

**MARIA ISLAND**

**ECOTOURISM DEVELOPMENT**

**FEASIBILITY STUDY**

*Community Summary Report*

PREPARED BY:





*Photo courtesy of Michelle Ennis*

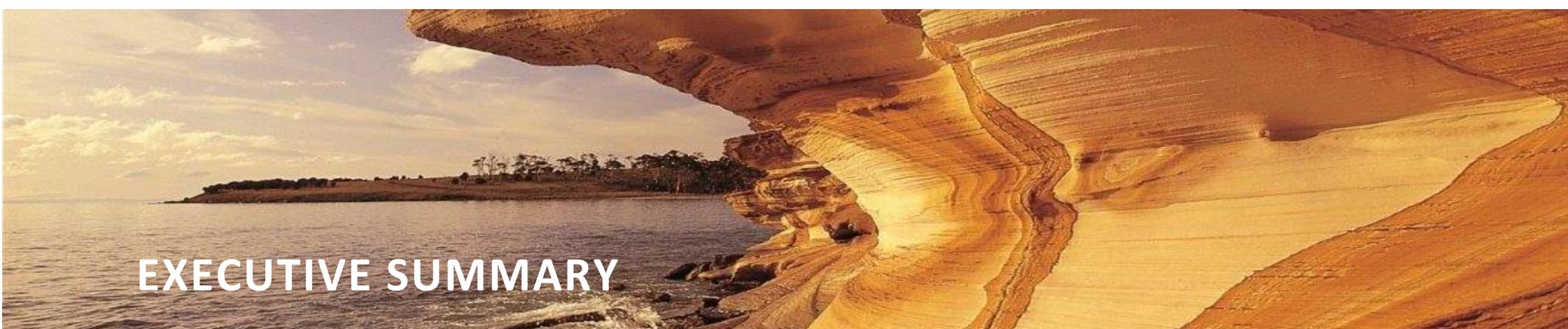
## Acknowledgement

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Photos provided by TRC Tourism, Tasmanian Parks and Wildlife Service and Michelle Ennis.



**Maria Island**  
NATIONAL PARK



# EXECUTIVE SUMMARY

The Australian and Tasmanian Governments recognise the potential for Maria Island to enhance the regions' tourism competitiveness and assist with industry diversification for communities located on the East Coast impacted by the recent decline in the forest industry.

The down turn in the timber industry combined with concerns for the long-term economic viability of the community have been the catalysts for recent intervention by the Tasmanian and Australian Governments as part of the Tasmanian Forests Intergovernmental Agreement. Both Governments recognise the potential for Maria Island to enhance the regions' tourism competitiveness and have agreed to invest \$1.6 million to upgrade the Maria Island jetty and complete an Ecotourism Development Feasibility Study for Maria Island.

For Maria Island to develop as a successful nature-based and heritage tourism destination gaps in access, accommodation and infrastructure must be addressed and the current product offer transformed into experiences that appeal to a broader range of markets.

The Maria Island Ecotourism Development Feasibility Study identifies priority actions which will support ecotourism tourism growth. It is directed towards renewing focus on the island, assisting the region strengthen its appeal to visitors and clearly differentiating it from its competitors.

The priority actions will act as investment catalysts for tourism growth to Maria Island and the region. It is anticipated that public sector investment in these projects would facilitate the development of strong private sector investment. A visitor growth target of 30,000 visitors over six to ten years is considered achievable for Maria Island if these actions are undertaken.

The highest priority projects are:

1. Establish a high quality and affordable 'fit for purpose' ferry service run exclusively by one experienced operator. This is the most crucial action needed for visitor growth. An affordable and consistent high quality passenger and freight service will determine the long term viability of Maria Island as an ecotourism destination
2. Position Maria Island as a 'must do' destination for target markets through an integrated marketing strategy that is linked to the East Coast Tourism brand positioning currently under development and the new Brand Tasmania
3. Create immersive experiences that deliver on the brand and appeal to target markets and provide food and beverage services that are linked to local providers
4. Upgrade service infrastructure to ensure basic services such as water, sewage and power are adequate, access is available for people with limited mobility, and interpretation and signage are improved.
5. Create additional accommodation options in the form of heritage accommodation and semi-permanent standing camps.

By implementing the recommendations in the Maria Island Ecotourism Development Study, the Tasmanian and Australian Governments will enhance opportunities for tourism growth to the East Coast and demonstrate its commitment as a key partner in assisting the development of a prosperous tourism industry for the local and regional economies.

## About Maria Island

Maria Island National Park is nature's true masterpiece. Separated from the mainland by the Mercury Passage, the island is home to unique wildlife, and is a refuge for plant and animal species that are under threat elsewhere. Wildlife is abundant and includes Cape Barren Geese, tall forester kangaroos, wombats, pademelons and wallabies. The island is important for the survival of the Tasmanian Devil and is a key location for the Save the Tasmanian Devil Translocation Project.

The endangered forty-spotted pardalote is a famous local bird found in good numbers, along with the white gum (*Eucalyptus viminalis*) that is essential to its survival. Maria Island is one of the few areas that remain unaffected by the root rot fungus *Phytophthora cinnamomi*, which is a serious threat to native plants in other parts of Tasmania.

Some of the waters around Maria Island are reserved as part of the Maria Island Marine Nature Reserve which is an area of captivating natural beauty.

The story of Australia's convict history continues to unfold on the island at Darlington which is the most representative and intact example of a probation station in Australia. The World Heritage Site's 14 convict buildings and ruins are preserved in a layout that reflects the original features of the probation system in Van Diemen's Land.

The layers of history provide a microcosm of Tasmania's story, including use by the Oyster Bay Aborigines, early European exploration, convict settlement, cement production, whaling, fishing, vineyards, hotel, silk production, agriculture, and more recently conservation as a national park. Each phase of history has left impacts on the island's landscape and heritage. Structures and infrastructure have been erected, altered, re-used and demolished in each phase of settlement, leaving a complex but intriguing legacy.



“It is a distinctive place where layered historic heritage lies amongst accessible bush, pristine beaches and wildlife “

## Maria Island and Ecotourism

Around 12,500 visitors visit Maria Island each year and participate in a range of activities including sightseeing, photography, wildlife viewing, walking, bike riding, swimming and camping. Visitors like to explore historic buildings and ruins at Darlington, as well as natural areas such as the Fossil Cliffs and Painted Cliffs.

There are a variety of walks that showcase Maria Island's natural features and cultural heritage, varying in duration from ten minutes to overnight. Established walks include the Darlington Township Walk; the Reservoir Circuit (1.5 hours return); Fossil Cliffs (2 hours return); Painted Cliffs (2 hours return); and Bishop and Clerk (4 hours return). More extensive options include walks to Mt Maria or South Maria Island. The absence of vehicles also makes Maria Island a popular place for mountain biking.

Boat and marine activities are popular, such as fishing and swimming particularly for visitors camping at Encampment Cove. No formal boat facilities are provided. Existing boating locations include Trigonion Corner, Whalers Cove, Haunted Bay, Booming Bay, Return Point and Four Mile Beach. Visitors can snorkel and scuba dive in the marine reserve to experience the plentiful marine life.

The Troy D wreck in the Mercury Passage provides opportunities for scuba diving. An initiative of the Orford Triabunna Chamber of Commerce, the wreck was scuttled four kilometres south-west from the northern tip of Maria Island in 2007 to form the East Coast Artificial Reef and Dive Site.

Visitors are required to be entirely self-sufficient for food and rubbish disposal. Basic services and infrastructure provided include visitor information, toilets, showers, gas barbeques and shelter, potable water, campers' kitchens and some interpretation and signage. Accommodation options on the island include camping at various locations (Darlington, Encampment Cove and French's Farm) and bunkhouse style accommodation at the Penitentiary at Darlington.

Existing charges for visitors include \$12 per person for a daily park entry pass (or \$30 per person for a holiday pass for up to 8 weeks), ferry fare and camping and accommodation fees for visitors staying overnight in the Darlington precinct.

Maria Island is part of the wider Tasmanian East Coast visitor destination, incorporating coastal communities, local produce, pristine white beaches, and cultural and wilderness experiences. The region also includes Wineglass Bay, (part of the Freycinet National Park) which has been named as one of the world's

top ten beaches. Maria Island offers travellers to the east coast a chance to be enriched by history and natural wonders in an outstanding setting.

The townships of Triabunna and Orford are located approximately 80km from Hobart on the East Coast touring route promoted by Tourism Tasmania which attracts over 200,000 visitors per annum. Visitation and overnight stays in the area have decreased in recent years. The area is falling behind the broader East Coast region in its ability to capture visitors to the state.

The importance of tourism to these local communities cannot be overstated. The closure of the Triabunna woodchip mill, combined with a general down-turn in the forest industry, have had and will continue to have significant implications for local employment and the economic viability of communities in the region.

In order to enhance the regions' tourism competitiveness and address the long-term economic viability of communities, the Tasmanian and Australian Governments funded the Maria Island Ecotourism Development Feasibility Study as part of the Tasmanian Forests Intergovernmental Agreement (IGA).

The Maria Island Ecotourism Development Feasibility Study identifies the priority actions which will support ecotourism tourism growth. It is anticipated that it will renew focus on the island, assist the region strengthen its appeal to visitors and clearly differentiate it from its competitors.

### Objectives

**Revitalise Maria Island so that it becomes a 'must do' visitor destination by providing for a range of tourism related products that:**

- **appeal to target markets**
- **allow for the private sector to service these markets and better use existing assets;**
- **protect and respect the island's values**
- **contribute to the operational costs of management of the island; and**
- **offer socio-economic benefits to the broader region.**

## Developing the Maria Island Ecotourism Development Feasibility Study

Identifying the island's values and 'must do' world class experiences and aligning these experiences with the wants and needs of the target market has been the first major step in developing the study. This has been done through consultation with stakeholders and a survey of visitors.

The study also brings together the recommendations and projects from existing strategies and aligns these with the 'must do' experiences identified, with the region's target markets and with the experience offerings of competitors. The key experiences, competitive strengths, gaps and opportunities have been considered through the document and strategies have been developed to align with visitor expectations.



## Visitor growth

### Target markets

The appeal of nature and heritage - based tourism is strongest for 'Experience Seeker' and special interest markets compared with traditional visitors of the region. There is also a large potential market of short-break visitors who are also accessible – they can be easily reached and leveraged to visit the island.

Research has shown that the 'Experience Seeker' has a number of key 'wants' to satisfy their travel experience, these include:

- Authentic personal experiences
- Social interactions, including meeting and interacting with the locals
- Experiencing something different from their normal day-to-day life
- Understanding and learning about different lifestyles and cultures
- Participating in the lifestyle and experiencing it, rather than observing it
- Challenging themselves – physically, emotionally and/or mentally
- Visiting authentic destinations that are not necessarily part of the tourist route
- Exposure to unique and compelling experiences

The markets with greatest potential for tourism growth are:

- Domestic visitors who align with Tourism Tasmania's life-long learners and Tourism Australia's 'Experience Seeker' markets
- Domestic intrastate visitors composed of a number of sub groups interested in nature and heritage-based activities and with high capacity and propensity to undertake repeat visits (for example, school groups).

The international 'Experience Seeker' market is an emerging market with some low growth expected.

### East Coast destination context

In 2011/12 the East Coast tourism region received 554,000 comprised of 289,000 (52%) domestic overnight visitors, 237,000 (43%) domestic day trippers (mostly Tasmanian residents) and 28,000 (5%) international visitors (The Stafford Group, 2013). While visitation declined in the 10 years to 2012, the years 2009 to 2012 show a 1% increase in intrastate overnight visitors – who are a major source market for the region and Maria Island. Intrastate visitors stay an average of 3 nights in the region.

The recent East Coast Destination Management Plan (The Stafford Group, 2013) proposes improvements in infrastructure, accommodation, activity products and packaging, walking and cycling trails, marketing and promotion to encourage more visitors to the region. Implementation of these improvements is envisaged as resulting in between 1.5% and 5% growth per year in East Coast visitation by interstate and international visitors.

There is potential for Maria Island to leverage off these proposed improvements which include development of Triabunna as a visitor node servicing a Maria Island tourism hub, and a marina development that could stimulate visitation and retail, service and accommodation facilities in the town.

There are also potential synergies between Maria Island and East Coast target visitor markets. The proposed East Coast target markets of short break interstate visitors, day trippers from Hobart, nature-based visitors, fishers, bird watchers and conference tours from Hobart are likely to be compatible with the types of experiences proposed for Maria Island in this report.

## Growth targets

The following growth targets are considered achievable for Maria Island subject to the priority actions in this report being undertaken. Maria Island visitor targets start at 12,000 visitors in Year 1 of implementation and grow to 30,000 visitors by Year 6. It is envisaged that 80% of visitors will be day trippers who stay elsewhere in the region or visit from a centre such as Hobart.

Growth potential will also be improved with implementation of the ECDMP proposals relevant to Triabunna and the surrounding area. [

### Maria Island Tourism Growth Targets

Year	Total visitors
1	12,000
2	15,000
3	17,000
4	20,000
5	25,000
6	30,000



## Inspiring travel to Maria Island: A strategy for optimising growth

For Maria Island to develop as a successful nature-based and heritage tourism destination gaps in access, accommodation and infrastructure must be addressed and the current product offer (activities and attractions) transformed into a suite of experiences that are packaged in order to appeal to a broader range of markets.

Feedback from visitors and stakeholders about what needs to be improved on the island to make the Maria Island experience more enjoyable and competitive with other destinations are consistent with these findings.

Improvements are required in:

- Capacity, frequency and service of the current ferry operation
- Bookings and transfer of luggage
- Marketing and promotion
- Experiences that appeal to a range of market including the education market
- Accommodation options
- Food and beverage supplies
- Interpretation and signage
- Infrastructure – water, power, amenities.

### Priority Actions

1. Establish a high quality and affordable ‘fit for purpose’ ferry service run exclusively by one experienced operator.
2. Position Maria Island as a ‘must do’ destination for target markets through an integrated marketing strategy that is linked to the East Coast Tourism brand positioning currently under development and the new Brand Tasmania
3. Create immersive experiences that deliver on the brand and appeal to target markets and provide food and beverage services that are linked to local providers
4. Upgrade service infrastructure to ensure basic services such as water, sewage and power are adequate, access is available for people with limited mobility, and interpretation and signage are improved.
5. Create additional accommodation options in the form of heritage accommodation and semi-permanent standing camps.



## Destination Positioning

PWS has a long established tagline 'Share the Wonder' for its national parks and reserves. The Maria Island National Park experience is positioned as 'a tranquil island with a unique heritage'. The PWS brand is a relevant and useful framework for underpinning the Maria Island branding and messaging, and aligns with the new Tourism Tasmania campaign and its brand attributes.



## Positioning Maria Island in the market place

The East Coast Regional Tourism Organisation is developing a new brand which should be used for positioning authentic experiences for Maria Island. Those experiences need to that engage the target market by differentiating Maria Island as unique but also part of the Tasmanian landscape.

Maria Island should focus on experiences that are most likely to deliver on Brand Tasmania and the new East Coast Tourism Brand. Its aim will be to achieve higher yield and dispersal by connecting with target markets and raise the awareness of Maria Island landscapes. A stand-alone brand is not necessary and could potentially confuse target markets.

## Recommended Maria Island messaging

Maria Island messaging should link to East Coast brand positioning and:

- › recognise that the journey to the island is part of the visitor experience
- › recognise the range of immersive activities and soft adventures available (diving, kayak, walk, mountain bike, snorkelling)
- › build on the strong emotional attachment of past and repeat visitors to strengthen the social reconnection and motivation of lifelong learners
- › create competitive advantage that separates a day visit to Maria Island from a day visit to Port Arthur or other Tasmanian experiences
- › build on the strong positional work which 'Maria Island Walk's and other operators have already created in the market place
- › leverage off and complement the brand strategy and marketing plan for Australia's 11 World Heritage Convict Sites. This should provide a strong pillar but not over-ride other important elements of the Maria Island offer.

## Maria Island's Character Values

Market research conducted as part of this study indicates that the core attributes that resonate most with visitors to Maria Island are:

- › 'Natural, undiscovered, splendid isolation, a sense of freedom, a little challenging and independent-spirited'
- › 'A natural wildlife refuge like no other on earth, a safe haven for nurturing species for generations to come'

These character values should shape the experiences that are developed for visitors to the island and provide the key themes in the messaging for Maria Island in the context of the East Coast destination positioning.

Key messages that could be linked to the East Coast destination positioning and core experiences on Maria Island are:

- › Leave the worries of the world behind on an awe-inspiring journey across the Mercury Passage to an island of yester year
- › Get the best vantage point to watch the cinema of light and rock at painted cliffs
- › Take the time to see our endangered wildlife in their natural environment and see how they survive and thrive
- › Be drawn into sheltered coves, river estuaries and explore the mystery of Maria Island and create your own adventure.

## Suggested Maria Island Character Values



## Transport and Access

Maria Island has had a chequered history of ferry services over the past decade. It has seen a number of operators with varying expertise utilising different types of vessels of varying standards and sizes, different design specifications, passenger capacities and on-board passenger facilities.

In past years ferry operators have either pulled out or discontinued regular scheduled services making it extremely difficult for PWS to ‘manage, sustain and support’ an operator to deliver a viable and reliable ferry service. Most, if not all, past operators have blamed low passenger numbers and/or expensive operating costs for the failure or termination of services.

Market research indicates that the frequency and service of the ferry is a critical factor influencing the number of visitors to the island and the quality of their experience. It is clear from the market research that visitors to Maria Island rate the need for toilets, commentary, tea, coffee and snacks and a ‘hassle free’ luggage service highly for a ferry service. Most of these services are not currently offered. Feedback from trade organisations confirms this view.

The lack of a sustained, regular, high quality service to Maria Island and low visitor numbers has meant there is little or no incentive for investors to improve the offering on Maria Island. The successful guided walk operator ‘Maria Island Walks’ operates its own vessel to minimise the risk. While the various commercial opportunities recommended in this report have widely ranging risk profiles, the exposure to low visitor numbers or low growth is a high risk for all potential investors. This exposure is entirely dependent on the ferry operation.

Establishment of an affordable, consistent and high quality ferry service is the most critical need to stimulate visitor growth which will provide a reliable base for future capital development on Maria Island and a reduced risk for private sector investment in tourism.

## Ferry transport options

There are two options in relation to future ferry services for Maria Island.

- a) Maintain the status quo of existing operators and attempt to influence the frequency, quality and delivery of ferry services by way of incentives and subsidies to existing operators. This option is fraught with difficulties. Neither existing ferry is ‘fit for purpose’ or financially viable with the split nature of the market. Consequently there would appear little opportunity to significantly grow the market with this option.
- b) Provide for a single ferry operator by offering an exclusive ‘licence to operate’ with a new or second hand ‘fit for purpose’ ferry. A new professionally-run operation with increased frequency and reliability will undoubtedly drive its own growth and will be the foundation from which other entrepreneurial activities and investment can be built. While there is a significant cost involved in implementing this option in the medium to long term, it provides the best transport approach to drive growth in visitation to the island and economic benefits for the region.

### Recommended transport option

**Call for Expressions of Interest from one suitably qualified operator to establish a dedicated, regular, reliable and safe high quality “fit for purpose” passenger and freight service from Triabunna to Maria Island.**

**Tenderers should be able to demonstrate that they have the required expertise to run and operate a ferry service of this size and nature. Owner operators as well as established ferry or transport companies who have the expertise within their workforce to operate such a service should be considered.**

## Joint Marketing

There is a substantial opportunity for a partnership between a commercial ferry operator and the Glamorgan Spring Bay Council and Triabunna Visitors Centre to assist development and marketing of a quality ferry service. Glamorgan Spring Bay Council have indicated they would welcome a partnership with PWS and the successful ferry operator for use and development of the Visitor Centre to incorporate ferry bookings and other commercial retail activities (General Manager GSB Council pers com 2013).

All parties (PWS, the Council, ferry operator and the local tourism industry) will have a strong vested interest in ensuring optimal visitation to the island.

## Recommendation for ferry marketing

**Prepare a marketing plan in partnership with the ferry operator for the first few years of operation. Following this period a review of marketing and promotion of the service should occur on an annual basis.**

## Future Development

Once the ferry service is established and visitation is on a growth trend, there are a number of significant potential developments that the operator and PWS can then develop:

- › Feeder Eco Cruises from Darlington (working in with main ferry schedule) taking cruises around the island
- › Potential Naiad-type service from Darlington with a beach landing at the southern end of the island as an interim trial to demonstrate viability prior to construction of a wharf at the southern end of the island
- › Second smaller ferry to supplement existing schedule with groups and charters
- › A jetty at Encampment Cove for ferry access to the south of the island for the Maria Island Circuit Track and other visitor experiences.

## Recommended future access

**Following establishment of the ferry service consider additional access arrangements and products for Maria Island including:**

- › **Eco Cruises from Darlington**
- › **a Naiad-type service from Darlington to the south of the island**
- › **a second smaller ferry concentrating on groups and charters**
- › **a jetty at Encampment Cove for access to the south of the island.**

## Access for visitors with limited mobility

Although some paths around Darlington are relatively level, the topography round Darlington is quite steep making it difficult for those with limited mobility to travel from the Darlington jetty to the Historic Precinct.

One option for improving access to and around Darlington is the provision of a regular pick-up and drop-off courtesy buggy service. A similar service is provided at the Port Arthur Historic Site. Such a service could be booked in advance and include pick-up from the ferry.

## Experience Development

Adding value to existing activities to create vibrant experiences; expanding the range of activities to deliver on the core strengths; and attracting investment for select new products is required to enable tourism growth on Maria Island.

Market research undertaken with people who had recently visited Maria Island suggests that the following experiences have the greatest appeal:

- Half day or full day tour taking in local wildlife and marine animals in more remote areas of the island
- Half day sea kayak trail along the Maria Island coast and Marine Reserve
- Half day self-guided trail around the Darlington World Heritage Site
- 3 day cycling and walking trail with camping opportunities
- Full day indigenous heritage trail/tour around the island
- Events such as a Maria Island Heritage Festival.

An evaluation of potential products that appeal to target markets and are compatible with Maria Island’s positioning is provided below.

### Recommended potential commercial opportunities

Encourage the private sector to develop viable businesses on the island to assist with experience development in the following areas:

- **Guided tours of historic precincts, the Marine reserve (kayak, dive, boat, snorkel), and walking, cycling and wildlife tours**
- **Luggage transfer services from the ferry to Darlington and Encampment Cove for cyclists**
- **Retail sales (such as campers supplies, souvenirs)**
- **Equipment hire (such as mountain bikes, kayaks, canoes)**
- **Sales of prepared foods and refreshments (possibly linked to local providers)**
- **Accommodation services**

Product	Alignment with park and regional strategy	Economic contributions	Nature- and heritage tourism profile	Recreational activities	Uniqueness	Appeal to market	Resources required	Challenges
Multi day mountain bike/ sea kayak opportunity	★★★★★	★★	★★★★	★★★	★★★★	★★★★	Low	Attracting commercial operator to invest with uncertainty of ferry operation
Half day and full day sea kayaking	★★★★★	★★★	★★★★	★★★	★★★★	★★★★	Low	Attracting commercial operator to invest with uncertainty of ferry operation
Guided wildlife experiences	★★★★★	★★★	★★★★★	★★	★★★★★	★★★★	Moderate	Attracting commercial operator and infrastructure/resources required to support program
World heritage Interpretation	★★★★★	★★★	★★★★★	★★	★★★★★	★★★★	Moderate	Investment in interpretation
Indigenous Trail	★★★★★	★★★	★★★★	★★	★★★★★	★★★★★	High	Requires collaboration with Indigenous groups
School Education Programs	★★★★★	★★★	★★★★	★★★★	★★★★	★★★★★	Moderate	Requires programs to be developed by PWS
Events	★★★★★	★★★★★	★★★★	★★	★★★★	★★★★★	Moderate	Success dependent on local community involvement to support the event program

## Accommodation and other Infrastructure

Current accommodation options for visitors at Darlington include the Penitentiary (which returns the highest revenue for PWS); the Darlington campsite; campsites at Encampment Cove and French's farm, Prero's cottage; and Workshop accommodation.

The current mix of accommodation is suited to only a part of the target market. There is a need for high quality at every level of accommodation – camping, cabins and self-contained houses or cottages. Investment in renovating heritage accommodation or providing new accommodation is not the highest priority when compared to other investment requirements that are considered essential to increase day visitation to the island.

The Maria Island Conservation Management Plan (ERM 2008) states that a number of buildings can be adapted for accommodation purposes. Adaptation of the buildings would appeal to the market who seek self-contained restored heritage cottages and accommodation in a double room with electricity and private amenities. The buildings recommended for adaptation include the Bernacchi Buildings (two terraces and two buildings) and the Coffee Palace.

Semi-permanent tented accommodation is a cost effective and environmentally sustainable option that would appeal to the target markets. The most suitable site for this type of accommodation would be outside the Darlington Precinct and near Four Mile Creek or Trigonion Corner. Semi-permanent accommodation in this part of the Island should only be considered if it complements and does not detract from the camping experience offered in this area by 'Maria Island Walk's or other commercial operators.

A comprehensive infrastructure plan is required to stage the revitalisation of infrastructure according to demand requirements. It should cover service infrastructure such as utilities, landscaping, access, public amenities, required conservation works and interpretation and signage.

Maria Island should be recognised as a sustainable destination with best practice waste, water and energy practices that reduce the footprint and operational costs of the tourism enterprise. The infrastructure plan should include audits of energy, water and waste performance, based on current demand and projected demand, to determine infrastructure requirements, energy and water efficiency measures, waste management at Darlington and other key visitor nodes.

### Recommendation for accommodation and infrastructure

- ▶ **Develop additional accommodation in the form of heritage accommodation (such as the Coffee Palace and the Bernacchi Buildings) and semi-permanent standing camps.**
- ▶ **Develop a comprehensive infrastructure plan.**
- ▶ **Include measures for best practice energy, water and waste management in the infrastructure plan to establish Maria Island as a sustainable destination.**



## The socio-economic benefits of implementing the strategy

By implementing the recommendations in this report, the Government will demonstrate a commitment to generating tourism growth and working with industry and community partners to establish a prosperous tourism industry for the local and regional economies.

A revitalised Maria Island, together with the recent investment in local marine infrastructure, provides a strong opportunity for Triabunna to reposition itself as a regional hub for island tourism and marine activities.

The related regional increase in visitation and expenditure is likely to attract further investment in the East Coast. In turn, this will present an opportunity for existing and new businesses to develop products and services to meet visitor needs. This could include transport, merchandise, accommodation, provisioning, tourism guiding and services associated with marine activities.

In the longer term, the natural harbour and existing privately-owned port facilities associated with the closed chip mill offer the potential to develop Triabunna as a deep water port. This port could attract cruise ships and provide freight facilities if adequate infrastructure and services are available.

As visitation increases there will be a corresponding increase in visitor expenditure particularly within the accommodation and food services industry. New visitor markets and increased length of stay for existing markets will improve accommodation occupancy rates and may stimulate investment in new accommodation infrastructure.

A revitalised Maria Island will create a new value proposition that can be developed with the Glamorgan Spring Bay community and East Coast Tourism Board. It will enable Government to demonstrate its commitment to TOMI\* and working with community partners and businesses to create a more holistic

destination experience, particularly for communities such as Triabunna who need tourism to remain prosperous.<sup>1</sup>

The revitalisation of Maria Island and associated increase in visitation and economic activity will provide social benefits to local communities. It will create a wider range of local employment opportunities particularly in the hospitality, accommodation, food and services industries. Training for local residents in the relevant skills is envisaged during the implementation phase of the project. It will provide local employment options for workers who previously have had to commute to larger centres such as Hobart.

Overtime, increased economic activity will stimulate investment in other service and support industries which will further increase employment, service and lifestyle benefits for people in the region.

An increased tourism profile for the East Coast could contribute towards increased pride within local communities and assist in mobilising optimism and energy for development. Increased community spirit and participation has occurred in relation to other tourism development projects in other regions in Australia.

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<sup>1</sup> TOMI – Triabunna/Orford Maria Island visitor plan prepared by Inspiring Place during 2011 for the Glamorgan-Spring Bay Council in conjunction with PWS, Tourism Tasmania, Orford/Triabunna Chamber of Commerce and the Freycinet Coast Tourism Board.

## Appendix 1. Overcoming the barriers to growth

The following table provides a summary of the island’s competitive strengths, gaps and opportunities and strategies that could be adopted to align the visitor expectations and generate tourism growth.

Core Element	Strength of Current Maria Island Experience	Weakness	Desired Experience	Potential Strategies to Optimise
<b>Transport and Access</b>	<ul style="list-style-type: none"> <li>Established ferry operations</li> </ul>	<ul style="list-style-type: none"> <li>Reliability, capacity and timetable of current ferry</li> <li>Size of and type of vessels</li> <li>Competing operators /confusion in market</li> </ul>	<ul style="list-style-type: none"> <li>New reliable, high quality passenger and freight service transports visitors to two points on the island – Darlington and Encampment Cove to service coastal circuit</li> </ul>	<ul style="list-style-type: none"> <li>Establish new high quality ferry operation</li> <li>Provide Integrated booking service</li> <li>Luggage transfer to accommodation</li> <li>Construct second jetty</li> <li>Review current jetty upgrade at Darlington</li> </ul>
	<ul style="list-style-type: none"> <li>Upgraded wharf infrastructure at Triabunna and Darlington will support visitation to Maria Island.</li> </ul>	<ul style="list-style-type: none"> <li>Wharf infrastructure had not been designed easy access to and from vessel</li> <li>Integrated services</li> <li>Lack of infrastructure to support less mobile in and around Darlington Area</li> <li>Visitor departure point at Triabunna is difficult to navigate for visitor</li> </ul>	<ul style="list-style-type: none"> <li>Wharf infrastructure supports easy passenger and freight transfer</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to create a potential visitor hub (gateway) for Maria Island.</li> <li>Provide for people with limited mobility</li> </ul>
	<ul style="list-style-type: none"> <li>Air strip on Maria Island</li> </ul>	<ul style="list-style-type: none"> <li>Not currently utilised due to lack of demand</li> </ul>	<ul style="list-style-type: none"> <li>High end visitors air strip as way of access and possible scenic flights</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to maximise use to high end market from Freycinet Coast/Hobart and cruise ships over time</li> </ul>
<b>Activities &amp; Products</b>	<ul style="list-style-type: none"> <li>Outstanding diversity and abundance of nature and heritage values that are readily accessible</li> <li>World Class Marine Environment - Marine Protected Area, fishing, diving, water sports, marine tourism, Dive Wreck – Troy D</li> </ul>	<ul style="list-style-type: none"> <li>Limited range of products that appeal to target markets</li> <li>Undersupply of packaged experiences to cater to range of education markets</li> <li>High competitor standards</li> </ul>	<ul style="list-style-type: none"> <li>A menu of experiences that meet the needs and aspirations of the target markets and showcase the values of the island</li> </ul>	<ul style="list-style-type: none"> <li>Package new range of experiences that appeal to target markets and that focus on the most unique values of the island</li> <li>Develop a menu of experiences from which visitors can customize an itinerary from ½ day to 3- 5 days</li> <li>Provide experiential learning opportunities and programs for school education groups that deliver on the National Curriculum</li> <li>Identify infrastructure needs and provide or upgrade</li> <li>Invite commercial operators to run scheduled tours covering wide range of activities &amp; services</li> <li>Continual benchmarking against competitors</li> </ul>

Core Element	Strength of Current Maria Island Experience	Weakness	Desired Experience	Potential Strategies to Optimise
		<ul style="list-style-type: none"> <li>Stages of the travel cycle for visitors to Maria Island are not well catered for</li> </ul>	<ul style="list-style-type: none"> <li>All stages of the visitor travel cycle are addressed</li> </ul>	<ul style="list-style-type: none"> <li>Define core brand values, core experiences and the story's for inclusion in marketing strategy</li> <li>Make Pre-trip Planning information readily available on website and main visitor centres</li> <li>Develop an integrated visitor experience from critical staging points -Triabunna or Hobart/Launceston)</li> <li>Package transport, accommodation and activities from Hobart and Triabunna</li> <li>Make way finding clear</li> <li>Basic needs are met (food, shelter, mobility access)</li> <li>Broad range of personal and non-personal interpretive products and programs is offered</li> <li>Reminders of the trip are available</li> </ul>
<b>World Heritage Values</b>	<ul style="list-style-type: none"> <li>Accessible historic heritage with WHA status with companion cultural and heritage experiences nearby</li> </ul>	<ul style="list-style-type: none"> <li>Difficult access for people with limited mobility</li> </ul>	<ul style="list-style-type: none"> <li>World heritage site is part of cooperative program with other WHA convict sites that provides leverage, packaged experiences and management expertise</li> </ul>	<ul style="list-style-type: none"> <li>Package WHA experience with other WHA sites in Tasmania and cross promote</li> <li>Strengthen partnership with Port Arthur for leverage opportunities</li> <li>Provide for access for people with limited mobility.</li> </ul>
<b>Commercial operations</b>	<ul style="list-style-type: none"> <li>Range of existing nature-based tourism operators (land, marine and air)</li> </ul>	<ul style="list-style-type: none"> <li>Lack of demand for product reduces take up</li> <li>Current services could be provided by existing licensees</li> </ul>	<ul style="list-style-type: none"> <li>Range of commercial operators providing range of experiences on the island</li> </ul>	<ul style="list-style-type: none"> <li>Develop opportunities for new licence opportunities and tourism growth</li> </ul>
<b>Award Winning Core experience</b>	<ul style="list-style-type: none"> <li>Maria Island Walks offers award winning product to high end market</li> </ul>	<ul style="list-style-type: none"> <li>Limited options to value add for clients</li> </ul>	<ul style="list-style-type: none"> <li>Maria Island Walks continues to offer outstanding product and position Maria Island in the market place</li> </ul>	<ul style="list-style-type: none"> <li>Maximise the development of this product and support the operator as far as possible</li> </ul>
<b>Branding and marketing</b>	<ul style="list-style-type: none"> <li>Island is a good fit with Tourism Tasmania's new brand</li> </ul>	<ul style="list-style-type: none"> <li>PWS Brand positioning does not capture or inspire visitors to Tasmania to visit Maria Island.</li> <li>Not part of industry wholesaling and distribution networks</li> </ul>	<ul style="list-style-type: none"> <li>The Maria Island brand makes a promise, has a personality, and evokes a set of emotions. stories are created that visitors will want to take back to their family and friends; experiences are offered that will engage their senses, fill their souls, and connect them with Maria Island</li> </ul>	<ul style="list-style-type: none"> <li>Adopt brand positioning of Tourism Tasmania and the East Coast Region. Define core values and experiences for Maria Island that fit within these brands. Integrate marketing effort with regional tourism board, ferry and other commercial operators</li> </ul>

Core Element	Strength of Current Maria Island Experience	Weakness	Desired Experience	Potential Strategies to Optimise
<b>Accommodation</b>	<ul style="list-style-type: none"> <li>› Accommodation exists on the island at Penitentiary and camping grounds</li> <li>› Low end accommodation on island has appeal to school groups and large family groups</li> <li>› Heritage buildings can be upgraded to allow for additional accommodation in keeping with the conservation management plan</li> </ul>	<ul style="list-style-type: none"> <li>› Limited options that appeal to a small market</li> <li>› Seasonal fluctuations</li> <li>› Limited amenities</li> <li>› Low yield product that is presented below market rates</li> <li>› Logistical issues for transferring luggage</li> <li>› No basic supplies</li> </ul>	<ul style="list-style-type: none"> <li>› Heritage accommodation options appeal to broader range of markets and are linked to the experiences on offer.</li> <li>› New stand-alone eco lodge developed in Encampment Cove area to service multi day walkers on coastal circuit track</li> </ul>	<ul style="list-style-type: none"> <li>› Retain accommodation suitable for school groups</li> <li>› Address low and shoulder seasons by offering to school groups</li> <li>› Provide purchasable supplies.</li> <li>› Package accommodation and experiences with local operators and suppliers in Triabunna</li> <li>› Upgrade heritage buildings and provide for accommodation that meets target market's needs.</li> <li>› Provide luggage transfer service</li> <li>› Upgrade amenities and other service infrastructure</li> <li>› Standing camps provided along coastal track for soft adventure programs – kayak, cycle, walk.</li> </ul>
<b>Stories and Interpretation</b>	<ul style="list-style-type: none"> <li>› Rich stories of history of Darlington</li> </ul>	<ul style="list-style-type: none"> <li>› Interpretation is of limited appeal and has gaps as per gap analysis of interpretation of Maria Island (PWS 2011)</li> </ul>	<ul style="list-style-type: none"> <li>› Broad range of interpretation methods are used that appeal to target markets</li> </ul>	<ul style="list-style-type: none"> <li>› Offer a broad range of personal and non-personal interpretive products and programs</li> </ul>
<b>Visitor services and infrastructure</b>	<ul style="list-style-type: none"> <li>› Power, water and sewerage</li> </ul>	<ul style="list-style-type: none"> <li>› Limited capacity of service infrastructure</li> <li>› The high cost of providing services on Maria Island due to its remoteness</li> </ul>	<ul style="list-style-type: none"> <li>› A higher volume of visitors and higher yield experiences will support the future provision of quality sustainable facilities and services.</li> </ul>	<ul style="list-style-type: none"> <li>› Upgrade services to achieve eco accreditation, reduce maintenance requirements.</li> </ul>
<b>Management</b>	<ul style="list-style-type: none"> <li>› Management capacity and lack of resources may compromise the visitor experience and park management objectives</li> </ul>	<ul style="list-style-type: none"> <li>› The current organisational model will not drive growth to the island</li> </ul>	<ul style="list-style-type: none"> <li>› A new organisational model supports visitor growth to Maria Island and provides for business enterprise</li> </ul>	<ul style="list-style-type: none"> <li>› Business enterprise requires business manager to drive growth and revenue – potential to share Tourism Manager with local shire</li> <li>› Provision of visitor services drawn from local region – cleaning, commercial operators, equipment hire, catering, purchasable supplies etc</li> </ul>

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