurable) criteria for tourism operator permits
- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs

Priority Project

Bringing the conservation story to life: accepting and embracing histories of conflict – including Aboriginal stories, and the political conservation movement – and engaging visitors hands-on in discovering the TWWHA's natural and cultural values with 'voluntourism' opportunities e.g. archaeological digs, flora and fauna surveys.

Goal: Bringing the Aboriginal Stories and Heritage to Life

Strategy

Tasmania's Aboriginal heritage is both nationally and internationally significant, gaining the Tasmanian Wilderness World Heritage Area cultural as well as natural endorsements. However, for most visitors to Tasmania and its wilderness, Aboriginal stories do not feature strongly in their experience.

Through active engagement and conversation with Aboriginal people and heritage, visitors can learn to better appreciate their connection to country and why this area is considered 'World Heritage' for its cultural values.

Actions required to bring this heritage to life include:

- A roundtable to engage: developing an aboriginal engagement framework with Tasmanian Parks and Wildlife for more regular engagement around new and existing tourism opportunities starting in the TWWHA, as well as other Tasmanian parks and reserves
- Story-telling: Engaging Aboriginal people in story-telling programs, particularly in social media, to begin sharing their heritage on their terms
- Indigenous Interpretation: Working with the Aboriginal community and Tasmanian Parks and Wildlife to review and revamp the interpretation of Aboriginal stories and heritage at important sites in the TWWHA
- Aboriginal Rangers: encourage Tasmanian Parks and Wildlife to continue its Aboriginal ranger employment program, and where possible to employ Aboriginal rangers in visitor engagement roles
- Conduct an audit of Aboriginal heritage sites as recommended by the UNESCO World Heritage Committee

Enablers

- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs.
- Partnership marketing with Aboriginal stories including social media (based on clear brand positioning)
- Ecotourism Policy for Tasmania (Parks 21)

Priority Project

A roundtable to engage: developing an Aboriginal engagement framework with Tasmanian Parks and Wildlife for more regular engagement around new and existing tourism opportunities starting in the TWWHA, as well as other Tasmanian parks and reserves

Goal: Giving Experience Providers Certainty for New Opportunities

Strategy

Actions that provide certainty of new opportunities are essential in attracting increased investment in new and innovative products, and the revitalisation of existing tourism experiences in the TWWHA.

Actions to support certainty for experience providers to seize new opportunities include:

- Establishing an open Expression of Interest process for sole source tenders to develop new tourism experiences in the TWWHA, protecting investor intellectual property
- Opening access to new areas of the TWWHA to tourism opportunities by adjustments to zoning in the TWWHA Management Plan; allowing sensitive developments to occur in areas of appropriate environmental carrying capacity
- Ensuring security of tenure and offering exclusivity where appropriate to increase the viability of new product and investments
- Increasing access to new and existing tourism experiences in the TWWHA by improving air access
- Shifting the messaging to increase awareness and certainty of eco-tourism opportunities
- A focus on what is permitted, not what is not
- Recognition of new technologies and tourism activities to contemporise zoning for tourism as a possible use in more areas of the TWWHA under the new Management Plan
- Promotion of ideas, opportunities, and availability of exclusive access areas
- Detailed performance measurement and performance clauses in lease and license contracts to mandate best practice for tourism developments and activity in the TWWHA
- Creating a cultural shift among Tasmanian Parks and Wildlife staff to promote tourism operators as partners in managing visitor experiences and conservation in National Parks and reserves

Enablers

- Ecotourism Policy for Tasmania (Parks Tourism Strategy)
- Collaborative review of the TWWHA Management Plan to embrace and provide for future tourism-conservation partnership opportunities
- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs.

Priority Project

Undertake a regular 'open EOI' process to encourage the best ideas for new experiences to be put forward, and ensure the protection of investor intellectual property. Modelled on the approach used for such a process in Queensland, this needs to be supported with: a review of the TWWHA Management Plan and the zoning system; the use of accreditation and other performance standards; time limits for project actions for both government and proponents (two-way certainty); a review of the latent permit issue; a lifting of standards for tourism operations – with Guidelines for Best Practice linked to carrying capacities; and development of KPIs with measurable outputs for new leases and licenses.

Goal: Delivering World's Best Practice that is Measurable

Strategy

The competitive strengths of the Tasmanian Wilderness as a destination can only be improved by ensuring a reputation for quality experiences and environmental sustainability. In order for new practices to be credible examples of best practice, performance needs to be measurable.

Measures to establish measurable best practice include:

- Continuing to mandate Australian Tourism Accreditation as a requirement for commercial operations in National Parks and reserves
- Encouraging take up of additional ecotourism accreditations or assessments that measure performance as conditions of lease and license agreements
- Establishing clear principles and certification for what constitutes ecologically sustainable development and world's leading practice in low impact design for new buildings and other infrastructure in the TWWHA
- Creating a wilderness experiences fund to support the development of new adventure and luxury experiences, supporting operators to achieve best practice

Enablers

- Ecotourism Policy for Tasmania (Parks 21)
- Undertake and utilise visitor research to better understand our customer's needs, wants, expectations and desires.
- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs.

Priority Project

Create a wilderness experiences fund to support the development of new adventure and luxury experiences, supporting operators to achieve best practice. Operator agreements to achieve measurable best practice will encourage greater acceptance of key potential developments including; accommodation on the Gordon River; multi-day walk at the Walls of Jerusalem; innovation of Cradle Mountain shuttle bus service.

Goal: Embracing New Markets and Communication Channels

Strategy

Better leveraging the tourism potential of the TWWHA will require embracing new market and communication channels, and the development of a strategic, unified brand for the Tasmanian wilderness to increase awareness and conversion into visitation.

Branding and marketing initiatives required for the TWWHA include:

- Providing a brand blueprint to guide policy and land-use
- Story-telling that is linked to a comprehensive brand strategy
- Driving the experience delivery mentoring program for operators
- Linking stories with extraordinary hands-on experiences
- Telling stories in the context of people and place
- Proactive events attraction strategy to support events driven activities and increased visitation e.g. music in the wilderness
- Embracing 'swarming', and leveraging 'tribes' through public relations and social media
- Announcing surprising outcomes e.g. 'access' to the World's Oldest Tree, an 'Ashram in the Wilderness', a reserve for the future release of the Thylacine

Enablers

- Ecotourism Policy for Tasmania (Parks 21)
- Undertake and utilise visitor research to better understand our customer's needs, wants, expectations and desires.
- Mentoring program for existing businesses to improve experience delivery – story telling; listening to the customer and responding to their needs.
- Partnership marketing with Aboriginal stories including social media (based on clear brand positioning)
- Expression of Interest process to encourage the development of new and innovative experiences in and around the TWWHA

Priority Project

Invest in a major social media program built around new experience in the TWWHA and the stories that they tell. For this to be successful, the TWWHA brand and its link to the Tasmanian brand must first be clarified e.g. 'sharing Australia's most significant wilderness'.

Appendix 2

Opportunities by Precinct

Appendix 2 provides a brief introduction to six key 'precincts' of the Tasmanian Wilderness World Heritage Area (including the Tarkine) explored during the Reimagining the Visitor Experience of the TWWHA project. Opportunities identified by the Concept Design Group and industry consultation are listed for each precinct, along with the key existing tourism operations for each precinct.

The broad precinct areas are:

- Recherche Bay and the South Coast;
- Melaleuca-Port Davey;
- Lake Pedder and Gordon, and Mt Field;
- Strahan, Macquarie Harbour and the Gordon River;
- The Tarkine;
- Cradle Mountain-Lake St Clair and the Walls of Jerusalem.

Given the size and diversity of the Tasmanian Wilderness World Heritage Area, it was not possible to cover all precincts and areas during the Reimagining project. However, a number of concepts and strategies listed throughout this Ecotourism Investment Profile will be applicable and should be considered in conjunction with other precincts and areas such as the Central Plateau, Liffey Falls, Mole Creek Karst, and the Hartz Mountains.

Recherche Bay & South Coast

Precinct Description

The South Coast comprises 600,000 hectares of remote wilderness, untouched beaches, pristine mountains and rivers. The area is home to the 85km South Coast Track that runs between Cockle Creek and Melaleuca.

Recherche Bay is listed as a National Heritage site, as its coastal setting corresponds with that described by the French expedition that arrived to Australia between 1792 and 1793. The area represents the first encounter between the French and Tasmanian Aboriginal people, and the site where scientific experiments and observations were carried out. Recherche Bay can only be reached by air or sea, with no hiking trails.

Opportunities

- Improvements and careful branding (track/trail not 'walking') of the South Coast Track to attract more of the adventure walking market.
- Development of South Coast Track halfway point standing camp with air access at Prion Bay
- Wilderness lodge development at Recherche Bay
- Overnight stays on Maatsuyker Island – particularly for once in a lifetime opportunities to view the "Muttonbird Runway" phenomenon

Key Existing Operators

- Par Avion Wilderness Tours
- Tasmanian Air Adventures
- Parks and Wildlife Service / South Coast Track
- Parks and Wildlife Service / Conservation Volunteers Program



Melaleuca & Port Davey

Precinct Description

Melaleuca - Port Davey, located in the far South West, is among the most remote regions of Tasmania's wilderness. The area attracts visitors for its beauty, isolation, history and hiking opportunities. Two hiking trails meet here: the South Coast Track from Cockle Creek, and the Port Davey Track from Lake Pedder.

The site possesses important world heritage and human use values. It is a key breeding zone for the endangered orange-bellied parrot and a habitat for unique marine species, with significant natural diversity. The area is a prime example of an Aboriginal cultural landscape, and also has strong links to Western habitation in Tasmania through tin mining, fishing, pining, whaling sites.

The number of visitors to Melaleuca and Port Davey is relatively low, as the area is only accessible by one-hour flights from Hobart, or multi-day journeys on sea or foot. The majority of visitors come on day-trips as part of a scenic flight package, and the majority of others are undertaking the South Coast Track. Limited accommodation is available in a walker's hut, and Par Avion's luxury tent Wilderness camp.



Opportunities

- Increased light aircraft accessibility and facilities to support growth: runway upgrade, general storage, toilets, fuel storage
- Float plane access to more sites in Bathurst Harbour
- Development of South Coast Track 'base camp'
- Cruise line access and touring points
- Review of walking track experience, interpretation and education
- Mentoring of existing businesses to develop clear, unique selling point for the area

Key Existing Operators

- Par Avion Wilderness Tours
- Tasmanian Air Adventures
- Roaring 40s Kayaking
- Orion Expedition Cruises
- Parks and Wildlife Service / South Coast Track
- Parks and Wildlife Service / Conservation Volunteers Program



Lake Pedder, Lake Gordon and Mt Field

Precinct Description

Lake Pedder and Lake Gordon together constitute Australia's largest inland freshwater lake, accounting for almost 1% of Tasmania's total area within the Southwest National Park.

Lake Pedder was a smaller natural lake with a distinctive pink quartzite beach and home to rare species of fauna, protected from 1955 within Lake Pedder National Park. However, in 1967 the Tasmanian Government revoked Pedder's National Park status and in 1972, Lake Pedder was flooded as part of the Tasmanian hydro-electric scheme expansion – despite significant opposition from the Australian Government and environmental movements. The failed campaign to save Lake Pedder fed into the later successful battle to save the Franklin from damming, and also resulted in the formation of the United Tasmania Group (recognised as the world's first green party).

The Lake Pedder and Gordon area is home to some of the State's best trout fishing and both lakes have boat facilities, making them a drawcard for keen anglers. The highest commercial abseiling experience in the world is conducted at Strathgordon, descending the Gordon Dam wall. Strathgordon also has several walking trails to explore the wilderness surrounding the lakes. The drive into Strathgordon along Gordon River Road is considered a highlight of the area, with expansive views over mountain ranges, scrub and moorland.

Mt Field is Tasmania's oldest National Park and a recent addition to the Tasmanian Wilderness World Heritage Area. Mount Field contains a remarkable diversity of environments, geology and wildlife within a relatively small area; from tall swamp gum forest to rainforest, alpine areas, and massive tree fern colonies. The majority of visitors to Mt Field take the short rainforest walk to Russell Falls, while others come to visit Lake Dobson and the alpine tarn areas for hiking and cross country skiing.

Opportunities

- Adventure hub for backpackers and education/school groups
- School camp/outdoor education facility
- Re-opening of Hydro station tours
- Cantilever walkway from old Visitor Centre to the Gordon Dam wall
- Glass walkway around the Gordon Dam wall
- Ziplines or via ferrata
- Mountain lookout to view the Frankland range over little lake
- 'Wilderness Challenge' event – Strathgordon to Strahan with mountain bike, kayak, run and swim legs.
- Wilderness Accommodation at Adamsfield (remote former osmiridium mining settlement near Lake Gordon)
- Mountain biking trails at Mt Field
- Chairlift transport/experience through different environments at Mt Field (in conjunction with existing ski tows)

Key Existing Operators

- Lake Pedder Chalet
- Aardvark Adventures (abseiling Gordon Dam wall)
- Tasmanian Air Adventures (seaplanes)
- Tassie Bound (kayaking)
- Wild Bike Tours (mountain biking Saw Back Range/Adamsfield)
- Hydro Tasmania (power station and land manager – not currently running tours)



Strahan, Macquarie Harbour & the Gordon

Precinct Description

Strahan is a village on the shores of Macquarie Harbour on the central West Coast, known for its convict history and modern fish farming. Nearby in Macquarie Harbour, is Sarah Island, where Tasmania's oldest convict settlement is located. The most severe convicts were punished on Sarah Island, but also the island gained reputation for its pinning and shipbuilding trade.

Strahan is also a key gateway to the TWWHA, through the Wild Rivers National Park. The Wild Rivers is home to spectacular mountain peaks, dense forest, gorges and world-famous rivers the Franklin and the Gordon. Strahan, the Franklin and the Gordon were the sites of intense political conflicts between environmentalists and the Tasmanian Government's Hydro-electric scheme expansion in the 1980s, resulting in a landmark High Court battle between the State and the Federal Government, and impetus for the international Green movement. Tourism activities include hiking, rafting, canoeing, visiting waterfalls and historic aboriginal and convicts sites.



Opportunities

- Luxury overnight cruise and accommodation on the Gordon (8-10 berth)
- Helicopter landing platforms (Low Rocky Point, Franklin Range, Tarkine, Gordon River)
- Wildlife experiences at Sloop Point (seal colony, Tasmanian Devils)
- Redevelopment of Heritage Landing (cruise stop on Gordon River) for quiet and uncrowded reflection in the wilderness (like Cathedral Fig, Queensland)
- Floating accommodation at East or West Pillinger (abandoned towns on Macquarie Harbour, south of Strahan)
- Mountain bike track from Strahan to Low Rocky Point, with overnight camps
- Gordon River 'piner punt experience'
- International 'Marine Biofuel Challenge' on Macquarie Harbour
- World Heritage Gateway Centre in Strahan
- Water screen with historic images of the Franklin/Gordon
- Improvements to standing interpretation and signage on Sarah Island
- Expanded regional opportunities for Conservation Volunteers Program

Key Existing Operators

- Gordon River Cruises
- World Heritage Cruises
- Strahan Seaplanes and Helicopters
- Tasmanian Air Adventures
- West Coast Yacht Charters
- Round Earth Company
- Strahan Village (RACT Destinations)
- Jet Boats
- Number of small accommodation providers

The Tarkine

Precinct Description

The Tarkine is Tasmania's largest unprotected wilderness area, comprising 477,000 hectares of north-west Tasmania. Sitting outside, to the north of the TWWHA, the area is home to Australia's largest, and the world's second largest temperate rainforest. The Tarkine is encompasses some of the richest sites of Aboriginal heritage in Australia, and holds over 50 threatened or endangered species of flora and fauna, some of which are endemic, prehistoric species.

The Tarkine provides for a great variety of nature-based activities. The Tarkine contains Tasmania's highest density of wild rivers, over 40 hiking trails, some of which are very remote, and unique cave systems. The Tarkine has the potential to deliver a significant annual tourism contribution and create new jobs for the North West.



Opportunities

- 'Access' to the World's Oldest Living Tree
- Multi-day guided kayaking/rafting experiences and/or 'Tarkine Challenge' event
- Aboriginal cultural experiences
- Wellness and health eco-spa
- 5 day/4 night Tarkine Walk (feasibility undertaken for World Wildlife Fund in 2004)
- 6-8 day traverse Trans-Tarkine Track: through ancient Red Myrtle forests; adventure into magnesite caves; big wave surf; wild-river kayaking; mountain biking on old mining tracks; wildlife tours based giant crayfish, Tasmanian devil
- Scenic flights
- 'Future Thylacine release area'

Key Existing Operators

- Corinna Wilderness Experience
- Hay's Adventure Tours
- Tarkine Wilderness Lodge
- Tall Timbers Adventure Tours
- Tarkine Forest Adventures (Dismal Swamp)
- A R Reflections River Cruises (Arthur River)
- Tarkine Trails
- Tasmanian Expeditions

Cradle Mountain – Lake St Clair & Walls of Jerusalem

Precinct Description

Cradle Mountain is one of Tasmania's premier wilderness regions and one of Australia's iconic tourism destinations. The Cradle Mountain precinct is for many visitors either their main experience of the Tasmanian Wilderness or an aspirational destination, accessed by approximately 160,000 visitors per annum (TVS 2013).

Its main strength is nature based tourism and it is internationally recognised as a walking destination. Walking, sightseeing, having a picnic or viewing wildlife are the most common activities undertaken in this part of the TWWHA.

The Cradle Valley is the beginning of the Overland Track, a six day walk travelling 65 kilometres through the heart of the Tasmanian Wilderness World Heritage Area. Dove Lake is the foremost attraction for day and overnight visitors, who visit the Dove Lake foreshore and might undertake the three-hour Dove Lake circuit, Marion's Lookout walk, or other short walks.

Lake St. Clair is located at the southern end of Cradle-Mountain St. Clair National Park within the TWWHA. Lake St. Clair is the deepest freshwater lake in Australia, at 167m, carved out by glacial ice during the last 3 million years. Spectacular mountain peaks surround the lake, covered by snow for much of the year. Lake St. Clair is known for good walking trails, ranging from leisurely strolls to day and overnight bushwalks; Lake St. Clair is also the end point for the Overland Track from Cradle Mountain. Lake St. Clair National Park features basic facilities such as BBQ and picnic areas, Visitor Information Centre, small shop and café. Camp and cabin accommodation is available at Lake St. Clair, and a wilderness lodge is soon to open in the old Hydro-industrial buildings at Pumpphouse Point.

The Walls of Jerusalem National Park is an alpine wilderness, featuring dolerite peaks, lakes, and alpine vegetation within the TWWHA. It is currently extremely remote for the majority of visitors, only accessible via walking tracks. The area is exposed to the extremes of Tasmania's changeable weather and there are no casual visitor facilities – bushwalkers must be experienced and full self-sufficient. The Walls of Jerusalem provide a remote, pristine and inspirational destination for adventurous visitors.

Opportunities

- Cradle Mountain World Heritage Centre
- Cradle Mountain 'gateway' – entry statement, sense of arrival, moment of significance
- Mountain bike opportunities
- Cradle Mountain overnight walk with standing camp/wilderness lodge
- 'Great Walk' standard experience in the Walls of Jerusalem
- Public-private partnership to develop base camp and tent platform facilities in the Walls of Jerusalem
- Increased accommodation capacity in Cradle Valley
- Improved day-use facilities, short walks and interpretation at Cynthia Bay (Lake St Clair)
- Expanded flight-seeing opportunities
- Increased capacity and greater experiential element for Cradle Mountain shuttle bus service

Key Existing Operators

- Number of wilderness cabin and lodge accommodation providers in Cradle Valley and surrounds
- Number of guided walking tour companies
- Cradle Mountain Huts Walk
- Parks and Wildlife Service – Overland Track
- Cradle Mountain Helicopters
- Cradle Mountain Canyons
- Devils @ Cradle
- Lake St. Clair Lodge
- Lake St. Clair Ferry
- Parks and Wildlife Service – visitor facilities and interpretation



