
BRUNY ISLAND TOURISM STRATEGY

prepared by
KINGBOROUGH COUNCIL

September 2017



This Strategy was originally prepared in October 2011. Major reviews have since been carried out by Kingborough Council in July 2014, January 2015, April 2016, November 2016 and now September 2017, following the completion of the Bruny Island Destination Action Plan and the Bruny Island Placemaking and Experience Strategy. All photos were taken by Sarah Wilcox.

Table of Contents

EXECUTIVE SUMMARY.....	4
1. INTRODUCTION.....	7
2. BRUNY ISLAND BACKGROUND.....	9
2.1 DEMOGRAPHIC PROFILE.....	9
2.2 SOCIO-ECONOMIC FACTORS.....	11
2.3 COMMUNITY VIEWS	12
2.4 PROTECTION OF NATURAL VALUES.....	16
2.5 TOURISM INFRASTRUCTURE	18
2.6 EMERGENCY MANAGEMENT.....	27
3. TOURISM OVERVIEW.....	31
4. TOURISM ON BRUNY ISLAND.....	35
4.1 VISITORS TO BRUNY ISLAND.....	35
4.2 TOURISM BUSINESSES ON BRUNY ISLAND.....	37
4.3 TOURISM MARKETING.....	39
4.4 BRUNY ISLAND DESTINATION ACTION PLAN	40
4.5 BRUNY ISLAND PLACEMAKING AND VISITOR ENGAGEMENT.....	41
5. A TOURISM VISION.....	46
6. BRUNY ISLAND TOURISM STRATEGY.....	48
6.1 MARKETING THE BRUNY ISLAND EXPERIENCE.....	49
6.2 PRODUCT AND BUSINESS DEVELOPMENT	52
6.3 VISITOR INFORMATION AND MANAGEMENT.....	55
6.4 VISITOR ACCESS AND TRANSPORT.....	57
6.5 INFRASTRUCTURE DEVELOPMENT.....	59
6.6 COMMUNITY AND INDUSTRY COLLABORATION.....	60
7. RESOURCING STRATEGY IMPLEMENTATION.....	63
8. SUMMARY OF PRIORITY ACTIONS.....	67
9. REFERENCES.....	76

EXECUTIVE SUMMARY

This Bruny Island Tourism Strategy aims to provide a framework for the future development of tourism on Bruny Island – and, in particular, form the basis for a sustainable and competitive tourism industry into the future. The underlying principle on which the Strategy is based is that there is a need to manage the levels of tourism activity on Bruny Island within the capacity of the Island's infrastructure, its natural values and the common desires of both the Island's resident community and visitors.

The Strategy reviews the available information and provides an action plan to assist future tourism development on Bruny Island. A list of actions has been prepared that has been derived from the conclusions within this strategy, community discussions, advisory committee meetings and studies that have been completed during recent years.

Bruny Island should always be a special place that people come to visit in order to experience something different. It is a large island with many unique attractions. These same attractions are the reason why many people choose to live permanently on Bruny Island. The permanent resident population is likely to remain relatively small (about 800), with only about a third of the dwellings being permanently occupied. This makes for a very different community – one that will always be characterised by visitors (shack owners and tourists) passing through and having short to extended stays within the local community. The pressures and demands this places on a relatively small island community are not unique but they must be managed in order to avoid congestion, unacceptable site impacts and public safety and amenity issues during peak periods.

There will always be funding constraints, particularly for larger projects that involve the provision of new or upgraded physical infrastructure. Available funds should be used and prioritised so that best value is obtained. Similarly, the limited funds available to promote the tourism attractions and to effectively communicate important messages to visitors will also need to be carefully allocated. The Strategy seeks to utilise potential funding sources to the maximum extent possible, but also identifies projects that need to be pursued if additional funds can be obtained.

The ferry itself places a natural constraint on the numbers of visitors that Bruny Island can accept. A second ferry has been brought into service and provides additional capacity during the peak tourism periods of the year. However, it is not just the ferry, but the rest of the Island's infrastructure that is put under strain when visitor numbers increase. The social and environmental impacts of tourism on Bruny Island can only be effectively managed if the public infrastructure has the capacity to accept the pressures experienced during the peak tourism period. The quality of both the visitor and resident experience is then threatened. This Strategy attempts to address this particular concern.

The Strategy also identifies some inherent social and economic sustainability issues for Bruny Island. The Island's population is relatively stable, but there is an ageing demographic and an

increasing dependence on a rate-base derived from absentee landowners. This poses some challenges for the ongoing sustainability of the community. There are also limited opportunities to develop sufficient economic activity that can produce employment and encourage younger people to remain on the Island. The main opportunities do in fact relate to tourism, plus some other agriculture, aquaculture and value-added food production activities – each of which build on the growing recognition of Bruny Island’s natural produce and gourmet food reputation.

Tourist and visitor numbers have steadily increased in recent years on Bruny Island. Broader trends and future projections indicate that visitor numbers are expected to continue to grow at much the same rate in the short to medium term. The Strategy aims to encourage the continued growth of the tourism industry on Bruny Island in a sustainable manner. To do so, it will be necessary to increase the “yield” from visitors, market the Island appropriately, encourage appropriate new tourism developments and provide the public infrastructure that is needed.

Increasing the yield from visitors can be achieved by encouraging greater expenditure by visitors while they are on Bruny Island, primarily through converting day trips into overnight or multiple night stays. A complementary marketing strategy is to encourage increased visits outside peak periods, resulting in more viable local businesses, encouraging the development of new visitor experiences and creating more employment opportunities on the Island. To achieve these outcomes, more accommodation is required on the Island, including accommodation that can cope with larger groups than just single families.

This Strategy provides the necessary background and recommendations for the tourism marketing and promotion of Bruny Island as a whole. There are opportunities to involve the local tourism operators in coordinated marketing efforts and to more effectively ‘brand’ the Island in a way that benefits everyone. Some important messages need to be communicated, particularly in regard to the need for visitors to take their time, to stay longer and to minimise impact.

These outcomes are consistent with the key underlying objectives of this Tourism Strategy, which are:

To promote an environmentally responsible and sustainable tourism industry on Bruny Island;

To minimise the adverse impact of tourism on the permanent residents of Bruny Island;

To increase the quality of the tourism experience on Bruny Island;

To increase the economic contribution of tourism to Bruny Island by increasing yield and length of stay;

To reduce the high seasonal nature of tourism visits to Bruny Island so that is a popular destination all-year round;

To develop a cohesive and united tourism sector in order to enhance Bruny Island's overall marketing impact; and

To develop a "whole-of-island" brand for the Island that is supported by the community and all industry sectors.

The benefits from such an approach would be:

Increased investment on the island from the tourism industry as it appreciates the opportunities of a higher yield from visitors;

A coordinated effort from all tourism operators as they see the benefits of cross-referrals and common marketing strategies;

Increased services (shops, community and recreation) being provided in order to take advantage of the higher visitor expenditure and demand for activities;

Increased tolerance and acceptance of tourists from the permanent population as visitors stay within that community and local infrastructure is upgraded;

Visitor activity is dispersed around the Island so that all operators benefit and the impact on a few "hot spots" is reduced; and

There is an optimal use of public infrastructure, particularly if upgrades or improvements can be targeted to those areas that are under the most pressure.

Bruny Island provides an emerging range of visitor attractions that are becoming more sophisticated and well known. In recent years, Bruny has been widely promoted on the back of its natural attractions, food, wine and heritage. The quality of the natural environment in particular forms the basis of Bruny Island's attraction for most tourists and other visitors. The Island's dramatic coastline and marine wildlife will continue to be a central plank in any viable tourism industry on Bruny Island. It is important that all related tourism activities are conducted in an environmentally sustainable manner in order that continued access can be provided for visitors to experience these world-class attractions.

Finally, it is important that this Bruny Island Tourism Strategy (and subsequent reviews) is consistent with the various regional tourism and economic development plans. This is so that those aspects of the Strategy that are of critical importance to the growth of the southern region of Tasmania are adequately resourced and remain relevant into the future.

1. INTRODUCTION

This Tourism Strategy had its origins in discussions that were held by the Bruny Island Advisory Committee (BIAC) over a number of years. BIAC is an advisory committee established by Kingborough Council. It provides advice to Council in regard to a wide variety of matters, although most issues relate to the local public infrastructure that is needed to address the needs of local residents and tourists.

In 2010, BIAC had recommended to Council that a strategic overview report be prepared for Bruny Island and this was subsequently endorsed by Council. The current Tourism Strategy incorporates this original “overview” objective, while specifically focusing on tourism related issues and particularly on the need for appropriate infrastructure so that the daily requirements of both visitors and residents are effectively met.

This Strategy fulfills a number of objectives. Tourism Tasmania was keen for such a strategy to be completed as it would fill a gap within the regional framework of existing similar strategies – and so contributed some of the original funds to assist the Strategy’s preparation. The Strategy was prepared in-house by Council (with the initial assistance of independent consultants) and stakeholder consultation has occurred at various times during its preparation and review (including the Bruny Island Advisory Committee (BIAC), Friends of North Bruny (FNB), Friends of Adventure Bay (FAB), Bruny Island Environmental Network (BIEN), Bruny Island Community Association (BICA) and the Bruny Island Tourism Association (BITA)). The original strategy (prepared during 2011) has been reviewed on a number of occasions.

More recently (during 2016) there were a number of other investigations that required a more thorough review of the Strategy in order to accommodate their conclusions and recommendations. They have included the Bruny Island Destination Action Plan (facilitated by Destination Southern Tasmania) and the Bruny Island Placemaking and Experience Key Findings Report and Strategy (prepared by consultants Living Well). The latter was a case study prepared as part of the Tasmanian Visitor Engagement Strategy. Council had also commissioned a Bruny Island Hazard Communication and Risk Study and there were a range of other activities associated with a review of the ferry contract, community resilience and telecommunication improvements.

The evolving nature of this Strategy means that it is a ‘working’ document that will be kept up to date in order to ensure its ongoing relevance. It is not an exhaustive study. It takes a higher-level approach and draws mainly from existing information sources and knowledge held within Kingborough Council. It is intended to be a practical and pragmatic document that can be applied by the relevant stakeholders. It promotes a series of strategies that reflect the unique circumstances that exist on Bruny Island.

The following points summarise why this strategy is needed:

tourism has the most important role in the future economic development of Bruny Island and a more strategic approach is required to take advantage of future opportunities;

a proactive strategic approach is required to address local community concerns about the adverse impacts of tourism and increasing visitor numbers;

a tourism strategy can assist in providing some underlying policy justification for any future improvements to the existing ferry services to the Island;

an understanding of future tourism activity will help in determining limits on the commercial use of public infrastructure;

the strategy can help in supporting appropriate land use planning controls that accommodate both local community and tourism needs;

the strategy should be able to complement and provide some direction for future tourism marketing and promotion of Bruny Island;

an adopted tourism strategy would be able to support grant applications that seek to better promote Bruny Island or improve public infrastructure; and

policy and strategic justification is required in identifying and prioritising future capital infrastructure works programs (for both State and Local Government).

Bruny Island itself experiences many characteristics that are common to other small coastal or island communities around Australia, but it also has many quite unique features. It has a very rich history and heritage, and a natural environment that attracts many visitors and residents. It is increasingly becoming a “sea change” community as new residents, retirees and holidaymakers move to live on the Island – either permanently or temporarily.

The level of tourism activity on Bruny Island has increased markedly in recent years and the attractions that the Island offers have been well promoted and have stimulated increased visitor numbers. These visitors may be coming to Bruny for the day only, spending a few nights or staying for extended periods in their “shacks”. There has been an increased level of private investment in constructing new residences and starting up new commercial ventures.

This increased level of activity has highlighted deficiencies in the capacity of public infrastructure and this has in turn raised concerns about public safety, health, amenity and environmental impacts. Bruny Island residents are increasingly frustrated with the inability of infrastructure to meet the peak season demands of tourism. As a result, there are demands being placed on Kingborough Council and the State Government to be more proactive about improving public infrastructure and matching this to the actual levels of use that it is subjected

to. Communicating important messages to visitors is part of any solution and this in turn leads to the need for a coordinated marketing strategy for Bruny Island.

Leadership is also being called for into determining what should be the sustainable level of development allowed on Bruny Island. This is essentially a question of balancing the capacity of the infrastructure to the demands that are being placed upon it by both residents and visitors. It is not expected that there can be any definitive answers in this regard, as there will be many different views as to what might constitute a sustainable level of activity or development. The Bruny Island community itself has varying tolerance levels to visitor impacts. It is very difficult to define such issues as infrastructure capacity, community aspirations and commercial feasibility. Nevertheless, it is acknowledged that these and related issues should continue to be examined in more detail and that this be articulated within this Strategy in a manner that may assist future decision-making.



2. BRUNY ISLAND BACKGROUND

2.1 DEMOGRAPHIC PROFILE

The population (permanent residents) of Bruny Island at the 2016 Census was 813, compared to 771 in 2011. There had been a significant increase since 2006, when the population was 665, although this had dropped from the 2001 figure of 691. Most of the recent population growth has occurred in south Bruny. While there has been a noticeable growth in the 5-14 age group, the most dominant characteristic of the Bruny population is its older age structure – much older than the rest of Kingborough.

In 2016, 552 people lived on south Bruny (70%) and 245 lived on north Bruny (30%). This compared to 2011, when there were 534 people on south Bruny (69.3%) and 237 on north Bruny (30.7%) and in 2006, when there were 449 on south Bruny (67.5%) and 216 on north Bruny (32.5%).

The following table breaks the population down into age categories. The figures indicate the results of both the last three Census to show the changes over time. It indicates that there are relatively few younger people under the age of 25 and the number of people over the age of 65 has increased markedly.

AGE	NORTH BRUNY			SOUTH BRUNY			TOTAL BRUNY		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
0-4	11	9	17	14	16	18	25	25	35
5-14	20	24	7	33	57	44	53	81	51
15-19	0	5	3	15	13	10	15	18	13
20-24	4	3	0	6	5	3	10	8	3
25-34	20	12	17	23	20	36	43	32	53
35-44	29	23	21	66	60	33	95	83	54
45-54	31	34	24	79	90	72	110	124	96
55-64	51	67	63	126	135	134	177	202	197
65-74	31	39	58	63	99	150	94	138	208
75-84	19	14	25	17	26	48	36	40	73
85+	0	7	10	7	10	4	7	17	14
TOTAL	216	237	245	449	534	552	665	771	797

Source: 2016 Census (2011, 2006 Census)

TABLE 1: BRUNY ISLAND'S POPULATION BY AGE

The main demographic characteristic is that Bruny Island has a much older population than the rest of the Kingborough municipality and Tasmania in general. About 74% was older than 45 years of age and 37% percent was older than 65 years of age. More than one third of the permanent population on Bruny could be described as “retirees”. For the rest of Kingborough these same figures were 46% and 19% respectively. The median age for Bruny Island is 58.8 (it was 55 in 2011), compared to 42 for both Kingborough (it was 40 in 2011).

This ageing of the population has a major impact on the development of any social or economic strategy for Bruny Island. For example, the ageing population will reduce the capacity of the permanent population to provide a range of voluntary and internal community support roles. This is already occurring as existing longstanding community volunteers are “retiring” and there are fewer options for replacements.

Another particular issue is that the need for health services will become increasingly apparent. The Community Health Centre at Alonnah is able to partly address this need, though there will be other ongoing health services, support and activities for the elderly required and there will be significant economic (eg employment) and infrastructure implications. It is likely that the continued provision of such services will become problematic, and older residents will need to leave the Island. These same health and emergency services are being placed under increased pressure as visitor numbers increase – for example the increased number of road accidents is said to be because of drivers that are unfamiliar with local conditions.

A population with an age cohort so skewed towards retirement also poses challenges for tourism operators, or any employer, seeking skilled staff to expand or start new businesses. Finding suitable and sufficient local staff to work in the increasing number of tourism businesses on the Island is an ongoing issue that is regularly reported by local businesses.

2.2 SOCIO-ECONOMIC FACTORS

The other major demographic feature of Bruny Island is that only about one third of the residences are permanently occupied. There are a very high number of holiday homes or “shacks”. There are many property owners that do not reside permanently on Bruny but do spend time living there – whether this be on weekends, holidays or for longer periods.

On the Census night in 2016 there were 358 occupied dwellings (343 in 2011) and 684 unoccupied dwellings (699 in 2011). This equates to only 34% of the dwellings on Bruny being permanently occupied, compared to 86% across Tasmania as a whole. The distribution of all private dwellings in 2016 was 353 in north Bruny (343 in 2011 and 301 in 2006) and 689 in south Bruny (699 in 2011 and 660 in 2006). The highest proportion of holiday dwellings occurs in Dennes Point, Adventure Bay and Lunawanna.

This housing mix and the seasonality of the resident population have a significant impact on the economic viability of businesses and the social dynamics within the community. The summer season sees a greater influx of people and higher levels of general activity on the Island. Any tourism plan for Bruny Island must consider the implications of such housing and seasonal impacts.

Industry employment statistics for 2016 are not yet available. In 2011, 34% of the permanent residents on Bruny Island indicated that they were employed. Of these, 30 persons indicated that they were employed in the Accommodation & Food Services sector. It is uncertain which category would have been chosen for those others who are employed in hire or tour services or the tourism related manufacturing and retail businesses. It is however clear that the most significant employment sectors on the Island are the various tourism related activities, plus public services, construction, agriculture and aquaculture.

The limited resident population on the Island is in itself a constraint on the ability of tourism businesses to expand and grow. There is a smaller pool of potential employees to draw from and prospective businesses do need to take this into account.

The Department of Infrastructure Energy and Resources (DIER) commissioned a report in 2005 as part of its investigations into the ferry service. This report examined the socio-economic features of Bruny Island and many of these are still relevant today.

There had been steady population growth since 1981. As is still the case, demographic data demonstrated considerable growth in the 50 years and over age group. Population growth was

projected to continue on the basis of lifestyle choice, despite the lack of available services and public infrastructure. It was estimated by this study that population on the island swells to about 2,000 during peak periods when temporary residents occupy their holiday dwellings. It is now clearly evident that, due to the Island's increased popularity, the current peak-period population would now be well more than double this figure. It would be in excess of 5,000 in these peak periods.

The economy on Bruny Island was then based on a variety of industries including forestry, agriculture and aquaculture, each with freight requirements. Other important industries included tourism, construction, businesses and health and human services. Since 2005, forestry activity has effectively ceased and tourism has greatly increased. There has been a steady increase each year in the total tourist numbers and in the number of new dwellings. It was then found that Bruny Island faced unique challenges as an island economy in sustaining any economic growth, particularly in regard to transportation constraints. The Island's traditional resource industry base relies on efficient freight transportation in order to market its produce, particularly given the time sensitivity of commodities such as oysters, cherries and livestock.

The identified ferry transportation issues mentioned in this study included time sensitivity of freight; an inability to expand farming operations because of truck size limits; limitations on visitor numbers and lack of overnight accommodation at peak periods; and access problems for health professionals. The then suggested solutions related to ferry size, an additional ferry, priority access to the ferry and/or a booking system and park-and-ride facilities. In regard to the road system, the safety of the unsealed sections was the key issue. Some of these transport issues and solutions are not as relevant now as they were ten years ago.

The recent major increase in visitor numbers has placed a greater strain on the local community in providing for some essential services. There are less local people prepared to be involved in community activities due to an ageing population. An increased number of road accidents and anti-social behavior (eg littering and environmental damage) also puts the local community under greater stress.

Bruny Island's ageing population have frequently expressed a desire to "age in place" or not have to leave the Island so early in order to enter a retirement home. In recent years a local community group has been investigating the options in this regard, including the replacement of the existing Glensyn units at Alonnah. These investigations are ongoing and will include an assessment of what the actual demand is on the Island for different forms of aged care and accommodation.

2.3 COMMUNITY VIEWS

In 2005, Kingborough Council received a petition from 258 Bruny Island ratepayers that called for a "Future Vision Plan" for Bruny Island. The petition expressed concerns that "insufficient attention is being paid to the ability of the Island's infrastructure (ferry, roads, ambulance, SES

& fire, telephone, waste disposal & recycling, post, energy, water and community health) to cope with increases in population.” It was suggested that the Future Vision Plan should provide “a balance between the permanent population and the supporting infrastructure while preserving the appealing uniqueness and non-suburb like character of Bruny Island”.

In 2006, Kingborough Council circulated a survey form to all Bruny Island property owners. There was a mail-out of 1255 and 185 responses were received – a 15% response rate. The survey sought the views of the Bruny Island community on what people saw as being the strengths, weaknesses, opportunities and threats in relation to living on Bruny Island. A similar survey was then repeated in 2013 and there were 358 responses – a 28% response rate. The responses from the two surveys were quite similar and are as indicated in the table below:

2006 SURVEY RESULTS	2013 SURVEY RESULTS
The main “strengths” or advantages in living on Bruny Island were described as being the natural environment, the more relaxed lifestyle, a supportive community and the isolation of island life.	The main “strengths” or advantages in living on Bruny Island were described as being the natural environment, the more relaxed lifestyle, absence of pollution, overcrowding, traffic and noise, the isolation of island life and a safe environment with little crime.
The “weaknesses” or negatives about living on Bruny were described as being the frustrations associated with the ferry service (particularly during peak times), the standard of roads and inadequate infrastructure for tourists and visitors.	The “weaknesses” or negatives about living on Bruny were described as being problems associated with the ferry service, poor quality roads, inappropriate development, intolerance within community to alternative views, lack of visitor infrastructure and inadequate waste disposal services.
The “opportunities” to improve living conditions on Bruny Island were described as being the encouragement of low-key tourism activities and improving tourist infrastructure, ensuring future development is sympathetic to natural values and improving the roads and ferry service.	The “opportunities” to improve living conditions on Bruny Island were described as being additional ferry services, the encouragement of low-key eco-tourism activities, improved road conditions, further encouraging local industry and providing more tourism/visitor infrastructure.
The “threats” to the existing living conditions on Bruny Island were described as being inappropriate or excessive development, the loss of natural heritage, environmental impact, the ageing population, road safety and inadequate infrastructure to support existing/future tourism levels.	The “threats” to the existing living conditions on Bruny Island were described as being inappropriate or excessive development, pollution, weeds and feral pests, the loss of natural heritage, environmental degradation, inadequate tourism infrastructure and maintenance, and road safety.
Most people felt that Bruny Island could support an increase in population (103 people stated this, compared to 62 who said they would not support an increase).	Most people felt that Bruny Island could support an increase in population (75% of people stated this, compared to the rest who wanted the Island to remain “as is”).
The main infrastructure issues (particularly if population did increase) were listed as being the need to improve health and emergency services,	The main infrastructure issues were listed as being the need to better protect the natural environment, more roadside footpaths, and

<p>maintain/improve roads, improve ferry services and improve a broad range of other community services and infrastructure.</p>	<p>improved or increased waste disposal, ferry, road, public transport and police services.</p>
<p>The top 5 priorities for Bruny Island appeared to be (1) improving the standard of roads and provide improved road safety, (2) controlling inappropriate development and encouraging commercial development to support local community needs, (3) improving the ferry services (by giving priority to residents, providing a second ferry at peak times, and improved shore facilities), (4) improved health services, and (5) improved environmental management.</p>	<p>The top 5 priorities for Bruny Island appeared to be (1) improving the standard of roads and provide improved road safety, (2) ensuring development is designed to suit the Bruny character, (3) improving the ferry services, (4) providing better public toilets and other visitor amenities, and (5) supporting local businesses (such as arts and crafts) – plus improving environmental management and pest control.</p>
<p>A “vision” for Bruny Island included phrases that emphasized the protection of Bruny’s unique natural values, the strong sense of community, good quality public infrastructure, preserving the existing slower pace of life, supporting low-key development and responsible tourism, balancing the needs of residents and tourists and the need for effective long term planning.</p>	<p>A “vision” for Bruny Island included phrases that emphasized the protection of Bruny’s unique natural values (retain as destination of world heritage, good clean environment, natural beauty is unique), a slower more peaceful lifestyle, a low-key tourism destination, and the need to essentially leave the Island as it is.</p>
<p>The main suggestions for practical, cost-effective short-term measures included improving the road conditions, reviewing the ferry service, controlling development and upgrading health services.</p>	<p>The main suggestions for some short-term measures included a greater control of advertising signage, upgrading existing public toilets, improving the ferry service (eg giving priority to residents) and encouraging the emerging businesses on the Island.</p>

It should be noted that since the first survey was done, the new community health centre had been constructed (in 2009) and the Main Road had been sealed (in the Great Bay area) and repaired (in the Alonnah and Lunawanna areas). These actions addressed a few of the concerns mentioned by respondents in that first survey.

There is not a great deal of difference in community views between the two surveys. The more recent survey did indicate a slightly greater concern about environmental protection and an appreciation of the Island’s quieter and more peaceful lifestyle was raised more often. In regard to public infrastructure, the focus is still mainly on the ferry, road conditions and public toilets. Similar surveys will be conducted in future in order to monitor the changing community views.

Tourism can impact both positively and negatively on communities – it has the opportunity to enhance or destroy the values on which a community is built. In turn, the characteristics of a community can also impact on the success or otherwise of commercial activity through the visitor experience. Ultimately it is a matter of balance, Bruny Island should always be a place that people come to both visit and live in order to experience the same unique values.

The permanent residential population is likely to remain relatively small, with only about a third of the dwellings being permanently occupied. This makes for a very different community – one that will always be characterised by visitors (shack owners and tourists) passing through and having extended stays within the local community. The pressures and demands this places on a relatively small island community must be managed in order to avoid congestion and public safety issues during peak periods.

In August 2009, a research paper, *Community perceptions on the impacts of tourism on Tasmanian communities* was released by Tourism Research Australia. It examined the perceptions of residents within five separate communities towards tourism. Surveys were conducted in Dorset, Richmond, King Island, Flinders Island and Bruny Island. These results are shown in Table 2. They indicate that the Bruny Island community has quite a different attitude to tourism compared to other Tasmanian regional communities.

The other four communities were happier to see further tourism growth and recognised that it would have a positive impact, both personally and on the community more generally. Of these other four, Richmond was the most closely aligned to Bruny Island in that it did not have a majority of residents that “love” tourists.

Response	Dorset	Richm'd	King Is	Flinders	Bruny Is
Responses/population*	118/600	80/501	139/772	211/1055	287/1305
“love” tourists	66%	39%	73%	58%	20%
happy to tolerate tourists	30%	53%	25%	30%	49%
happy to see tourism growth	54%	55%	54%	54%	36%
should be less tourism growth	1%	3%	0%	0%	12%
happy to see more urban growth	85%	64%	90%	86%	46%
tourism has positive personal impact	52%	54%	61%	61%	39%
tourism has negative personal impact	4%	18%	4%	9%	38%
tourism has positive community impact	92%	89%	91%	90%	75%
tourism has negative community impact	0%	7.6%	6%	6%	25%

Source: Tourism Research Australia

*Includes non-resident land-owners

TABLE 2: COMMUNITY VIEWS ON IMPACT OF TOURISM ON TASMANIAN COMMUNITIES (2009)

Bruny Island residents were clearly concerned about the growth of tourism on the Island. In reviewing these figures it is apparent that the circumstances on Bruny would be different to the other localities – re vehicle ferry constraints, the relative proximity to Hobart, the demographic structure, a lower economic reliance on tourism by the retired community etc. Another point to note is that on Bruny, most of the responses would have come from shack owners.

Nevertheless, the conclusion that must be addressed in future planning is the fact that there are community concerns on the Island about the potential growth of tourism and increase in visitor numbers. These concerns lead to frustrations being felt by a significant number of Bruny

residents who feel that their existing lifestyle is being threatened and that existing infrastructure does not have the capacity to cope.

As well as the infrastructure issues that need to be addressed, it is also necessary to consider the future relationships between tourists and the Bruny Island community. There may well be a need to enhance the host-guest interactions and to better connect the tourism experience with the local lifestyle. Many tourists visit a place such as Bruny Island in order to stay a few days and to experience its attractions in more depth. They will want to communicate and mix with local people as opportunities arise.

Such experiences benefit both visitors and locals and should be encouraged – there should be more opportunities for visitors to engage with the Bruny Island community. This is also another reason why visitors need to see the Island as a place where it is best to stay for more than a night or two; and it will also encourage repeat visitation and greater care being taken of visitor facilities and the natural environment. Residents will also become more tolerant of tourism impacts and accept them as being part and parcel of living on Bruny Island.

Future tourism planning will need to take into account the involvement of the resident community in tourism development decision-making processes. The existing concerns about potentially inappropriate tourism developments and the way that they may adversely impact upon the local residential amenity need to be accommodated. This can be ideally achieved if there is an open and transparent process that involves local people in the design of future developments and consultation (through workshops, surveys or information sessions) prior to the statutory development approval process. The developer would need to initiate this process, but Council should provide the appropriate encouragement as well. An early consultation process should result in much fewer later objections.

In the past, it appears that Adventure Bay has had the greatest adverse impact from seasonal visitor and tourism activities. It is the location where there appear to be the most community concerns about sustainable tourism levels and the capacity of public infrastructure to cater for a growth in visitor numbers. Some of these concerns should be alleviated by the relocation of the cruise boat owner/operator to East Cove and the use of the second public jetty.

2.4 PROTECTION OF NATURAL VALUES

The protection of the Island's natural values is an integral part of any land use, economic or development strategy that pertains to Bruny Island. The natural attractions are major reasons why visitors come to the Island and why people choose to live there.

In the past there have been many studies that have examined these natural values and why they are so important. Some examples of the values that have been highlighted in these studies include:

- The visual landscape of Bruny Island offers stunning vistas. It displays the spectacular natural values of the Island, which are particularly characterised by the often dramatic coastlines – ranging from sandy beaches to high imposing cliffs. The Neck itself is an iconic location for which Bruny is well known. These are sensitive locations that can be badly degraded by inappropriate development. Climate change and increased coastal erosion also has the potential to have an impact on these values.
- As an island, the marine life surrounding Bruny Island is of particular significance. There are a wide variety of coastal and estuarine environments and the wildlife is a major attraction for visitors. There are threatened species such as the New Zealand Fur Seal, Southern Elephant Seal, Leatherback Turtle, Spotted Handfish, Live-Bearing Seastar, Great White Shark and migratory whales such as the Southern Right Whale and the Humpback Whale.
- Bruny Island is home to over 150 bird species, including all 12 Tasmanian endemic species. It is regarded as a “hot spot” for bird watching and this is an activity that attracts many overseas and interstate visitors each year. There are a number of threatened bird species (such as the Swift Parrot, Forty-spotted Pardalote, Wedge-tailed Eagle, White-bellied Sea Eagle, Grey Goshawk, Masked Owl and Fairy Tern), plus a number of other listed migratory birds. All of their habitats need to be protected against inappropriate activities, land use or development.
- On land, there are many examples of threatened flora or fauna species that are of high conservation significance. The many different ecosystems on Bruny Island are able to sustain a rich diversity of plant and animal communities and it is the stronghold for several threatened species. The effective management of weeds and feral animals is an ongoing issue that is being addressed by the residents and government agencies. As an island, Bruny does have an opportunity to more effectively quarantine itself from outside problems and present itself as a place that can better protect its important native flora and fauna.

Together with the natural values, Bruny Island is also well known for its rich Aboriginal and European historical heritage. Protecting these heritage values is extremely important. It is also acknowledged that they are often inextricably linked to the natural resources of the Island. This heritage is a special part of Bruny Island’s unique character and a major reason why visitors come to the Island.

Bruny Island has the highest recorded number of native terrestrial mammal species of any of Tasmania’s off-shore islands. Twenty seven of Tasmania’s 34 mammal species have been recorded there and it is also designated as an ‘Important Bird Area’. Feral cats have been identified as a key threatening process for native mammal and bird species and a project is currently underway to eradicate feral cats from biodiversity hot spots in the short term and from across the whole Island in the long term. Such a project will benefit tourism as it is so

dependent on the quality of the natural environment and its wildlife. The project itself is likely to generate a great deal of interest to visitors and in itself provides an interpretation opportunity as lessons may be learnt that can be applied elsewhere.

Tourism has an important stake in the future protection of the natural environment on Bruny Island. The rich combination of spectacular and varied landscapes, diverse vegetation, accessible wildlife and a fascinating heritage, provides many opportunities for education and interpretation. For the tourist it is an opportunity to enjoy some rare experiences, while at the same time learning and understanding the value of the Island's natural attributes.

The need to protect the Island's natural values will inevitably have some significant implications for future tourism development. Constraints will be imposed on where development might occur or how it might be designed in order to reduce the potential impact. These are issues that are normally addressed within the statutory development approval process, however this strategy does acknowledge that tourism on Bruny Island is inextricably linked to a healthy natural environment in order to attract visitors and to provide interesting outdoor activities.

2.5 TOURISM INFRASTRUCTURE

The underlying principle on which this Tourism Strategy is based is a desire to manage the levels of tourism activity on Bruny Island within the capacity of the Island's infrastructure, its natural values and the common desires of both the Island's resident community and visitors.

Upgrading the physical infrastructure is usually a costly exercise and there will always be difficulties in obtaining the necessary funds. The limited funds that are usually available (from governments, Council or industry) should be spent wisely and strategically. The fact that large funding injections will be required for major works, poses a significant ongoing challenge for the Bruny Island community and the public agencies responsible for that infrastructure.

ROADS

The Bruny Main Road is owned by the State Government and extends from Dennes Point to Lunawanna (including Lennon Road from Roberts Point). The road from Roberts Point to Alonnah is bitumen sealed except for that part of the Main Road at "The Neck". The only other sealed roads on Bruny Island are maintained by Council and include the entire length of Adventure Bay Road; the initial part of Cloudy Bay Road; Killora Road and part of the Main Road at Dennes Point; and part of Church Road at Barnes Bay. There is a local community view that all roads within built-up areas (in 50km/hr zones) should be sealed.

All of the other roads on Bruny Island are gravel roads. One of the issues in this regard is the fact that some hire car companies discourage clients from taking their cars on to unsealed roads (by way of higher insurance premiums and exclusions). During 2010-11, the State government provided an extensive upgrade (sealing and repair) of the Bruny Main Road.

These improvements addressed some of the significant road related problems that had been identified in previous years.

One section that was not addressed was the unsealed section of road on “The Neck”. This section of road passes through a particularly sensitive natural area (penguins cross this road each evening) and the difficult topography limits the options for road improvements. The Neck is also a popular tourism destination and there is a need for expanded car parking, limiting vehicle speeds, foreshore erosion works, dune protection, reducing road-kill, and opportunities for improved visitor amenities.

The Parks & Wildlife Service (PWS) and Department of State Growth (DSG) are both implementing a program of construction works that will address these issues at the Neck (including the replacement of the lookout stairway). This section of the Bruny Main Road is being sealed as part of these works.

The more heavily used gravel roads that now appear to generate the most common complaints from the local community are the Bruny Main Road north of Lunawanna, the Bruny Lighthouse Road (within the National Park – noting that it is attracting up to 35,000 vehicles a year), the Bruny Main Road (in the Dennes Point and Bull Bay area), Coolangatta Road and the access road into the popular surfing spots at Cloudy Bay. The concerns that have been raised relate to the condition of these roads and how they are maintained. Both Council and DSG are considering how these roads can be upgraded to a higher unsealed standard.

Obtaining suitable sources of gravel on the Island to maintain these roads has been an ongoing problem. A local gravel source will reduce the need to transport this material over on the ferry. There may be some scope to seal gravel roads that pass through the more densely settled areas in order to reduce dust problems generated by passing traffic. As well as this, there also are some other pressing issues in regard to road conditions on some side-roads which do not necessarily receive a great deal of traffic.

Some roads do not have the capacity to handle the traffic loads to which they are subjected. There are particular instances where this is the case during the peak tourist season. The following locations and circumstances have been identified as the main problems in this regard:

- The section of Main Road at Roberts Point is used for queued vehicles waiting to board the Bruny ferry. The existing marshalling area is inadequate during some peak times and the queue can extend up the road for as much as 2km (forcing people to drive on the wrong side of the road as parked cars are occupying the driving lane).
- On north Bruny, the gravel sections of the Main Road and the Killora Road have long sections that are windy and narrow. Larger vehicles take up too much of the road and there have been many accidents (including one recent fatality).

- The traffic and parking can become congested in the vicinity of the Adventure Bay shop and the Dennes Point café. There is insufficient parking during busy periods.
- That part of Adventure Bay Road in the vicinity of the public jetty and East Cove is congested during the summer period due to the narrow road, limited parking spaces, pedestrians, boat users, tourists and charter boat clients.
- The small parking area at “The Neck” is inadequate to meet visitor needs on busy days and can impede through traffic. This will be addressed by upgrading both the road and the parking area during 2017 and 2018. The stairway to the top of the dune will also be replaced, together with improved access and signage.

TOURISM SIGNAGE

One other issue that relates to the road infrastructure on Bruny Island is the relatively poor or ad hoc placement of advertising and other tourism related signs. This is a problem at a few locations, but is particularly the case at the Adventure Bay Road turn-off at the Main Road and alongside the Main Road at Roberts Point. The advertising and directional signage is unattractive, often illegal and its disorganized appearance constitutes a potential distractive safety hazard.

A whole-of-island approach, consistent with the Island brand, is needed to achieve a more coordinated and consistent approach to signage. This includes interpretation/information and directional signs, as well as controlling and regulating illegal signs. DSG’s standard tourism signs need to be upgraded throughout the Island. Other suggestions have included signs indicating photo opportunities (with improved pull-over bays), distances and times to the main destinations (such as to the Lighthouse or back to the ferry), road conditions (eg Coolangatta Road) and local attractions (such as walking trails or beach access). Ultimately, only authorised signs should be allowed along the roadside.

Accordingly, a tourism signage proposal has been scoped and is being progressively implemented, primarily by the Department of State Growth and Kingborough Council, with the assistance of Destination Southern Tasmania. The original scope of this project entailed the following:

Background investigations:

- *Confirm the involvement and views of all relevant stakeholders and connections with other marketing exercises and infrastructure proposals that are already in place for Bruny Island.*
- *Consultation with local tourism operators and the Bruny Island community in regard to the project proposals and incorporate any suggestions that have merit.*
- *Preparation of Project Plan that incorporates all of the subsequent project components.*

Tourism marketing:

- Consider how roadside signage (together with other visitor way-finding measures) can be incorporated within the overall tourism marketing plan for Bruny Island.
- Develop a style guide for the various forms of tourism related signage on Bruny Island.

Directional signs:

- Review the current condition and appropriateness of all official directional signage on Bruny Island.
- Review the need for additional signage that addresses local public safety concerns.
- Consider the opportunities to 'brand' the directional signs – particularly those at major road junctions.

Tourism business signs:

- Prepare a brochure or similar material that can be circulated to tourism businesses that explains the existing requirements under the Tasmanian Roadside Signs Manual (and for Temporary Advertising Signs).
- Remove all out-dated or obsolete roadside tourism business signs.
- Consider an incentive for businesses that encourages them to use the official tourism business signs – such as providing the structure upon which these signs are placed.

Advertising signs:

- Identify all illegal advertising signage and arrange with the sign owners for their removal.
- Consult with tourism businesses over the prospects for advertising signage within any new pull-over bays before major intersections (see below).

Tourism information signs:

- Identify suitable locations for pull-over bays – both for locating tourism information and advertising panels, and for scenic and rest purposes.
- Design and cost each of the proposed roadside pull-over bays and schedule their future construction.
- Design and install township welcoming signage.
- Identify locations for local interpretive signage – designed to a consistent style these signs or information panels would provide information on natural features or local history – subsequently research, design and install these signs.
- Develop standard signage with appropriate symbols to indicate driving time back to the ferry and road condition. Consider the need for including such information in languages other than English.
- Include complementary information on the Bruny Island marketing website that supports the coordinated signage strategy and develop a mobile phone app that also provides a great deal more information about the attractions and tourism facilities on Bruny Island.

Implementation:

- Identify the cost of completing all of the above mentioned actions, the various stakeholders that would need to be involved and a schedule of implementation.

Most of this program will be implemented during 2017/18 – particularly in regard to the replacement of most roadside directional by DSG, the installation of gateway signage at Roberts Point and the requirement that illegal roadside signs be removed.

ACCESS TO BRUNY ISLAND

The Bruny Ferry is virtually the sole means of accessing the Island and is a critically important component in the lives of every Bruny Island resident and in the visitor experience of every tourist. The constraints and limitations imposed by the ferry's capacity and timetable must be taken into account when considering any economic, social or tourism related matter on Bruny Island. The access constraints of the ferry are critical in estimating future visitor numbers and understanding that there will be growth limits on the size of the tourism industry on Bruny Island.

The ferry (the "Mirrambeena") is used to transport vehicles from Kettering to Roberts Point. It has a capacity to hold about 70 normal sized vehicles on each trip. On most days the ferry makes 10 trips each way – from about 7am to 7pm. During very busy periods it will break with the timetable and carry out a shuttle operation. The ferry does not take bookings and priority is only given to emergency services. A smaller second ferry (the "Bowen") operates during an extended six-month peak period and has a capacity of about 30 vehicles. It commenced in 2015/16 and has had a significant impact on reducing congestion.

The current contractor is the Bruny Island Ferry Company Pty Ltd. The existing ferry service is under contract with the State Government, with this contract expiring in mid-2018. The ferry ticketing costs are subsidised by the State Government in order to allow discounts to apply to seniors and "islanders", which includes ratepayers and permanent residents. They only apply to vehicles of a certain size (under 6m) and freight is not eligible for such discounts.

The annual numbers of vehicles being ferried to and from Bruny Island has steadily increased in recent years. In 2004 it was in the vicinity of 90,000 vehicles per annum and it is now in excess of 120,000 vehicles per annum (with two ferries operating). Over a whole year, the ferry's occupancy is likely to average out at about 50%, however actual usage is very seasonal and varies considerably at different times of the day.

During peak periods, there is considerable congestion and there are long queues for the next ferry at both Kettering and Roberts Point. At such times, the existing marshalling areas can be inadequate and there are significant problems at both of the ferry terminals. Being in the queue and missing the next ferry is a relatively common occurrence at such times. At Kettering, potential visitors will turn away and cancel their planned trip to Bruny Island.

In February 2011, a Legislative Council Select Committee released its report on "*Island Transport Services*". This report received a number of submissions from residents, community organisations, the Ferry Company and DIER. Kingborough Council's submission supported an additional ferry to supplement the existing service during peak periods as well as making necessary modifications to the marshalling areas at Kettering and Roberts Point.

The findings of the Committee were that:

- *the current transport arrangements are not meeting the demand in peak times;*
- *the population of Bruny Island swells from around 600 to 4,500 in the holiday peak periods;*
- *the inadequacy of the current service is having a negative impact on tourism, population growth and economic development on the island;*
- *primary producers are experiencing challenges when transporting stock and time sensitive produce to and from the island;*
- *Hobart CBD would be well placed to receive and dispatch foot traffic to Bruny Island, particularly during peak periods; and*
- *public amenities at Roberts Point are inadequate and the operating times of the kiosk are inconsistent.*

The Committee recommended that the State Government assess the levels of service and explore the options for an additional ferry during peak times; and that the State Government work with stakeholder groups and the Kingborough Council to urgently upgrade infrastructure and public amenities at Roberts Point.

As a result of these congestion problems, DIER has reconstructed Ferry Road at Kettering so that it can better accommodate the peak-period traffic and can safely accommodate the queuing of vehicles waiting for the ferry. An important aspect of this project has been to improve the amenity for local residents, particularly those that live along Ferry Road itself. Local pedestrian, property access and parking needs are provided for. The third lane on the road is designated for queuing when this becomes necessary, although on a few days each year this is insufficient and queues extend quite dangerously out into the Channel Highway.

Similarly, at Roberts Point, there is a need to expand the marshalling area to overcome the issue of queuing back up the road at peak times. There has been a proposal to acquire a parcel of adjoining private land for this purpose in order to facilitate the inclusion of additional parking lanes. There is also a need to provide for improved kiosk and toilets, including a toilet for persons with disabilities, and a covered rest area, children's play area and additional lighting.

As mentioned above, the second ferry is now in service and is helping to meet the demand during an extended six-month peak period. This increased capacity has helped in reducing waiting times – though with an increase in capacity it is just as likely that this will attract more visitors and congestion will not significantly improve. During 2015/16, the two ferries were still unable to cope with the demand on the busiest of days.

It is beyond the scope of this strategy to further explore the advantages and disadvantages of the various ferry options. This strategy can only provide the context within which more detailed investigations can be carried out and further decisions made. Further efficiency improvements during the peak use periods and improved amenities at Roberts Point and Kettering should result in obvious benefits for visitors and residents alike.

These types of issues are currently being considered as part of the current ferry contract review. The State government is investigating the various options that might be available before calling for expressions of interest. An important part of these deliberations is the need to understand the likely future demand that will be placed on the ferry from increased visitor numbers (plus residents, contractors etc) and how reasonably flexible ferry arrangements can best accommodate the expected increase in demand over time.

The Bruny Island airstrip is also utilised for recreational and emergency use. It is also used for tourism flights with a private charter business now operating from this site. Future changes to the Civil Aviation Safety Authority regulations will need to be monitored as they may further constrain the use of this airstrip.

WATER AND SEWERAGE

There are no reticulated water or sewerage services on Bruny Island. Domestic tanks usually provide the necessary water supplies and sewerage treatment and disposal is being achieved by individual systems – either by way of septic systems or small packaged treatment plants. There are no proposals to develop reticulated services on the Island, meaning that any development must provide for its own needs.

At Adventure Bay, Council installed a large water tank alongside the community hall and near the Bowling Club and this system is now maintained and managed by TasWater. Water is pumped from the water table through four spears located near the bowling green. The water table is at about 2.5 metres depth with an estimated flow capacity of about 30 litres per minute (per spear). The water is pumped through an automatic cleaning filter and an in-line ultra-violet disinfection unit to a 220,000 litre (50,000 gallons) tank. The outlet from the tank is designed to retain at least 80,000 litres (20,000 gallons) available for fire fighting. The water is available for water carriers (via two metered outlets) to supplement domestic supplies and for the use of the community hall and public toilets. Any potential depletion of the water table at this location needs to be monitored.

On-site wastewater treatment and disposal systems must be installed for all developments at the developer's cost. In the past there has been an identified need for a "black water" dump site for campervans and in 2013 Council installed such a facility at Alonnah that is adjacent to the Council Depot.

There have been problems with campervans using the composting toilets maintained by the Parks & Wildlife Service (by dumping chemical treated waste that kills bacteria required for the operation of the composting toilets) and this has resulted in the Service now having to pump out all wastewater. The PWS are upgrading a number of their existing public toilets at the Lighthouse, Cloudy Bay and the Neck. It has also been reported that there is the occasional problem of wastewater from campervans being dumped on the roadside.

ELECTRICITY

In the past, Bruny Island has been designated as one of 35 local communities in Tasmania that has poor electricity reliability. This has been a seasonal problem and, like most other issues, additional capacity is required to cope in peak activity periods and at high use areas such as Adventure Bay. Aurora has installed generators to be operated in periods of peak demand and this should address most of the previous concerns. There is only a single electricity cable that services Bruny Island (from Tinderbox) and TasNetworks has been investigating whether an additional connection is necessary in case of an emergency and in order to replace the need to use generators.

A secure electricity network is essential as it provides for the safety and resilience of the Island community and all visitors. There are of course opportunities to develop alternative energy supplies on the Island (eg solar or a wind turbine as was the case at the Bruny Health Centre – which has been removed), either as stand-alone units or as part of the grid.

It is possible that any new larger development on the island could consider such alternative energy sources in order to not exacerbate any existing limited capacity or reliability issues. A pilot project is currently being developed that will enable 40 residences on the Island to have solar power generation and storage. This attracted a great deal of interest and it is evident that opportunities to utilise alternative energy sources on Bruny Island should be more fully explored in future.

TELECOMMUNICATIONS

There is abundant anecdotal information that supports the view that mobile telephone coverage on Bruny Island is poor. This is a particular problem in the most southern parts of the island. Public phones have been removed and concerns have been expressed about there being insufficient telephone coverage in emergency situations. Telstra has upgraded mobile phone coverage on the Island but there are still a number of blind spots which would be critical in emergency situations. There are three mobile phone towers on Bruny (two Telstra and one Optus) and no single provider seems to have exceptionally strong coverage across the whole Island.

The NBN is available on the Island is by way of satellite (which will improve over time), although there is some limited access to wireless if there is a line of sight to NBN towers on the mainland. The availability of the NBN facilitates increased opportunities for small and home-based businesses to operate on the Island. Nevertheless, internet access is often reported as quite poor and not as good as most other places. This does constrain tourism businesses.

PUBLIC MARINE FACILITIES

Public jetties under Council's control are located at Adventure Bay, Lunawanna, Alonnah and Barnes Bay. Public boat ramps under Council's control are located at Adventure Bay, East Cove, Lunawanna, Alonnah, Simpsons Bay, Barnes Bay and Dennes Point. MAST is responsible for the jetty at Dennes Point. The Friends of North Bruny have indicated that the extension/upgrading of the Dennes Point jetty would allow larger tourist ferries to access the area and support the local tourism businesses. The impact on, and the capacity of the existing land-based infrastructure (eg roads, parking), would need to be assessed as part of any upgrading of marine infrastructure.

Being an island, access to the water is regarded as particularly important and most of these facilities are reasonably well used. The standard of the facilities varies and they are periodically upgraded. There has been recent work to improve boat ramps at Simpsons Point and East Cove, as well as the Alonnah pontoon facility (which also includes other foreshore improvements). Work is required on the boat ramp at Dennes Point. A new public jetty has been constructed at East Cove.

The actual use of the facilities is controlled by the *Kingborough Council Marine Facilities By-law 2011*. This is a mechanism for ensuring that the use of marine facilities meets appropriate public access, safety and amenity standards. It deals with issues relating to unimpeded public access, possible damage to the facility, inappropriate use and the ability to use a marine facility for a commercial purpose.

WASTE DISPOSAL

Kingborough Council operates a waste transfer station on north Bruny. Local residents deposit their rubbish there and many use a private contractor to regularly collect rubbish from their homes. There is no kerbside collection service on Bruny Island.

A particular concern on the Island is the extent of illegal rubbish dumping on the roadsides. This appears to be more prevalent as tourism numbers increase. Council's roadside maintenance service removes any litter and it is, on the whole, not a major problem.

There are limited public rubbish bins and those that do exist are quickly filled. It is normally expected that visitors will take their rubbish home with them. It is frequently mentioned that Council should provide more rubbish bins or skip bins for public use. The concern in this regard is that they will be used well beyond their capacity by residents (eg shack owners) as a free rubbish disposal service.

Council is reconsidering its policies in regard to waste management and it is proposed that a new strategy be developed that includes more integrated solutions – which in the case of Bruny Island would need to address the littering problems and review current domestic waste disposal

arrangements. A waste strategy for Kingborough is to be prepared early in 2017 and its application to Bruny Island will need to adequately respond to both the needs of residents and the tourism pressures the Island is experiencing.

PUBLIC TOURISM ATTRACTIONS AND FACILITIES

A particularly important tourism feature on Bruny Island are the many different public reserves, walking trails, camping grounds, roadside pull-overs, look-outs and recreation areas. These all provide opportunities for the visitor to enjoy what is so special about Bruny Island in that they provide the necessary access to its natural environment. These public facilities are usually either managed by Council or the Parks and Wildlife Service. They are often very well used and require a reasonably high level of maintenance. There are frequent calls for new or improved facilities.

An effective management regime is required to ensure that foreshore reserves and other parks are not damaged from over-use and it is often necessary to rehabilitate damaged areas or clean up after rubbish has been left behind. Regular inspections are required during the peak season.

There is often a call for more or improved public toilets. Public toilets are located at various locations around the Island – such as at Roberts Point (DSG), Dennes Point, Adventure Bay, Alonnah (service centre and community hall) and Lunawanna hall (Council) and the Neck, Quarantine Station, Lighthouse and Cloudy Bay (P&WS). These facilities are each quite small and sometimes struggle to meet the demand in the peak season. Tourists will of course also use the toilets and amenities at the various commercial establishments that they are visiting. It has been identified that additional facilities are required in Alonnah, Barnes Bay and Adventure Bay. Council installed new public toilets at Alonnah (just up from the pontoon marina) in 2017.

The Parks and Wildlife Service is responsible for most of the higher profile recreational facilities – including those that were previously within the State Forests – including walking tracks, camping grounds and in particular at the Neck. During 2017 and 2018 a major revamp of the Neck facilities will be implemented – including the replacement of the main lookout, new toilets and parking area and refreshed interpretive material. The main road will also be sealed and will incorporate protective measure for the penguins.

2.6 EMERGENCY MANAGEMENT

Council is in receipt of a report from Climate Planning Consultants entitled 'Bruny Island Hazard Communication and Risk Study' (Burton and Portanger, 2016). The report was prepared to help Council understand and manage the unique issues associated with an island community. The consultant interviewed residents, businesses and those working in emergency and related services.

The main natural hazards were identified as being bushfire, storms and strong winds, tsunami, coastal hazards (storm tides and coastal erosion), heatwaves and drought, and landslip. The community and visitor awareness and response capacity was assessed. The need for good communication and being able to inform people before and during an emergency was highlighted.

There are some concerns about that community's capacity to deal with emergencies. These issues are often quite unique to Bruny Island and included:

- The threat of bushfire is the most significant hazard and almost all the Island is bushfire prone. Bushfires in the past have been relatively localized and the main risk is if there are fires on the mainland at the same time (with few resources to assist on Bruny) and they are occurring (as would be expected) during the peak visiting time. Alonnah has been identified by the TFS as a safe place and has a Bushfire Protection Plan.
- Storms regularly occur and the western side of the Island frequently experiences strong winds. Hazards include trees and branches falling on roads (which would be a problem during a bushfire).
- The risk of a tsunami is low but the effect would be catastrophic. A major earthquake in New Zealand would result in a tsunami reaching Bruny Island two hours later and this raises issues about the ability to provide adequate warnings.
- There are a number of other natural hazards that will need to be addressed but, in the main, they are not particularly relevant to tourism or the need to issue warnings to visitors (apart from the occasional heatwave).

The main action in response to these types of hazards is to ensure that there is an effective communication mechanism in place to alert visitors to the potential risks. This is also the case in regard to other matters that may go awry – such as a ferry breakdown, road accidents, mobile phone black spots and an unreliable electricity supply.

Of these, the one that causes the most regular concern is the fact that there many vehicle accidents. They have been gradually increasing over time (reflecting the increased visitor numbers) and most occur during summer. The main reasons have been inattentiveness, road defect, inexperience and speed. The local community has been under pressure to provide sufficient volunteers that can respond adequately to such accidents as part of the SES. This is also the situation for bushfire events. The absence of any forestry activity on the Island has further depleted the community's capacity to respond to bushfire.

Apart from natural hazards, the main emergency situation that does occur on the island is the fact that there are relatively frequent motor vehicle accidents. As well as this the unreliable electricity supply, mobile phone black spots and poor internet all create issues where an

emergency situation can be exacerbated (and which would, even on their own, be a real inconvenience).

The recommendations in the report included the following:

- (1) Given the fact that there are three distinct community groups on the Island (permanent residents, shack owners and visitors), each require a specific communication approach and messaging.

Permanent Residents – the messages should focus on community preparedness, encouragement to volunteer and to follow TFS directions online and in print resources.

Shack Owners – the messages should focus on requirements for yard maintenance during the bushfire season and the distribution of risk information to visitors who stay at their property.

Visitors – the messages should focus on multi-language flyers about the hazards, challenges with being on an island during recovery, relevant contact numbers and websites for hazard information and what to do or expect during an energy outage.

- (2) As well as the above, Council should consider creating an emergency hazard guideline (with locally specific risks and issues) for Bruny Island.
- (3) Council should explore the possibility of restricting development in areas where the bushfire risk may be so high that new development should not be approved.
- (4) Undertake a bushfire scenario with other agencies on Bruny Island to identify any potential challenges.
- (5) Lobby TFS for a Bushfire Mitigation Strategy for Bruny Island and for community fire training.
- (6) Develop a water security strategy for Bruny Island. Work with TasWater to undertake a risk assessment of the potable water supply (considering climate change, visitor increase etc).
- (7) Work with TasNetworks to better understand electricity/security issues. Explore opportunities to promote renewable energy and storage systems.
- (8) Review whether the Alonnah Hall is viable as an official evacuation centre on Bruny Island.

- (9) Identify potential to engage with commercial accommodation providers.
- (10) Explore grant opportunities to facilitate the development of innovative (non-tourist) industries on Bruny Island.
- (11) Work with emergency agencies to promote the importance of volunteering on the Island.
- (12) Prepare communication material for the residents, shack owners and visitors.
- (13) Consider the possibility of supporting a shuttle bus on the Island during peak times in order to reduce vehicle demand.
- (14) Undertake coincident flood mapping for Adventure Bay.
- (15) Work with UTAS and other universities to identify suitable Bruny Island projects for climate change adaptation and resilience.
- (16) Review and consider implementing the BART emergency system mobile app.

The response capacity on the Island can be summarised by the fact that there is one resident police officer, a volunteer SES unit (with a diminishing and ageing workforce being a real problem), volunteer fire fighters (two units and two stations – north and south), a volunteer ambulance service (two ambulances – north and south – with helicopters used if necessary) and the Community Health Centre can provide only a very limited medical service during emergencies.

The Island community is a strong, well-connected community with a large number of very active local community organisations. While this provides a strong informal capacity to respond to an emergency, there is no predetermined set of procedures or understanding of specific responsibilities that would be appropriately described in an emergency management plan that addresses Bruny Island's unique circumstances. This is important for a tourism destination that, for about 6 months of the year, will have many more visitors than local residents on the Island. Very few people would be aware of what needs to be done in an emergency.



3. TOURISM OVERVIEW

The last decade or more has provided many challenges for the Australian tourism industry. There has been a slow recovery of the global economy following the Global Financial Crisis in 2008-09. Economic growth continues to remain below trend for most other economies that are important for tourism.

However the last few years has seen stronger growth. During 2015-16, this growth has seen an increase of 10% in international visitors (7.25 million) and an increase of visitor nights of 5% (248 million). Total expenditure from international visitors saw an increase of 15% to \$25 billion.

The strong A\$ has in recent years provided challenges for inbound tourism as it encouraged Australians to take their holidays overseas. While there has been a recent tourism recovery (and the value of the A\$ has fallen), Australians are still taking less long holidays and tending to take more shorter “stress breaks” to balance their increasingly busy work lives. They bank their leave entitlements and typically take a longer overseas holiday every three or four years.

Other global and Australian trends that will significantly impact on the tourism industry include:

rising fuel prices due to increasing scarcity and global action on climate change;

increasing affluence in major emerging markets such as China (in particular), India, Indonesia and South America;

increasing environmental awareness, including the impacts of tourism;

an ageing population; and

significant changes in how potential travelers access information to support travel decision-making.

According to Tourism Tasmania's Tasmania Visitor Survey (TVS), the State hosted a total of 1.17 million visitors for the 2015/16 year, up 2% from 1.15 million for the previous year. The total nights for visitors to Tasmania increased by 5% to 10.2 million for this year. Visitor expenditure increased by 9% to \$2.05 billion. The number of interstate visitors increased by 1% to 997,800 (TVS Sept 2016).

International visitors to Tasmania increased by 13% (being 224,100 for the 2015/16 year), compared to a national trend of a 10% increase (being 7.25 million). For international visitors to Tasmania, there were increases in the number of nights (5%) and expenditure (15%). Thus, there were more international visitors to Tasmania than the previous year and they have been spending more.

In terms of visitor numbers from Tasmania's key markets, Victoria decreased by 1%, New South Wales increased by 2% and Queensland decreased by 2%. Holiday visitors have increased by 7% and holiday expenditure increased by 7%. Those who came to visit friends and relatives (VFR) increased by 4% and VFR expenditure remained much the same as the previous year.

Relatively speaking, a preference for holidaying in Tasmania has remained reasonably healthy, compared with the rather soft national trends. The results for Tasmania in the last year have been very promising though it has been evident that some regions or local areas have experienced the tourism growth significantly more than others.

All of the regional areas in the State have experienced an increase in interstate and overseas visitors during the last few years (following declines in previous years), with southern Tasmania seeing the highest rate of increased visits. South of Hobart, the Huon Trail Touring Route has experienced a 15.5% increase in visitors in 2013, an 8% increase in 2014, a 12.2% increase in 2015 and an increase of 18.1% in 2016.

According to Tourism Tasmania, overnight intrastate activity (travel by a visitor in their home state on holiday trips) increased by 1% in 2015/16. The number of intrastate day trips increased by 14%. The total spent by overnight intrastate visitors in Tasmania decreased by 1% to \$362 million. While there is a general trend for visitor numbers to have significantly

increased in the last 12 months and that people are generally staying longer and spending more, this is much more the case for the region south of Hobart and particularly Bruny Island.

In 2013 it was found that the tourism sector in southern Tasmania is estimated to generate \$973.4 million in annual economic output (REMPPLAN, 2013). Almost half of this is spent on “accommodation and food services”. For every dollar of direct expenditure by visitors to southern Tasmania, the broader local economy is estimated to benefit by a further \$0.90. Taking this into account, tourism in the region in 2013 supported 12,922 jobs (or 13.4% of all employment). Three years later, these figures would now be significantly more.

In March 2014, Destination Southern Tasmania (DST) released its Destination Management Plan (DMP). DST aims to increase visitation, yield and regional dispersal through marketing, industry development and advocacy. The DMP sets out a vision for tourism in southern Tasmania and a framework for DST to continuously manage the regional destination in a more holistic manner. A comprehensive action plan constitutes the main part of the DMP – with many actions directly relevant to Bruny Island. The actions variously focus on improving accessibility, providing the necessary infrastructure, developing new product, facilitating a greater service culture and building the capacity for destination marketing (Lebski, 2014).

The public and industry consultation that was carried out as part of this DMP identified the following key gaps in infrastructure (which the above actions are intended to address):

- *Road infrastructure, particularly outside metro areas*
- *Accommodation development outside of Hobart*
- *Signage across the region*
- *Public transport or the lack of it across the region*
- *Wifi and telephone coverage across the region*
- *Improved public infrastructure, such as laybys, public toilets and recreation areas*

The actions that relate to this Bruny Island Tourism Strategy’s focus on public infrastructure include the following (noting there are many other actions that directly relate to tourism industry development and marketing that are also relevant to Bruny Island):

Action 2 – With DIER and Local Government, undertake a comprehensive review of the region’s signage with three key objectives: ensuring correctness of existing tourism and directional signage, removal of illegal and misleading signage and a review of signage guidelines to allow operators to erect signage in a strategic and controlled manner.

Action 3 – DST to work with DIER in reorienting DIER’s focus – i.e. road signage (including reassurance signage), stops/layovers and roadside facilities are important to the quality of the visitor experience.

Action 4 – DST to work with DIER and Local Government to improve road infrastructure, particularly in relation to Huon Valley, Tasman and Central Highlands areas.

Action 6 – DST to lobby the State Government and service providers to improve public transport access for visitors to tourism clusters and attractions in the region.

Action 9 – DST to lobby the State Government and service providers to increase the availability and coverage of free wifi and telecommunication networks across the region.

Action 19 – DST to work with all stakeholders to develop the use of the regional waterways as an alternative access to tourism attractions and accommodation, events and connection to Hobart.

Since mid-2016 both Kingborough and Huon Valley councils (together with the local tourism industry association) have commissioned DST provide destination marketing of the region south of Hobart. New marketing plans for Kingborough and Huon Valley will be prepared and the whole region will be marketed under a new “brand” that replaces the former *Huon Trail*. These arrangements will enable a much greater emphasis to be placed on the promotion of Bruny Island as a destination in its own right.



4. TOURISM ON BRUNY ISLAND

4.1 VISITORS TO BRUNY ISLAND

TVIN data from the last few years indicates that the number of international and interstate visitors to Bruny Island has increased steadily. In 2002, Bruny attracted 29,400 interstate/international visitors or 5 percent of all visitors to Tasmania. In 2016/17, 147,807 interstate and overseas visitors came to Bruny Island, a 13.9% increase on the previous year, and representing 11.6% of all visitors to Tasmania – a larger proportion than previous years. In that time, the total number of visitors (aged 14 or over) that stayed overnight grew from 11,246 in 2002 to 45,634 in 2016/17. More detailed trends are indicated in Table 3 below.

The figures in Table 3 are updated when the June figures for each year are available so that comparisons can be made for the whole of a financial year and the single peak summer period is included in each set of figures. They indicate that visitor numbers to Bruny Island have been usually increasing each year at a faster rate than has been occurring in Tasmania as a whole.

	2007– 2008	2008– 2009	2009– 2010	2010– 2011	2011– 2012	2012– 2013	2013– 2014	2014– 2015	2015– 2016	2016– 2017
Number of international & interstate visitors	61,400	75,500	75,100	69,000	71,799	77,389	84,701	101,190	129,762	147,807
Percent increase on previous year	13%	23%	-0.5%	-8%	4.1%	7.8%	9.5%	19.5%	28.2%	13.9%
Percent of total Tasmanian visitors	6.7%	7.8%	8.2%	8.0%	8.4%	8.0%	8.0%	8.8%	11.1%	11.6%
Total number of visitors who stayed overnight	23,000	23,000	21,700	21,200	22,681	27,281	28,418	32,666	43,185	45,634
Total number of visitor nights on Bruny	60,900	63,900	69,800	52,200	62,419	74,441	75,492	83,466	107,115	119,908
Average length of overnight stay (days)	2.6	2.8	3.1	2.4	2.8	2.7	2.7	2.6	2.5	2.6

SOURCE: TASMANIAN VISITORS SURVEY (TVS) – TOURISM TASMANIA

TABLE 3: INTERSTATE AND OVERSEAS VISITORS TO BRUNY ISLAND

The peak summer season of 2016/17 was particularly busy and visitor numbers again increased more than in previous years. This can be partly attributed to both the additional capacity a

second ferry provides as well as the island's natural appeal. There is no doubt that Bruny Island's popularity is continuing unabated. Visitor numbers are increasing by about an average of 20% each year.

This increase was matched by the number of visitors that stayed overnight – with the total number of 45,634 being an increase of 5.7% from the previous year. There was 23,000 overnight stays in 2008 and this has been reasonably steady, until the last few years when it has more quickly increased to 45,634 in 2016/17. The total number of overnight stays on Bruny also increased significantly in the last year up to 119,908, which is twice as many five years ago.

A comparison of the visitor numbers for Bruny Island can be made with other southern Tasmanian destinations. This is indicated below and shows that the recent rate at which the visitor numbers have grown in recent years compares very favourably with other southern Tasmanian destinations. Bruny Island has proven to be a consistently popular tourism attraction with all indicators exhibiting significant growth.

Place visited	Bruny Island	Percent increase	Hobart City	Percent increase	Huonville	Percent increase	Port Arthur	Percent increase
2011/2012	71,799		617,304		129,752		167,833	
2012/2013	77,389	7.8%	699,046	13.2%	145,486	12.1%	164,630	-1.9%
2013/2014	84,701	9.5%	763,244	9.2%	144,956	-0.4%	198,688	20.7%
2014/2015	101,190	19.5%	854,433	11.9%	156,057	7.7%	213,494	7.5%
2015/2016	129,762	28.2%	853,333	-0.1%	165,184	5.8%	230,338	7.9%
2016/2017	147,807	13.9%	919,015	7.7%	169,162	2.4%	259,607	12.7%

Intrastate visitor numbers to Bruny are not available. It is estimated that the total number of intrastate visitors would have grown each year in a similar manner to that described above, but would be proportionally less than the total international/interstate totals. A 1998 survey found that 71,800 Tasmanians visited Bruny Island, but since then no other similar surveys have been conducted. In another study, it was suggested that a reasonable estimate for the total number of annual visitors (international, interstate and intrastate visitors in 2009/10) would be in the order of 115,000 to 125,000 (SGS Economics and Planning, 2010) – so this would probably be well in the order of 200,000 in 2015/16.

An indication of the origin of international and interstate visitors (by country) is shown in Table 4 below. The vast majority of tourists visiting Bruny Island are from mainland Australia. Asian visitors make up a relatively small proportion and it is expected that this is likely to grow in future years. Not surprisingly, most visitor pressure occurs in summer from December to April. Visitor peaks occur during the days around Christmas, Australia Day and Easter when tourist visits coincide with those of holiday homeowners.

ORIGIN OF VISITORS TO BRUNY ISLAND BY COUNTRY		
Country of Origin	% during Oct 2013 – Sept 2014	% during Oct 2014 – Sept 2015
Australia	77.8	82.5
New Zealand	1.1	1.1
United States and Canada	3.2	2.4
United Kingdom	3.4	1.8
Germany	2.4	3.3
Total Other Europe	4.8	4.8
Hong Kong	3.3	0.8
China	1.2	0.5
Singapore	0.7	1.0
Total Other Asia	2.1	1.6
Other Countries	0	0.2
Total Visitors	74,989	93,367

SOURCE: TASMANIAN VISITORS SURVEY (TVS) - TOURISM TASMANIA

TABLE 4: ORIGIN OF VISITORS TO BRUNY ISLAND

Bruny Island is becoming increasingly popular and holiday accommodation on the island has grown considerably in recent years. Many people do consider Bruny Island as being worthy of more than only a day trip. It is likely that the significant increase in overnight stays from visitors has supported a demand for more holiday accommodation. This increasing interest in staying on Bruny Island for a number of days has been an important factor in providing the opportunities for other businesses to provide additional services on Bruny.

Despite this increased demand, the number and standard of accommodation providers on the Island may be insufficient to gain the greatest yield from current and future visitor numbers. There have also been issues in the past with holiday-home owners promoting their properties as visitor accommodation, without the necessary approvals in place and in some cases damaging the Bruny brand with poor visitor amenity. There are very few accommodation providers that can cater for larger groups of visitors.

4.2 TOURISM BUSINESSES ON BRUNY ISLAND

A list of tourism businesses on Bruny Island has been compiled from a list of registered businesses held by DST and those accommodation permits granted by Kingborough Council (see attached Appendix). It is difficult to be definitive in regard to the actual numbers as new

businesses are always being established and others are closing down – particularly accommodation providers.

	Accommodation	Attractions and Food
North Bruny	20	8
South-east Bruny	21	4
South-west Bruny	38	5
Whole of Bruny	1	3
Total	80	20

TABLE 5: TOURISM BUSINESSES ON BRUNY ISLAND

It is acknowledged that there are a number of other businesses on the Island that are not normally associated with the tourism industry (eg general store). These other businesses also still derive a considerable proportion of their business from visitors.

Table 5 indicates that there are (about) 80 commercial accommodation businesses on Bruny Island – almost all of which are self-contained holiday cottages or cabins and bed & breakfasts. The capacity of these establishments is 400, plus 80 caravan/camping sites with a capacity of 240 persons as well as informal camping sites provided by Parks and Wildlife Service. Total capacity for commercially provided accommodation is therefore in the order of about 700.

It is expected that the popularity of Bruny Island will continue to drive the growth of new accommodation establishments in the future. There has been a steady increase in the start-up of new tourism businesses and a number of recent upgrades of existing businesses. As previously indicated, one constraint will be the availability of local people able to be employed as staff at these businesses.

Tasmania, as a whole, has seen a gradual growth in the interstate caravan and camping market over the last 5 years with about 30,000 campervan type vehicles being either rented or brought over from the mainland (Tourism Tasmania, Web Reporter). This sector is likely to continue to grow and signs of this include a substantial increase in campervan/motorhome registrations in Australia during the last twenty years (about a 300% increase) and the rapid increase in membership of national caravan and motorhome associations. Appropriate infrastructure is required to meet the needs of this sector and reduce potential impacts on the environment. This includes waste dump-stations (as available at Alonnah) and designated overnight stay areas with access to potable water.

The statistics in regard to tourism businesses are interesting from a Bruny Island perspective. A few years ago a comparison was made with other areas in Tasmania. Using a conservative estimate of 50 tourism businesses on Bruny, this was compared with a total of about 120 for the whole of Kingborough. If it is assumed that the population of Bruny Island is 800, then there is 1 tourism business for every 16 residents. The comparison with other municipalities was that the number of residents per tourism business is 320 for the whole of Kingborough, 168 for Huon

Valley, 215 for Hobart, 51 for Tasman, 49 for Glamorgan Spring Bay etc. The conclusion was (and probably still is) that business activity on Bruny Island is dominated more by tourism than any other area in southern Tasmania.

In recent years, visitors to Tasmania are more likely to have heard of Bruny Island and this has been largely due to the promotional efforts of Bruny Island Cruises. This particular business has grown significantly from 2007, to the extent that it provided for about 20,000 passengers in that year, with this figure quickly doubling and then continuing to grow each year afterwards. In recent years a number of other tourism attractions (mainly food and beverage related) have also generated considerable media attention and contributed significantly to Bruny Island's popularity.

4.3 TOURISM MARKETING

Up until 2016 and during the previous 10 years, Bruny Island has been incorporated within the marketing program of the Huon Trail (which encompasses both of the Kingborough and Huon Valley municipalities). An annual brochure is printed and circulated and a website provides details of the attractions and tourism services on the Island. Various advertising features are also produced both in regular publications or as opportunities present themselves.

On Bruny Island itself, the Bruny Island Tourism Association (trading as Bruny Tourism Inc.) also produces a brochure and a website (www.brunyisland.org.au) that complements their Huon Trail equivalents.

During 2016/17, changes are being made to the way Bruny Island is marketed. Marketing under the Huon Trail brand has been phased out and Destination Southern Tasmania (DST) will oversee a more "destinational" approach that is based on the particular attractions on Bruny Island – that is a branding that can be more readily identified with the actual destination. DST will prepare a marketing plan for Kingborough that incorporates the needs of Bruny Island.

This will inevitably generate a re-think as to how Bruny Island can be marketed as a whole. This should also form part of the tourism signage project that is mentioned in section 2.5 above. There have been some recent workshops facilitated by DST that provide some direction to the messages that need to be communicated when marketing Bruny Island. Those workshops identified that visitors to Tasmania are seeking new or "iconic" experiences – particularly in regard to food and beverages and nature based activities – and this is why Bruny Island is so popular. This needs to be built upon, both through future marketing efforts and the tourism product that is provided on Bruny.

It was felt that what needs to be marketed should be in synergy with the competitive advantages that the market understands the destination offers – "where image and identity aligns". To be competitive, Bruny Island needs to be identifying and promoting its "competitive advantages" or "points of difference".

How Tasmania is being marketed by Tourism Tasmania matches Bruny Island's attractions quite well. The Tasmanian brand refers to the south of the State as having an "unconventional offbeat charm; eclectic artists and passionate food lovers; engaging festivals" and "the south is a window into the past with powerful stories below the surface". Visitors are looking for an "experience" – it must be much more than just going for a drive. In order to attract visitors in the first place, they need to know what to expect. However we also need to match what we have to sell with what the visitor wants.

Marketing the area is a competitive exercise. It needs to focus on what will cut through to the potential visitor and different techniques may need to be used compared to our competitors. The development of any such marketing program is however constrained by limited resources and skills, local parochialism and a lack of knowledge within the market about the destination. What will make the area a "must see" destination? How will the visitor experience a "rich journey of discovery" and be prepared to stay there for a few days?

Some suggestions as to what is truly different about this area are that it has unique natural values (both on land and on water), the value-added local produce and an authentic experience (many stories to tell and strong links to the past and the natural environment). It is also worth noting that way Bruny Island is branded or marketed can be aspirational as well – indicating where we want to be in say 5 or 10 years' time. There is an opportunity to leverage off the popularity of Hobart and build a connection that promotes visitors needing to spend a few days in each and seeing what's best of Tasmania.

It is now proposed that a marketing plan for Bruny Island be developed and some features of this plan are expanded upon in subsequent sections.

4.4 BRUNY ISLAND DESTINATION ACTION PLAN

The Bruny Island Destination Action Plan (DAP) was completed in August 2016 and was an initiative of the Department of State Growth. It is one of many similar plans that are being prepared across the whole of Tasmania and, in this case, was facilitated by Destination Southern Tasmania (DST). The process brought together representatives from all stakeholder groups that contribute to and benefit from the visitor economy, local government, state government agencies and the community (residents and business) to develop the Plan.

The Plan itself identifies specific priorities and actions to be implemented over a three year period. It does not purport to be a comprehensive strategic plan for the island, but identifies the key challenges and opportunities. It complements this Bruny Island Tourism Strategy by identifying a number of actions that can help in meeting these challenges and opportunities.

It aims to further develop the quality of the visitor experience, which is based primarily on the Island's natural environment and cultural assets, while managing and minimising the impact of visitation. The priorities and actions are therefore focused on maximizing visitor expenditure,

length of stay, dispersal and satisfaction and not on increasing visitor numbers. Therefore the priorities and actions focus on improving the visitor experience and positioning the Island as a quality nature based, heritage and living cultural destination with supporting infrastructure, products and services consistent with the demand and aspirations of specific interest target markets, rather than mass markets. Targeting higher spending visitors and offering appropriately priced quality products and services will act as a brake on volume visitation growth. This will require engagement and cooperation with DST and Tourism Tasmania to develop and implement a strategically targeted cooperative marketing plan.

The key objective of this DAP is to progressively develop the visitor infrastructure, product and services to competitively deliver the visitor experience expectations of higher spending target markets.

The Actions contained within the DAP have been incorporated within this Strategy. They are embedded within the various categories listed in later sections that include all of the Actions drawn from both this Strategy and the other relevant plans for Bruny Island.

4.5 BRUNY ISLAND PLACEMAKING AND VISITOR ENGAGEMENT

A pilot project was commissioned by the Department of State Growth in 2015/16 to trial a 'placemaking' process to help improve visitor and local experience on Bruny Island. "Visitors often search for moments and activities from the perspective of a local, aiming to gain a glimpse into the lifestyle of the people who call this place home. In this vein, creating a quality visitor experience is inherently about reflecting core community values and enhancing or providing what makes it special" (Living Well, 2016).

The report says that "Bruny Island is characterized by a sense of remoteness – derived from its dramatic coastline and rugged, windswept wilderness – that has drawn and nurtured a passionate, caring and connected community who want visitors to share in the unique stories that underpin the character of the place".

There are many aspects of the visitor and local experience that are currently successful and working well. These need to be well supported into the future. The report also identified that there are also challenges (or what is not working so well) that also provide opportunities "to create a cohesive experience that blends the needs of locals with the needs of visitors". These include such aspects as:

- Community volunteers struggle to provide the necessary emergency services during the peak tourism season – exacerbated by unsafe driving on unsealed roads.
- Lack of visitor understanding of the size of the island and driving conditions.

- Limited visitor access to locals, including an understanding of Aboriginal history and culture.
- Limited visitor amenities such as public toilets and rubbish bins.
- A perception that residents don't benefit sufficiently from the visitor economy.
- Limited ability to age in place due to constraints of a small community being able to support aged care services and facilities.
- Poor ferry departure and arrival experience with lack of access to information about the Island.

The opportunities for Bruny Island were identified as being:

- Prioritise community and social infrastructure – eg pool community resources and consider amalgamating community organisations with a shared portfolio; provide shared commercial facilities and co-working spaces; and provide tools and equipment for common use by artists and hobbyists.
- Building the community's capacity – eg expand the Adventure Bay market; engage more with 'shackies' to build community collaboration; host summer night events; create visitor volunteer programs such as local building projects; build local community capacity in sourcing and applying for grants (including crowd-funding); provide digital and physical collateral about 'what's on in Bruny' at the ferry terminals; cross-connect accommodation, farms, food and tours; come together to create a Bruny shop that sells local produce and products on the main tourist trail; encourage cross-referrals and a readiness to communicate 'local knowledge' to visitors; and encourage younger people to start up new businesses and stay on the Island.
- Movement through the Island and gateway experience – eg encourage communication between visitors at the ferry terminals (such as an opportunity to display a 'favourite places' list; consider a visitor centre, café and produce centre at (or near) Roberts Point; improve the waiting facilities at the ferry terminals; display historic farming machinery or other markers along the main roads as part of an 'eye spy' type game; provide clearer and more distinctive signage; improve information signage at the start of walking trails; fund a regular public bus service during peak periods; create more parking bays along the main road for views, interpretive signs and to rest; consider community owned accommodation and campsites as revenue sources; and occasional high end accommodation at the lighthouse.
- Sharing local stories and dispersing visitor activity – eg develop new arts partnerships (UTAS, Tas Regional Arts and Council); facilitate arts programs at Forestvale and the Alonnah hall; regular indigenous walking tours on Murrayfield; funding assistance to employ more indigenous guides and to conduct workshops with Aboriginal Elders; diversify Murrayfield's offer with bush food and other business opportunities; provide

night wildlife tours and guided walks; improve self-guided walking tracks (better promotion and signage); create a co-op café supported by volunteers; host Bruny gourmet dinners at the Alonnah hall; encourage farm gate self-service roadside stalls; provide a mobile 'made on Bruny' van that travels to camp sites and towns to sell local produce; provide food classes and workshops for visitors; build on the early explorer and settlement stories through displays, designs, art and exhibitions; incorporate such stories in the marketing collateral; and provide greater interpretation of the early French legacy of exploration and first contact.

- Marketing the Bruny Island experience – eg a coordinated marketing campaign that highlights activities and events; embed Bruny events in the Dark Mofo program; market the uniquely different offerings in summer and winter; encourage multi-day visits; provide visitor information on the ferry crossing; consolidate Bruny Island brochures; provide regularly updated community 'what's on' noticeboards; roadside signage improvements (food trail, walking tracks, bike routes, handmade signs, warning re times/distances); and promote wildlife protection.

The Placemaking and Experience Strategy stated that the vision is to “celebrate Bruny ‘islandness’ through story telling – showcasing our people and culture, our coastal wilderness, our produce, our creative scene and our rich layered history” (Village Well, August 2016). The key opportunities that were then identified included:

- The Ferry Experience:
 - shaping the new ferry contract;
 - reimagining the 20-minute journey across the Channel;
 - improving the experience at the Kettering Ferry Terminal; and
 - expand information and artistic opportunities at the Roberts Point Ferry Terminal.
- Connecting Community and Businesses:
 - develop a strong business network;
 - create a 'Community Connections' grant program to incentivise unique partnerships;
 - explore funding opportunities for 'Small poppy Village Grants' that encourage improvements to community meeting places;
 - forge a quarterly grant application information session inviting all community groups; and
 - celebrate and highlight successful Public-Private Partnership projects through information share.
- Summer Resourcing:
 - implement a 'Bruny ambassadors' program;
 - undertake a 'Needs Analysis' for emergency service provisions in peak periods;

- build on the Parks and Wildlife Service's volunteer caretaker program;
- create a roaming local produce store (food truck); and
- explore volunteer project opportunities for experts skills-share, building skills and capacity to improve infrastructure and processes.
- The 'Real Bruny' Brand:
 - develop and circulate "Hello Island: A Local's Guide to Bruny" publication that celebrates the stories and 'islandness' that characterizes the Bruny experience;
 - develop a "Hello Island: A Local's Guide to Bruny" website;
 - refresh the Bruny News template and ensure wider circulation;
 - install a series of 'What's On' noticeboards showcasing local events and activities, that builds on the new marketing materials;
 - encourage businesses to create signage that becomes markers for place; and
 - build on the #Brunymeet Instameet initiative.
- Journey Marking and 'Wayfinding':
 - place sculpture silhouettes (a Bruny Art Trail) in the landscape as roadside navigation markers;
 - prioritise the installation of pull-over bays that allow for interesting information points;
 - place 'farmgate' stalls within pull-over bays, at information points and key sites;
 - run a regular Bruny Community Bus between key destinations; and
 - prioritise road signage that indicates driving times, distances and conditions.
- Experience Centre Pilot Project: Alannah Hall:
 - provide a well-resourced co-working space to encourage visitors to stay longer and for semi-permanent residents to realize a better work-life balance;
 - include flexible, affordable and easily accessible workshop spaces and tools and equipment hire;
 - create a space for a Co-op Café and Produce store;
 - incorporate a commercial kitchen for community use;
 - create and implement a kitchen garden in partnership with the Bruny Island District School and the Co-op Café;
 - ensure a regular program of activities and events; and
 - make this a destination for the arts and cultural community with Gallery and Exhibition spaces.
- Workshop and Skill-Share Destination:
 - create a biannual workshop calendar and database;
 - partner diverse small businesses to create holistic 'learning getaways';
 - create a diverse program of workshops that reflect Bruny's 'stories';
 - provide a platform for visitors and 'shackies' to facilitate skills share workshops; and

- create workshops that appeal to younger demographics.
- Walking Tracks:
 - prioritise the improvement of self-guided walking tracks including the Labillardiere Peninsula Circuit and the Fluted Cape Track;
 - create day-long to week-long walking experiences;
 - promote tracks through self-guided walking guides (booklet and website);
 - create a crowd-funded campaign for the updating of a selected walking track; and
 - create a Citizen Forester Program giving volunteers the opportunity to contribute to the collection of flora (forest) data collection projects.
- Lunnawannalonna Stories and Opening Up Murrayfield;
 - improve funding for weetpoona Aboriginal Corporation to implement visitor program; start a special visitor experience program with T2E; prioritise improvements
 - and access to sites of significant cultural interest, notably the old quarry;
 - establish a Ambassadors program to provide regular guided walks across the land;
 - create a Murrayfield cultural experience;
 - explore the potential for an Indigenous cultural centre, café and native nursery;
 - reimagine broader Indigenous interpretation; and
 - share the Murrayfield story in Bruny marketing collateral.
- Improving the Island's Accommodation Experience:
 - create one or a series of community-owned and managed camping experiences that help fund community initiatives and visitor connection to place;
 - transform successful trial camping experiences into permanent high yield community-owned and managed accommodation experiences;
 - explore private interest through a PPP to create a unique no-electricity and low-impact ecolodge; and
 - encourage existing Accommodation Hosts to enhance their offer.

This placemaking project identified many opportunities that can now be further explored and possibly implemented by a combination of the local community, Council, State government agencies and regional bodies such as Destination Southern Tasmania. The specific opportunities listed above have not been translated into individual Actions within this Strategy and it is proposed that they be referred to as part of other related Actions (such as those included within the DAP).



5. A TOURISM VISION

Any new vision for tourism on Bruny Island would need to strike an appropriate balance between the needs of the visitors themselves, the local Bruny Island resident community and the tourism related businesses. Tourism activities would need to be sustainable in that they would not harm the very qualities that attract people to Bruny Island in the first place and that they should also have a positive impact on the Island's economic viability.

The underlying principle on which this Strategy is based is that there is a need to manage the levels of tourism activity on Bruny Island within the capacity of the Island's infrastructure, its natural values and the common desires of both the Island's resident community and visitors. The social and environmental impacts of tourism on Bruny Island can only be effectively managed if the public infrastructure has the capacity to accept the pressures experienced during the peak tourism period.

Bruny Island should always be a special place that people come to visit in order to experience something different. It is a large island with many unique attractions. These same attractions are the reason why many people choose to live permanently on Bruny Island. Tourism needs to be managed so that the Bruny Island community welcomes tourists and the visitors in turn benefit from experiencing what it feels like living within this Island community. The relationship between the two should be mutually advantageous.

The pressures and demands on this relatively small island community need to be managed in order to avoid congestion, unacceptable site impacts and public safety issues during peak periods. Both the quality of the visitor experience and the lifestyle amenity for residents need to be protected.

Tourism should also be managed so that it is able to contribute to improving the social and economic sustainability of Bruny Island. Increased economic activity enables improved services and local employment opportunities. In some ways it is also able to counteract the Island's ageing demographic by providing long term employment opportunities. Tourism is able to greatly encourage other agriculture, aquaculture and value-added food production activities – each of which build on the growing recognition of Bruny Island's natural produce and gourmet food reputation.

Acknowledging that there are transport or access constraints that prevent a major increase in visitor numbers, the focus should be on increasing the "yield". To do so, visitors will stay longer and spend more. Bruny Island should be regarded as a destination that is best seen over a few days. This approach needs to be implemented through complementary marketing techniques, the availability of multiple attractions (plenty to see and do), a variety of types of available accommodation and a higher quality of public infrastructure that encourages people to take their time and relax. Visits outside of the normal peak periods should also be encouraged to better sustain local businesses and to further increase the overall yield that tourism can provide.



6. BRUNY ISLAND TOURISM STRATEGY

Bruny Island provides a broad range of visitor attractions that are becoming more sophisticated and well known. In recent years, Bruny has been widely promoted on the back of its natural attractions, heritage, food and produce. The quality of the natural environment in particular forms the main attraction for most tourists and other visitors. The Island's dramatic coastline and marine wildlife will continue to be a central plank in any viable tourism industry. It is important that all related tourism activities are conducted in an environmentally sustainable manner in order that continued access can be provided for visitors to experience these world-class attractions.

Bruny Island is quite different to many other tourism destinations. Being an island, there are access constraints and this sense of isolation is both a barrier and an attraction for residents and visitors. Both seek the quieter and less congested character of the Island. In this respect, the ferry limits visitor and resident numbers. On the other hand, the tourism experience is damaged by the congestion that is experienced when a long time is spent in queues at both ferry terminals.

Similarly, the amenity of local residents is compromised if there is overcrowding, poorly maintained public facilities, or roads becoming dangerous because of the number of day-trippers endeavouring to catch ferries. There are few benefits in continually trying to increase visitor numbers in peak periods when there are obvious ferry and other infrastructure constraints – plus there is an increased likelihood of environmental damage and potentially ruining what attracted people to Bruny Island in the first place.

Bearing in mind these underlying issues, the implementation of the Bruny Island Tourism Strategy aims to achieve the following objectives:

increase the economic contribution of tourism to Bruny Island by increasing yield and length of stay;

improve the quality of public infrastructure on Bruny Island to enhance the visitor experience;

promote an environmentally responsible and sustainable tourism industry on Bruny Island;

promote strong connections and frequent engagement between visitors and the Bruny Island community;

develop and market a “whole-of-island” brand and marketing program for Bruny Island that is supported by the community and industry sectors; and to

identify new funding sources that can be utilised to improve public facilities and services that benefit both visitors and residents on Bruny Island.

The implementation of this Tourism Strategy will be achieved by following the strategies and actions that are outlined in the next few sections. They describe a broad approach as to how tourism development should proceed in future and incorporate other related plans such as the Bruny Island Destination Action Plan. The actions (as listed within Section 7) are also assigned priorities and responsibilities are allocated to the respective authorities or organisations. This Strategy is a Council document but, the fact that actions from other plans and strategies are included, means there should also be a degree of ownership from others.

From Council's perspective, it will be necessary to work closely with many other organisations in implementing this Strategy. The government agencies that are involved in tourism related activities each have roles and responsibilities that are referred to in the list of "priority actions". The Parks & Wildlife Service manages large areas of public land on Bruny Island and maintains a great deal of public infrastructure, primarily for the benefit of visitors. It has a considerable stake in tourism on Bruny Island and appreciates the benefits of a more coordinated approach to future visitor management strategies. The Department of State Growth's role is also very important as it is responsible for the Bruny Island Main Road, the Bruny Island Ferry and the associated ferry infrastructure at Roberts Point and Kettering. A close relationship with Destination Southern Tasmania and Tourism Tasmania is also necessary, in order that Bruny Island is marketed in a manner that is consistent with this Tourism Strategy.

Local community groups, such as the Bruny Island Community Association and Friends of North Bruny are important stakeholders and help in representing the views of Bruny Island residents. Other community groups are also likely to be actively involved. The local tourism operators are represented by the Bruny Island Tourism Association and their support for the strategy will be critical. Council is assisted by the Bruny Island Advisory Committee and BIAC will be monitoring the implementation of this strategy and conducting periodic reviews.

6.1 MARKETING THE BRUNY ISLAND EXPERIENCE

Bruny Island, with the physical barrier of the sea and its "islandness", is usually identified as a tourism destination in its own right. However it must still fit within the regional tourism framework that is provided at a municipal level and by Destination Southern Tasmania. It is important that Bruny Island leverages off the marketing efforts conducted through these other means. As indicated in Section 4.3, it is proposed that a destination marketing plan be developed for Bruny Island that complements these other tourism marketing activities.

Tasmania has become 'top-of-mind' as a nature-focused destination within Australia, supported by its produce and heritage. Motivational research conducted a few years ago for Tourism Tasmania identified the strongest appeals for Tasmania were the appeals of 'coastal nature' (81%), 'heritage' (74%) and 'wilderness' (75%). Bruny is very well positioned to capitalise on these attributes.

Sarah Lebski and Associates (2009) identified Hobart as the key to attracting visitors out into the Channel, Bruny Island and beyond. It was found that "the challenge is to build on the

region's reputation as the city's playground, involving a sense of escape and relaxation in a beautiful, contrasting environment".

For Bruny Island itself, it is important that it is marketed in a manner that best influences visitor expectations and attracts visitors who will most enjoy what Bruny has to offer. The marketing strategies developed by local operators should complement those that are occurring at a regional level and this strategy is advocating that this be based on a quality niche product.

The *Bruny Island Interpretation Plan 2008-2011* (Housego, 2008) aimed to improve visitor experiences and provide direction for Bruny Island interpretation. That Plan identified the need to tailor experiences and interpretation strategies so as to support existing and new visitor experiences that encourage longer stays. Although it was prepared some time ago, the interpretation themes or "take-home messages" still provide a good indication of Bruny Island's important qualities. These were:

the natural environment – "Bruny Island might be tiny on a global scale but it's a giant in terms of its richness of natural features";

proximity to Hobart – "Bruny Island is only 45 minutes from a capital city but its lifestyle is a world away";

marine attractions – "The sea around Bruny Island is a place for work, play and survival – even for humans"; and

heritage and history – "The character of this island has been shaped by resilient people over thousands of years".

The Neck to Adventure Bay and East Cove was regarded as the main island destination precinct for the majority of Bruny Island visitors, making it the key interpretive hub for all audiences. The Interpretation Plan recommended that this precinct should be considered a platform for interpretation delivery that connects visitors meaningfully to what is distinctive and most interesting about Bruny Island as a whole. The National Park and Cape Bruny Lighthouse and Dennes Point were considered other opportunities that should be developed and promoted to encourage visitor dispersion around the Island.

More recently (during 2016), Bruny Island has been the subject of a number of more detailed investigations that have attempted to define or assist the development of a Bruny Island "brand" – its "mix of wilderness, food, history, arts and culture and shared community values" (Village Well, 2016). For example, the Island has become well known for value-added food products. These are marketed as being from Bruny and there is the potential to build upon this as more locally grown or processed produce is made available.

It is anticipated that this brand recognition will grow and this will benefit the Island more generally. The primary producers and retailers on Bruny Island may choose to pursue the commercial opportunities that will result from this increased appreciation of a Bruny "brand" and

to pursue opportunities for visitors to experience a “taste” of Bruny. Accommodation and other tourism operators can also then build on this greater brand recognition.

From a tourism perspective, the most effective response is to strive to increase the “yield” from visitors, rather than to focus on increasing visitor numbers. Such a goal is consistent with existing State and local tourism objectives. Increasing the yield can be achieved by encouraging greater expenditure by visitors while they are on the Island, primarily through the conversion of day trips into overnight or multiple night stays. This approach is also likely to encourage increased repeat visitation outside peak periods.

Instead of trying to fit more visitors on to the Island during those periods of peak demand, it is better to actively develop a strategy that encourages increased visitor numbers at other times and, as a result, increases the sustainability and viability of the local tourism industry and local community services. This could include the further development of specific activities and events that focus on the Island’s competitive advantages.

ACTIONS

- In consultation with key stakeholders, undertake a destination positioning identification process (a forum or workshop involving all interested parties) that considers the unique Island attributes, natural assets, environmental values, cultural and heritage assets, Island produce and Island lifestyle.
- Develop and implement a cooperative marketing strategy (brand and tactical, product, price, promotion and distribution) including identification of target markets (high yielding) matched to Bruny Island’s destination positioning.
- Develop a unique market positioning and brand identity, together with a Bruny Island brand style guide, and encourage all businesses and organisations to use consistently.
- Incorporate the positioning and brand in the DST and Tourism Tasmania marketing strategies and communications.
- Endeavour to integrate or link web sites promoting various aspects of Island life and develop strategies to make better use of social media to promote Bruny.
- Target off-peak activities and promote the year-round attractions in visiting Bruny Island.
- Actively seek out low-cost ways of promoting the Island lifestyle through a visiting journalists program – including opportunities to feature local produce in hospitality offerings and promotion of Island exports.
- Support the ‘Island/sustainability/nature based’ positioning by encouraging the ‘Conscious Travel’ market segment trend to guide destination and experience development and visitor hosting.

6.2 PRODUCT AND BUSINESS DEVELOPMENT

A strong and well regarded tourism industry on Bruny Island is essential. These businesses will promote the Island and provide the enjoyable experiences that back up the promotional claims. Healthy and viable businesses will provide the quality facilities and services that ensure a sustainable future for both themselves and other businesses on the Island.

The following strategies are regarded as important in achieving a sustainable and appropriate tourism industry on Bruny Island:

ensure that tourism activities and new developments are designed to suit the character of Bruny Island;

increase the availability of visitor accommodation on the island, ensuring a range of accommodation types are available;

develop a variety of nature-based, heritage, cultural and food experiences and encourage visitor dispersal around the Island;

increase visitor awareness of the extent of the Island and its attractions and the opportunities to visit outside of peak periods;

develop a marketing strategy with a unique value proposition based on the experiences and the Island lifestyle that is supported by all operators;

encourage a coordinated effort from all tourism operators as they see the benefits of cross referrals and common marketing strategies;

encourage increased investment on the island from the tourism industry as it appreciates the opportunities of a higher yield from visitors;

encourage increased services (shops, community and recreation) that both meet and take advantage of the higher visitor expenditure and demand;

encourage an increased tolerance and acceptance of tourists from the permanent population as visitors stay more within that community;

visitor activity is to be dispersed around the Island so that all operators benefit and reduce the impact on a few "hot spots"; and

facilitate the optimal use of existing infrastructure and target upgrades or improvements to those areas that are under the most pressure.

While there are almost 100 accommodation operators on Bruny Island, the actual capacity of most of these operators is small and largely restricted to self-contained cottages and a few bed-and-breakfasts. A number of these operators are relatively new arrivals to the industry and

have no doubt contributed to the recent increased growth in visitor nights on the Island. However, the majority of the Island's visitors are still day-visitors. If the tourism industry on the Island is to increase the yield obtained from visitors, more accommodation in general is needed.

The 4 to 5 star market is in not well catered for on the Island, yet it is this market and the budget and camping/campervan markets where there is presently the greatest demand. Many travelers are only prepared to accept high quality accommodation standards, however there are relatively few properties on the Island rated at the 4 to 5 star level. This can be contrasted with the rapid growth in this sector in other parts of the State. If yield is to increase, the amount of accommodation at this higher end of the market needs to increase.

There is also a need to provide for the accommodation of larger groups on the Island. This, in itself, will increase the interest from special interest groups in meeting or holidaying on Bruny Island. It will also encourage longer stays and the greater use of bus transport rather than private vehicles and assist in reducing potential ferry congestion. It will also encourage groups of visitors to come to Bruny Island outside of the peak period.

Campervans and motor homes are a popular way of holidaying and visiting Bruny Island. This sector is a significant contributor to local and regional economies. The installation of a wastewater dump site at Alonnah enables these vehicles to stay longer and for more local businesses to benefit from the increased expenditure. An RV strategy for Kingborough has been prepared and the Bruny Island components (RV Friendly destinations in the north and south of the Island) are to be encouraged. This will provide for serviced sites that are suitable for overnight stays and which should not conflict with other existing commercial operations.

The following sections provide a summary on how the visitor may have a variety of experiences and stay longer on the Island enjoying the main attractions.

Nature-based experiences

The natural environment is Bruny Island's greatest asset. There are numerous nature-based experiences available to the traveler that can be accessed at little cost or be included as part of commercial visitor experiences. Bruny is a walker's paradise with many regular routes as well as numerous shorter informal opportunities. Most of these activities are located within the extensive areas of Crown land, National Park or State Forest that exist on Bruny Island.

Wildlife is a feature of the Island where a variety of Tasmania's unique mammals are easily accessible to the traveler and where all 12 endemic species of Tasmanian bird can be seen. The unique marine environment and coastal scenery around the Island is best seen from the commercial cruise operations. Bruny Island has a wide variety of plant life, including many of Tasmania's native orchids and other endemic plants. Several tourism operators provide world-class nature-based experiences, including tours aimed at the internationally popular bird-watching segment.

History and heritage experiences

Bruny Island has a very rich Indigenous and European heritage. There are already some Indigenous heritage programs operating from Murrayfield. These are mainly for the school market but could be developed for the wider tourism market. Bruny Island's Indigenous heritage provides many opportunities for public interpretation and improved understanding. Early explorers such as Tasman, Cook, Bligh, D'Entrecasteaux and Furneaux all visited Bruny Island and many people are interested in this early history.

Such important historical associations as these provide many interesting tourism opportunities. The existing local interpretation at Adventure Bay could be expanded to form an Island-wide heritage trail, including interpretation of early whaling at Bull Bay, the history of the Quarantine Station (incorporating the existing interpretive work done by the Friends of the Bruny Island Quarantine Station and the P&WS) and the proposed Dennes Point heritage walk. Such facilities should prove to be very popular with visitors.

Food and wine experiences

The local Bruny Island producers are gaining widespread recognition for the excellent quality of their products and there is now the opportunity to promote a local food and wine trail, linking the various retail outlets. There is undoubtedly the scope to increase the number of enterprises of this nature on the Island and to develop a local produce brand, as well as to participate and grow as part of a larger regional food and wine destination. The challenge is for all businesses on Bruny Island to support these local producers by using their products wherever possible and to work together in a collaborative manner. This is an important step in being able to nurture and develop the emerging Bruny brand.

Art and craft experiences

More than 60 talented artists and craft persons live and work on Bruny Island and the *Art-at-the-Point* gallery at Dennes Point provides a retail outlet for their work. The establishment of other outlets in south Bruny could expand and further encourage this artistic output. There are a growing number of regular arts-based events on the Island, but other opportunities should be sought to better promote, both the artists' work and the lifestyle that inspires them, to the visitors that come to Bruny Island. The community halls on the Island provide an ideal venue for these events (particularly at Alonnah, Adventure Bay and Dennes Point).

ACTIONS

- Undertake an audit of accommodation, attractions and visitor services to identify gaps and opportunities. Prepare a prospectus of development opportunities and work with DST to advocate and facilitate in collaboration with the State Government.

- Investigate the feasibility of a public/private operated Bruny Island Visitor Centre as an attraction to interpret Island biodiversity, produce, heritage and visitor services, supported with retail and hospitality services.
- Engage with DST and explore opportunities to obtain industry development assistance that meets the unique needs of the Island's tourism operators.
- Develop and implement a visitor service excellence program in order to ensure maximum visitor satisfaction and to then monitor, promote and continuously improve customer service levels. Consider 'Conscious Host' training.
- Consult with local indigenous groups to determine what further opportunities there are to interpret the history of Bruny Island Indigenous people.
- Develop greater industry cohesiveness and cooperation on the Island in order to build synergies and mutual operator support.
- Encourage businesses operating on Bruny Island to achieve relevant environmental and general tourism accreditations.
- Encourage a significant increase in the availability and quality of visitor accommodation on the Island in order to convert more day visitors to overnight stays.
- Continuously develop Bruny Island produce offerings and experiences – such as 'meet the producer' experiences, food trail, special events and off-island promotions.
- Encourage and promote local events that will attract visitors and build on the unique heritage and cultural attractions of Bruny Island.
- Consider the development of a 'Volunteer Visitor' program for conservation projects.
- Implement a recreation vehicle (campervans and motorhomes) strategy that provides and promotes 'RV Friendly' sites in different locations around Bruny Island.

6.3 VISITOR INFORMATION AND MANAGEMENT

The unique features of holidaying on Bruny Island should be communicated in all marketing collateral and channels, including printed material and the web site. This should include the scope and nature of the available visitor experiences; the need to stay overnight to best enjoy the Bruny experience; and some of the challenges that visitors may face when visiting. Visitors should be encouraged to experience the variety that Bruny offers and spread themselves around the Island – rather than focusing on a few of the most popular locales.

In order that expectations are fully met, the particular features of the Island in regard to its physical extent, the nature of the roads, travel times and possible ferry delays, all need to be described. Visitors are then more prepared to take any inconvenience in their stride. Most tourists that go to Bruny Island enjoy the journey across the water and it often constitutes part of the reason why they go in the first place. This journey (and the time it takes), together with

there being so much to see on Bruny, should also serve as an inducement for visitors to stay longer rather than to return the same day.

It is also important that visitors are told of the environmental features and attractions and why they need to be protected. Improved communication with tourists is necessary in order that they can best appreciate Bruny Island's unique natural environment in the most sensitive manner. Such behavior as encouraging visitors to take their rubbish home and to drive carefully to avoid road-kill needs to be well communicated. This should just be a well-accepted and positive part of a visitor's Bruny Island experience.

These types of messages will need to be communicated by a variety of means. Roadside signs are an important component in this regard and the proposals outlined in section 2.5 will need to be implemented. Brochures, websites, apps, social media and the verbal communication from tourist operators are all of course critical in communicating these same messages and in providing the information that visitors are seeking. This is all part of the implementation of a broader visitor information and communication strategy.

ACTIONS

- Research visitor travel movements to determine origin of visitors, sites visited, expenditure, and the location and adequacy of visitor services. Consider opportunities for improvements and value adding to increase length of stay, dispersal, expenditure and satisfaction. This could be informed by undertaking an ongoing survey of visitors and/or use of the SenseT project.
- Review all the suggestions within the Village Well report 'Bruny Island Placemaking and Experience' and identify opportunities to improve visitor engagement and any particular projects that could be implemented either on their own or in conjunction with the Actions identified within this Strategy.
- Review existing visitor information to determine accuracy, consistency, adequacy, distribution gaps, visitor reviews and feedback, and consistency with any refreshed positioning. Consider opportunities for improving the Bruny Island website, printed collateral, on-line tourism review sites, mobile apps and WiFi availability.
- Maintain and upgrade when necessary the existing Bruny Island tourism brochure and website, plus further develop other coordinated communication measures that are best able to provide information to visitors. Ensure potential visitors are aware of the special circumstances relating to Bruny Island within such promotional collateral.
- Review, develop and progressively implement a program of improving all the way-finding services in order to provide information that visitors will need to safely navigate their way around the Island. This could include a distinctive welcome sign statement as

a photo point for visitors and as an opportunity to educate visitors to respect Island community values.

- Develop and implement a coordinated tourism signage strategy that considers interpretation/information and directional signs – including advertising signs, tourism businesses, photo opportunities (pull-over bays), distances and times to the main destinations, road conditions, local attractions and other complementary means of communication. Remove all unauthorized roadside signs and refresh and upgrade all Island signs and interpretation accordingly.
- Investigate the feasibility of a tourism information pull-over bay on Bruny Main Road, just south of the Adventure Bay Road intersection.

6.4 VISITOR ACCESS AND TRANSPORT

The provision of better road and ferry infrastructure on Bruny Island has always attracted a great deal of attention. An extensive description of the relevant issues in this regard is provided in section 2.

There is an opportunity to address road infrastructure issues in a coordinated manner that considers a combined approach to how the Main Road (Dept of State Growth), Council roads and other public roads (within National Parks and State Forests) are best managed and maintained. The most critical areas in regard to the main road are at the Neck, the Lighthouse Road, between Alonnah and Lunawanna, and in the Bull Bay area.

In recent years, there have been many suggestions made as to what infrastructure improvements need to occur. Many of these suggestions have been followed through but it is clear that there is still a reasonably extensive list of works that are still needed – and most of these are included within the recommended Actions. Future priorities will tend to focus on those areas where there is the greatest demand and tourism congestion is the greatest.

The ferry arrangements and the related infrastructure issues are particularly critical and the facilities at Roberts Point and Kettering should be comfortable and convenient in order to meet the needs of users. Alternative access opportunities should be explored, including ferries to Dennes Point, increased air travel and cruise visits to Adventure Bay. These opportunities could be aligned with complementary activities and businesses at particular locations (such as at Dennes Point).

The community surveys that have been conducted have always identified that an improvement to road condition and public safety are amongst the most important issues to be addressed on Bruny Island. There needs to be a strong focus on this within any strategy that aims to meet future visitor and resident needs. Road improvements do need to be made and a review of speed limits conducted. Slower speeds also complement the slower pace of life that many seek

on Bruny. Bicycle touring is a relatively unexplored opportunity and could be promoted as a better way of seeing the Island's attractions.

The ferry related issues are linked to the road issues due to both having the same important access and transport functions. They need to be considered together and within the current review of the existing ferry contract. The ferry journey is an integral part of the Bruny tourism experience and should be seen as an opportunity to welcome and thank visitors for coming to Bruny Island

ACTIONS

- Develop an integrated road asset upgrade and maintenance plan that encompasses all public roads on Bruny Island (and which includes a review of speed limits and signage to protect native wildlife). Ensure ex-Forestry Roads are maintained to a suitable standard that can cater for both visitor and emergency access.
- Implement the proposed upgrade of the lookout, boardwalks, interpretation and parking area at the Neck, together with an upgrade of the road.
- Upgrade gravel roads that are in a relatively poor condition (eg Lighthouse Road, Coolangatta Road, Cloudy Bay, Main Road on North Bruny).
- Program the sealing of roads in or adjacent to built-up areas (eg Main Road at Lunawanna and Dennes Point, Cemetery Rd, Harvey Road).
- Develop or formalise roadside parking along Adventure Bay Road, particularly near the shop.
- Promote cycling opportunities on the Island and investigate related infrastructure improvements that may improve safety and amenity for cyclists.
- Identify a local quarry (or obtain development approval for a future quarry) that can provide a more accessible source of gravel to ensure local roads are able to be more efficiently maintained.
- Consider opportunities to diversify visitor access – such as access development needs and opportunities in regard to airstrip upgrade, water taxis, additional ferry services (eg Dennes Point) and alternative internal transport options (such as a bus service).
- Determine what changes may be possible to the next ferry contract that would enhance visitor amenity and convenience.
- Improve the ferry terminal experience as the major visitor arrival, gateway and departure experience. Improve parking, queuing, accessibility and other public facilities at the Roberts Point marshalling area and review opportunities for road widening to expand area. Improve condition of kiosk and toilets at Roberts Point (including the need for disabled persons' toilet).

6.5 INFRASTRUCTURE DEVELOPMENT

Both visitors and residents utilise and appreciate the public recreational infrastructure and facilities provided on Bruny Island – whether they be located on roadsides, coastal foreshores, national parks or other public land.

How sufficient and good quality infrastructure is able to be provided to support both visitors and residents in small isolated communities like Bruny Island is always a vexed issue. There are different views on what public infrastructure is most needed (including their relative priorities) and there are different views on whether the infrastructure should be primarily for residents or for visitors – ideally it should cater for the needs of both. There is usually never enough funds available to meet the expressed demands.

The significant increase in visitor numbers has placed a great deal of pressure on many of these facilities and it is now apparent that many upgrades and improvements are necessary. Most visitors come to Bruny Island to enjoy the outdoor experiences that the Island offers and so it is essential that the individual venues meet (or exceed) their expectations. This is most important at the most popular locations and where degradation (due to over-use) is most likely to occur. Essential amenities (eg public toilets) need to be provided.

Protecting the quality of the natural environment is an important tourism consideration. A critical aspect of this is the need to ensure that visitor infrastructure can meet demand and local areas are not being spoilt or damaged because of inadequate infrastructure. This particularly relates to public land – such as beaches, forest walks and national parks. One particular site that warrants special attention is the Neck where it is proposed to improve the viewing facilities and public amenities.

Walking trails on the Island need to be adequately maintained and well signposted. These trails are very popular and their ongoing promotion will assist in getting visitors to stay longer on the Island. The P&WS in particular need to be sufficiently resourced for this to occur. There is an opportunity to promote a series of short walks that visitors could do in an hour or two while in the local area. In some cases, new short walks could be created at minimum expense.

In recent years, there have been many suggestions made as to what reserve infrastructure improvements need to occur. Many of these suggestions have been followed through but it is clear that there is a reasonably extensive list of works that are still needed. Priorities will tend to focus on those areas where the visitor demand is the greatest. The Island's infrastructure is put under strain at peak times, threatening the quality of the visitor experience.

Kingborough Council, together with a number of local community groups, has endorsed the suggestion that a 'landing fee' be investigated in order to provide an additional source of revenue to fund public infrastructure that is specifically needed to meet the needs of increased visitors (see section 7).

ACTIONS

- Undertake an audit of visitor infrastructure to identify maintenance, renewal and development needs – including ambulance, footpaths, roads, National park visitor services, walking tracks and trails, telecommunications, access to key sites, information services, water, electricity, parking, wayside stops, viewing platforms and interpretation; toilets, rubbish management, jetties and boat ramps. Determine priorities and seek to secure resources and commitments from Council and State government agencies.
- Provide additional public toilet facilities or upgrade existing facilities at Alonnah, Lunawanna, Adventure Bay, Roberts Point and possibly Barnes Bay.
- Review the waste disposal arrangements on public reserves and whether expanded collection services will effectively address illegal rubbish dumping problems.
- Implement the plans to improve day visitation, car parking and toilet facilities at the South Bruny Lighthouse and Cloudy Bay.
- Improve day visitation facilities and public car parking at Dennes Point and upgrade the access in to Kellaway Park to facilitate future improvements and increased use.
- Construct a pathway within the beach foreshore area from shop north to Quiet Corner at Adventure Bay.
- Develop a pedestrian walkway along Adventure Bay Road from Bligh Creek to East Cove.
- Construct heritage trail at Dennes Point, upgrade the Cape Queen Elizabeth Track, provide improved signage at the Mavista Walk and review opportunities for promoting a package of short walks scattered across the Island.
- Review operational and maintenance requirements for the pontoon marina at Alonnah and, at Dennes Point, improve boat launching facility and improve jetty to cater for wider range of ferries.
- Upgrade community halls to facilitate increased community use and so that they may be better used for cultural events of interest to visitors.
- Identify and seek external grant or other funding opportunities in order to facilitate the desired improvements listed above.

6.6 COMMUNITY AND INDUSTRY COLLABORATION

An effective tourism strategy will rely on close collaboration between the local resident population and the industry operators. In many cases, they are one and the same, but there often are situations where the capacity and patience of the resident population is stretched by

the demands placed on it by the relatively large number of visitors that come to Bruny Island. This has been expanded upon earlier in section 2.3.

The resident population is relatively small and its resilience could be threatened during emergency situations, particularly when there are many tourists present. It is important that mechanisms are in place to encourage good cooperation and communication between the Bruny Island community and tourism industry. Both are reliant on the other in regard to so many aspects and good relationships are essential.

In fact the resident community can play an important role in enhancing the visitor experience. Bruny Island has many interesting facets that can be better explained to the visitor. The many stories that can be told provide a greater understanding and depth that will create more enjoyable visits, encourage longer stays and promote return visits. There are many opportunities to improve the manner in which this information is made available and interpreted through conversations, brochures, booklets, signs, tours, walks or experiences.

Another important aspect that will connect community and industry will be in regard to how future development proposals will be considered. A sustainable tourism industry will be one that suits the special character and natural features of Bruny Island. All future tourism development proposals are assessed against the development standards within the current planning scheme. The planning scheme itself constitutes the main regulatory instrument that will constrain what is regarded as inappropriate tourism development and to protect the existing community and environmental values.

As well as there being regulatory instruments to control or encourage suitable development, some degree of influence is also exerted by various informal policies and strategies. These are usually developed by State government agencies or by Kingborough Council, but may also be developed by non-government organisations or community groups. An example of the latter is that the Bruny Island Environment Network (BIEN) has produced a policy for eco and nature-based tourism activities on Bruny Island. This policy sets out the position adopted by this local community group and it is intended to form a basis on which that group can then work cooperatively with other stakeholders on tourism-related development issues (BIEN 2010).

BIEN has also recently proposed that Bruny Island and the surrounding waters be included within a Biosphere Reserve. This would provide the necessary principles and directions to facilitate innovative approaches to conservation and sustainable development. There are also other widely adopted principles for sustainable tourism development that could be adopted by tourism operators, such as those adopted by Ecotourism Australia and promoted through their ECO Certification Program or the Green Globe program.

The ultimate aim of these various policies, guidelines or regulatory instruments is for future development and associated tourism activities to be complementary to the environmental and social values that make Bruny Island such a special place. No-one wants to ruin what is most

special about Bruny Island. Tourism cannot be treated in isolation and it is extremely important that it occurs in a sustainably balanced manner – providing a range of benefits without overly impacting on the natural values and infrastructure limitations.

This balanced relationship cannot be easily defined and there must be ongoing dialogue between industry and community and further investigations conducted to explore optimum solutions. This Tourism Strategy does not purport to provide a final solution but does aim to assist in achieving an appropriate balance.

Over time there will be a need to resolve conflicts and mediate development-related disputes. There will be a range of views as to whether various proposals or activities will suit what is regarded as being consistent with the “character” of Bruny Island (see Appendix). Kingborough Council may have a role in facilitating dispute resolution procedures in future or this may fall to other organisations that are more appropriate under the circumstances. Opportunities need to be taken to identify common ground and pursue “win-win” scenarios.

If visitors are staying longer on the Island there is a much greater chance of them being accepted by the Bruny community, plus the visitors themselves will enjoy their holiday experience as they genuinely experience and participate in the Island lifestyle. A good way to ensure that visitors engage more with the Bruny Island community is to involve them in the local community activities and to learn more about the interesting attractions on the Island. Providing suitable venues for this to happen will be important. In this regard there are a number of opportunities to upgrade the existing community halls (eg Alonnah, Adventure Bay and Dennes Point) that facilitate their increased use for cultural events and performances.

ACTIONS

- Establish an annual industry and community forum to consider the status of the visitor economy (information sharing), celebrate industry and community leadership contributions, review the progress of tourism strategy implementation, and consider collaborative projects (such as conservation projects, interpretation and information provision, community engagement, community and visitor services, heritage and culture stories and special events).
- Consider outcomes of the state-wide visitor engagement project and identify opportunities for Bruny Island tourism and community partnerships to increase visitor experience and community benefit.
- Upgrade the existing community halls so that they are more suitable for both residents and visitors to enjoy cultural events and performances.
- Prepare an emergency management plan for Bruny Island that includes the need to effectively communicate and alert visitors to Bruny Island.

- Facilitate local community information forums with prospective developers and assist in the mediation of development conflicts prior to formal planning approval processes.
- Review planning scheme controls to ensure that new development proposals are low-key and consistent with the Bruny Island character and positioning.
- Enforce planning controls to ensure permit conditions are met, commercial accommodation providers have approvals in place and illegal or unsightly tourism signage is removed.
- Encourage tourism businesses to seek environmental accreditation and pursue the suggested UNESCO Biosphere application to further protect the important Bruny Island natural values.

7. RESOURCING STRATEGY IMPLEMENTATION

The implementation of this Strategy will go hand in hand with the proposed implementation of the Bruny Island Destination Action Plan. The latter will involve the establishment of a Leadership Group and this core group of people will oversee the implementation of many of the Actions included within this Strategy. The other Actions will be mainly followed up by Council.

The main constraint in all cases will however be the availability of funds. Resources will always be limited and many Actions may need to be deferred until it is possible for them to be adequately resourced. This will be an ongoing challenge and it is to be expected that frustrations will mount over time.

BIAC has for a number of years been investigating other potential revenue sources that could support the provision of improved tourism infrastructure on Bruny Island. In 2010, Kingborough Council and Tourism Tasmania commissioned a report canvassing potential funding options. The report focused on the three “hot spots” – being Roberts Point, The Neck and Adventure Bay. These are areas of particular congestion, where the existing public infrastructure is inadequate. A financial assessment was conducted of potential funding mechanisms for each of these areas. Visitor charges were felt to be appropriate for Roberts Point and East Cove and grant funding could be applied to improvements required at East Cove and The Neck.

The consultant’s report identified seven different potential sources of revenue for funding tourism infrastructure needs. These were:

general rates and taxes – as already used by Council to fund infrastructure works throughout the municipality (this funding source is subject to competing priorities and this often limits expenditure on Bruny Island);

differential rates – in that Council could rate different categories of land use (such as increased rate levels for commercial uses), though on Bruny this would not be so suitable due to the relatively small number of businesses or different types of land uses;

special rates and separate charges – in that Council could impose a specific charge on the ratepayers to fund a particular project or projects, though on Bruny there is quite a limited rate base and there would be constraints on the total revenue that could be obtained;

development charges – in that Council would require that public infrastructure be provided in association with proposed private development – however this would only be possible when it can be justified because of the particular public impacts generated by the particular development ;

visitor charges – such that the ‘user pays’ in the form of a levy on top of other charges imposed by a third party (eg a ferry tourism levy) and this revenue may then be used in a generic sense (to fund a broad range of pre-determined improvements) or for specific larger infrastructure projects;

asset sales – in that existing public assets (eg land) may be sold in order to generate revenue needed for particular projects, though it is anticipated that there would be very limited opportunities for this on Bruny Island; and

grants, donations and sponsorships – these are normally applied to fund specific infrastructure projects and not applicable to generic or ongoing funding requirements, though nevertheless are often effective in addressing some critical or urgent needs (SGS Economics and Planning 2010).

The general conclusions from this report were that:

visitor charges can be an effective means of funding infrastructure provided the infrastructure can be pre-funded to ensure timely delivery and that there is a clear nexus between who pays and who benefits;

as an example of how this nexus might be established, costs were apportioned for Roberts Point (40% residents, 9% shack owners, 43% visitors, 9% commercial operators), East Cove (20% residents, 11% shack owners, 43% cruise visitors, 19% other visitors, 7% small marine operators) and The Neck (29% residents, 11% shack owners, 60% visitors) – these could form the basis for determining revenue sources if levies are applied;

visitor charges could be abolished once the infrastructure has been delivered or reduced to a level to meet recurrent maintenance costs – though any application to fund generic infrastructure needs is expected to be opposed by the tourism industry;

grant funding may be a feasible mechanism for particular projects but will not cover recurrent maintenance costs; and

general rates and differential rates could be feasible funding mechanisms in regard to funding generic or ongoing tourism infrastructure needs.

Commercial operators should be responsible for funding the necessary additional infrastructure that is required to enable them to minimize external impacts and to operate sustainably. There also appears to be a sound argument to obtaining increased financial contributions from visitors that reflect the additional pressures placed on public infrastructure.

One way of doing this is by way of a ferry "landing fee". This would generate additional revenue from visitors to the Island for the specific purpose of improving the infrastructure (ferry terminals, picnic areas, walking trails, roadside pull-over bays, public toilets etc) that these visitors require and would be similar to other levies that exist for travelers to islands elsewhere in Australia. This additional ferry charge could be justified on the basis of the level of tourism impact and the difficulties faced by the Bruny Island community in being able to respond to this impact.

At the very least, the charge could be collected to directly fund the on-land ferry related infrastructure – particularly at Roberts Point, where it could be used to upgrade the public toilets and the kiosk; construct the larger marshalling area; improve the road coming down the hill (enabling cars to be parked alongside it); build a covered waiting area for pedestrian passengers; lighting; and an improved information pullover area for visitors. That is, the fees paid to travel on the ferry also cover the upgrade and maintenance of the ferry related on-land infrastructure. The users of the ferry are then contributing to the appropriate upkeep of the ferry and terminal assets. This could be the initial stage of works prior to the use of the collected funds to address other visitor infrastructure shortcomings on the Island.

Additional funding is more likely to come from the additional resources allocated by government to the upgrade and provision of public infrastructure on the Island – such as the current proposals to upgrade a number of facilities within the national park and at such locations as the Neck and the Department of State Growth's proposals for road improvements and increasing the resources for the annual maintenance of the Main Road. Kingborough Council is also proposing a number of significant road improvements and public amenities. The other opportunity relates to external grants and future election commitments.

Regardless of the source of the funds, additional external revenue is necessary in order that critical public infrastructure is provided in the foreseeable future. All stakeholders have a role in identifying new funding sources and grant opportunities that can improve the visitor services on the Island. Without these additional funds, new facilities and major upgrades will not be possible.

ACTIONS

- Determine the feasibility of a “landing fee” that generates funds for improved land-based ferry and tourism infrastructure and incorporate this suggestion within the development of the new ferry contract terms and conditions.
- Prepare a ‘Priority Projects Action Plan’ supported by appropriate business costing and business plans. The plan is to include infrastructure maintenance, renewal and development details. Identify potential government grant programs, prepare applications and implement a coordinated advocacy program.
- Prepare an ‘Investment Prospectus’ of product development opportunities for attraction of public and private investment for renewal and development of accommodation, attractions and services consistent with the Bruny Island positioning and to fit well researched demand gaps.
- Undertake an independent economic analysis of the Bruny Island visitor economy to support attraction of public and private investment.
- Undertake research of ‘user pays’ models and opportunities. Investigate a Bruny Island Pass (packaging of Island experiences and services); public land/access fees; visitor volunteers for conservation projects; value added ‘exclusive’ experiences; crowd funding for conservation or product development projects; and support and encourage small group tours to limit visitor vehicle traffic and to enable support of local providers and facilities.
- Consider the development, sale and distribution of unique Bruny Island merchandise.
- Investigate opportunities to engage tertiary students in research, visitor servicing, IT and interpretation design projects.
- Investigate establishing a Community Bank and the opportunity to support local projects.



8. SUMMARY OF PRIORITY ACTIONS

The following Table provides a summary of the priority actions that have been included in this Tourism Strategy for Bruny Island. The actions are listed as ongoing; short – medium term (in the next 5 years) or medium term (5 – 10 years).

Each of the actions has been allocated a responsibility and the respective organisations need to be sufficiently committed to the strategy’s implementation. Kingborough Council will be endeavouring to facilitate this into the future. The Actions themselves will be reviewed as part of the regular review of this Strategy.

The abbreviations for the various organizations in the “responsibility” column are as follows:

Council – Kingborough Council (including BIAC)
PWS – Parks and Wildlife Service (and Crown Lands)
DSG – Department of State Growth
MAST – Marine and Safety Tasmania
DST – Destination Southern Tasmania
BICA – Bruny Island Community Association
BITA – Bruny Island Tourism Association
FNB – Friends of North Bruny

ISSUE	PRIORITY ACTION	TIMING	RESPONSIBILITY
Marketing the Bruny Island Experience	<ul style="list-style-type: none"> In consultation with key stakeholders, undertake a destination positioning identification process (a forum or workshop involving all interested parties) that considers the unique Island attributes, natural assets, environmental values, cultural and heritage assets, Island produce and Island lifestyle. 	Short term	DST/BITA/Council
	<ul style="list-style-type: none"> Develop and implement a cooperative marketing strategy (brand and tactical, product, price, promotion and distribution) including identification of target markets (high yielding) matched to Bruny Island's destination positioning. 	Short term	DST/BITA/Council
	<ul style="list-style-type: none"> Develop a unique market positioning and brand identity, together with a Bruny Island brand style guide, and encourage all businesses and organisations to use consistently. 	Medium term	BITA/DST
	<ul style="list-style-type: none"> Incorporate the positioning and brand in the DST and Tourism Tasmania marketing strategies and communications. 	Medium term	DST
	<ul style="list-style-type: none"> Endeavour to integrate or link web sites promoting various aspects of Island life and develop strategies to make better use of social media to promote Bruny. 	Medium term	BITA/DST
	<ul style="list-style-type: none"> Target off-peak activities and promote the year-round attractions in visiting Bruny Island. 	Ongoing	BITA/DST
	<ul style="list-style-type: none"> Actively seek out low-cost ways of promoting the Island lifestyle through a visiting journalists program – including opportunities to feature local produce in hospitality offerings and promotion of Island exports. 	Ongoing	BITA/DST
	<ul style="list-style-type: none"> Support the 'Island/sustainability/nature based' positioning by encouraging the 'Conscious Travel' market segment in destination and experience development and visitor hosting. 	Ongoing	BITA/DST

Product and Business Development	<ul style="list-style-type: none"> Undertake an audit of accommodation, attractions and visitor services to identify gaps and opportunities. Prepare a prospectus of development opportunities and work with DST to advocate and facilitate in collaboration with the State Government. 	Short term	Council/DST
	<ul style="list-style-type: none"> Investigate the feasibility of a public/private operated Bruny Island Visitor Centre as an attraction to interpret Island biodiversity, produce, heritage and visitor services, supported with retail and hospitality services. 	Medium term	BITA/DST
	<ul style="list-style-type: none"> Engage with DST and explore opportunities to obtain industry development assistance that meets the unique needs of the Island's tourism operators. 	Ongoing	BITA/Council/DST
	<ul style="list-style-type: none"> Develop and implement a visitor service excellence program in order to ensure maximum visitor satisfaction and to then monitor, promote and continuously improve customer service levels. Consider 'Conscious Host' training. 	Ongoing	BITA/DST
	<ul style="list-style-type: none"> Consult with local indigenous groups to determine what further opportunities there are to interpret the history of Bruny Island Indigenous people. 	Ongoing	DST/Council
	<ul style="list-style-type: none"> Develop greater industry cohesiveness and cooperation on the Island in order to build synergies and mutual operator support. 	Ongoing	BITA/DST
	<ul style="list-style-type: none"> Encourage businesses operating on Bruny Island to achieve relevant environmental and general tourism accreditations. 	Ongoing	BITA/DST
	<ul style="list-style-type: none"> Encourage a significant increase in the availability and quality of visitor accommodation on the Island in order to convert more day visitors to overnight stays. 	Ongoing	BITA/Council/DST
	<ul style="list-style-type: none"> Continuously develop Bruny Island produce offerings and experiences – such as 'meet the producer' experiences, food trail, special events and off-island promotions. 	Ongoing	BITA/DST/Council

	<ul style="list-style-type: none"> • Encourage and promote local events that will attract visitors and build on the unique heritage and cultural attractions of Bruny Island. • Consider the development of a 'Volunteer Visitor' program for conservation projects. • Implement a recreation vehicle (campervans and motorhomes) strategy that provides and promotes 'RV Friendly' sites in different locations around Bruny Island. 	<p>Ongoing</p> <p>Medium term</p> <p>Short term</p>	<p>BICA/BITA</p> <p>BICA</p> <p>Council</p>
<p>Visitor Information and Management</p>	<ul style="list-style-type: none"> • Research visitor travel movements to determine origin of visitors, sites visited, expenditure, and the location and adequacy of visitor services. Consider opportunities for improvements and value adding to increase length of stay, dispersal, expenditure and satisfaction. This could be informed by an ongoing survey of visitors and/or use of the SenseT project. • Review all the suggestions within the Village Well report 'Bruny Island Placemaking and Experience' and identify opportunities to improve visitor engagement and any particular projects that could be implemented either on their own or in conjunction with their Actions identified within this Strategy. • Review existing visitor information to determine accuracy, consistency, adequacy, distribution gaps, visitor reviews and feedback, and consistency with any refreshed positioning. Consider opportunities for improving the Bruny Island website, printed collateral, on-line tourism review sites, mobile apps and WiFi availability. • Maintain and upgrade when necessary the existing Bruny Island tourism brochure and website, plus further develop other coordinated communication measures that are best able to provide information to visitors. Ensure potential visitors are aware of the special circumstances relating to Bruny Island within such promotional collateral. 	<p>Short term</p> <p>Short term</p> <p>Short term</p> <p>Short term</p>	<p>DST/Council/DSG</p> <p>DST/Council/BICA</p> <p>DST/Council/BITA</p> <p>BITA/DST</p>

	<ul style="list-style-type: none"> • Review, develop and progressively implement a program of improving all the way-finding services in order to provide information that visitors will need to safely navigate their way around the Island. This could include a distinctive welcome sign statement as a photo point for visitors and as an opportunity to educate visitors to respect Island community values. • Develop and implement a coordinated tourism signage strategy that considers interpretation/information and directional signs – including advertising signs, tourism businesses, photo opportunities (pull-over bays), distances and times to the main destinations, road conditions, local attractions and other complementary means of communication. Remove all unauthorized roadside signs and refresh and upgrade all Island signs and interpretation accordingly. • Investigate the feasibility of a tourism information pull-over bay on Bruny Main Road, just south of the Adventure Bay Road intersection. 	Medium term	Council/DSG/DST
		Medium term	DSG/Council/PWS
		Medium term	DSG/Council/BITA
Visitor Access and Transport	<ul style="list-style-type: none"> • Develop an integrated road asset upgrade and maintenance plan that encompasses all public roads on Bruny Island (and which includes a review of speed limits and signage to protect native wildlife). Ensure ex-Forestry Roads are maintained to a suitable standard that can cater for both visitor and emergency access. • Implement the proposed upgrade of the lookout, boardwalks, interpretation and parking area at the Neck, together with an upgrade of the road. • Upgrade gravel roads that are in a relatively poor condition (eg Lighthouse Road, Coolangatta Road, Cloudy Bay, Main Road on North Bruny). • Program the sealing of roads in or adjacent to built-up areas (eg Main Road at Lunawanna 	Medium term	DSG/Council
		Short term	PWS/DSG
		Medium term	Council/DSG/PWS
		Medium term	Council/DSG

	<p>and Dennes Point, Cemetery Rd, Harvey Road).</p> <ul style="list-style-type: none"> • Develop or formalise roadside parking along Adventure Bay Road, particularly at the shop. • Promote cycling opportunities on the Island and investigate related infrastructure improvements that may improve safety and amenity for cyclists. • Identify a local quarry (or obtain development approval for a future quarry) that can provide a more accessible source of gravel to ensure local roads are able to be more efficiently maintained. • Consider opportunities to diversify visitor access – such as access development needs and opportunities in regard to airstrip upgrade, water taxis, additional ferry services (eg Dennes Point) and alternative internal transport options (such as a bus service). • Determine what changes may be possible to the next ferry contract that would enhance visitor amenity and convenience. • Improve the ferry terminal experience as the major visitor arrival, gateway and departure experience. Improve parking, queuing, accessibility and other public facilities at the Roberts Point marshalling area and review opportunities for road widening to expand area. Improve condition of kiosk and toilets at Roberts Point (including the need for disabled persons' toilet). 		
Medium term		Council	
Medium term		Council/DSG/DST	
Medium term		Council	
Ongoing		BICA/BITA/Council	
Short term		DSG/BICA/Council	
Medium term		DSG	
Infrastructure Development	<ul style="list-style-type: none"> • Undertake an audit of visitor infrastructure to identify maintenance, renewal and development needs – including ambulance, footpaths, roads, National park visitor services, walking tracks and trails, telecommunications, access to key sites, information services, water, electricity, parking, wayside stops, viewing platforms and interpretation; toilets, 	Short term	Council/DSG/PWS

	<p>rubbish management, jetties and boat ramps. Determine priorities and seek to secure resources and commitments from Council and State government agencies.</p>		
	<ul style="list-style-type: none"> • Provide additional public toilet facilities or upgrade existing facilities at Alonnah, Lunawanna, Adventure Bay, Roberts Point and possibly Barnes Bay. 	Short term	Council/DSG
	<ul style="list-style-type: none"> • Review the waste disposal arrangements on public reserves and whether expanded collection services will effectively address illegal rubbish dumping problems. 	Short term	Council
	<ul style="list-style-type: none"> • Implement the plans to improve day visitation, car parking and toilet facilities at the South Bruny Lighthouse and Cloudy Bay. 	Short term	PWS
	<ul style="list-style-type: none"> • Improve day visitation facilities and public car parking at Dennes Point and upgrade the access in to Kellaway Park to facilitate future improvements and increased use. 	Medium term	Council
	<ul style="list-style-type: none"> • Construct a pathway within the beach foreshore area from shop north to Quiet Corner at Adventure Bay. 	Short term	Council
	<ul style="list-style-type: none"> • Develop a pedestrian walkway along Adventure Bay Road from Bligh Creek to East Cove. 	Medium term	Council
	<ul style="list-style-type: none"> • Construct heritage trail at Dennes Point, upgrade the Cape Queen Elizabeth Track, provide improved signage at the Mavista Walk and review opportunities for promoting a package of short walks scattered across the Island. 	Medium term	FONB/PWS
	<ul style="list-style-type: none"> • Review operational and maintenance requirements for the pontoon marina at Alonnah and, at Dennes Point, improve boat launching facility and improve jetty to cater for wider range of ferries. 	Medium term	Council/MAST
	<ul style="list-style-type: none"> • Upgrade community halls to facilitate increased community use and so that they may be better used for cultural events of interest to visitors. 	Ongoing	Council

	<ul style="list-style-type: none"> Identify and seek external grant or other funding opportunities in order to facilitate the desired improvements listed above. 	Ongoing	Council/PWS/BICA
Community and Industry Collaboration	<ul style="list-style-type: none"> Establish an annual industry and community forum to consider the status of the visitor economy (information sharing), celebrate industry and community leadership contributions, review the progress of tourism strategy implementation, and consider collaborative projects (such as conservation projects, interpretation and information provision, community engagement, community and visitor services, heritage and culture stories and special events). 	Short term	BITA/BICA
	<ul style="list-style-type: none"> Consider outcomes of the state-wide visitor engagement project and identify opportunities for Bruny Island tourism and community partnerships to increase visitor experience and community benefit. 	Medium term	DST/BITA/BICA
	<ul style="list-style-type: none"> Upgrade the existing community halls so that they are more suitable for both residents and visitors to enjoy cultural events and performances. 	Ongoing	Council
	<ul style="list-style-type: none"> Prepare an emergency management plan for Bruny Island that includes the need to effectively communicate and alert visitors to Bruny Island. 	Short term	Council/BICA
	<ul style="list-style-type: none"> Facilitate local community information forums with prospective developers and assist in the mediation of development conflicts prior to formal planning approval processes. 	Medium term	Council
	<ul style="list-style-type: none"> Review planning scheme controls to ensure that new development proposals are low-key and consistent with the Bruny Island character and positioning. 	Medium term	Council
	<ul style="list-style-type: none"> Enforce planning controls to ensure permit conditions are met, commercial accommodation providers have approvals in place and illegal or unsightly tourism signage is removed. 	Short term	Council

	<ul style="list-style-type: none"> Encourage tourism businesses to seek environmental accreditation and pursue the suggested UNESCO Biosphere application to further protect the important Bruny Island natural values. 	Short term	BITA/BICA/BIEN
Resourcing Strategy Implementation	<ul style="list-style-type: none"> Determine the feasibility of a “landing fee” that generates funds for improved land-based ferry and tourism infrastructure and incorporate this suggestion within the development of the new ferry contract terms and conditions. 	Short term	Council/DSG/BICA
	<ul style="list-style-type: none"> Prepare a ‘Priority Projects Action Plan’ supported by appropriate business costing and business plans. The plan is to include infrastructure maintenance, renewal and development details. Identify potential government grant programs, prepare applications and implement a coordinated advocacy program. 	Medium term	Council/BITA/DST
	<ul style="list-style-type: none"> Prepare an ‘Investment Prospectus’ of product development opportunities for attraction of public and private investment, renewal and development of accommodation, attractions and services consistent with the Bruny Island positioning and to fit well researched demand gaps. 	Medium term	Council/DST
	<ul style="list-style-type: none"> Undertake an independent economic analysis of the Bruny Island visitor economy to support attraction of public and private investment. 	Medium term	Council/DST
	<ul style="list-style-type: none"> Undertake research of ‘user pays’ models and opportunities. Investigate a Bruny Island Pass (packaging of Island experiences and services); public land/access fees; visitor volunteers for conservation projects; value added ‘exclusive’ experiences; crowd funding for conservation or product development projects; and support and encourage small group tours to limit visitor vehicle traffic and to enable support of local providers and facilities. 	Medium term	DST/Council

	<ul style="list-style-type: none">• Consider the development, sale and distribution of unique Bruny Island merchandise.• Investigate opportunities to engage tertiary students in research, visitor servicing, IT and interpretation design projects.• Investigate establishing a Community Bank and the opportunity to support local projects.	Ongoing Ongoing Medium term	BITA DST/Council BICA
--	---	-----------------------------------	-----------------------------

9. REFERENCES

- BIEN (2010), *Policy for Eco and Nature-based Tourism Activities on Bruny Island*
- Burton, D and Portanger C (2016), *Bruny Island Hazard Communication and Risk Study, a Climate Planning Report.*
- Cochran T and Threatened Species Unit (DPIWE) (2003), *Threatened Species, Bruny Island and You – Managing Threatened Species and Communities on Bruny Island,*
- Department Infrastructure Energy & Resources (2005), *Socio-economic Study of Bruny Island,* 2005
- Destination Southern Tasmania (August 2016), *Bruny Island Destination Action Plan 2016-2018*
- Housego A (2008), *Bruny Island Interpretation Strategy*
- Huon Valley Kingborough Tourism Steering Committee (2015), *Huon Trail Marketing Plan 2015-2016*
- Inspiring Place (November 2007), *Adventure Bay Foreshore Management Plan*
- Kingborough Council, *Community Survey – A Future Vision Plan for Bruny Island, 2007 and 2013*
- Kingborough Council (2008). *Review of the Kingborough Planning Scheme 2000 - Bruny Island*
- REMPPLAN (June 2013), *Economic Impact Analysis: Tourism in Tasmania's South – a report prepared for Tourism Tasmania and Destination Southern Tasmania*

Sarah Lebski and Associates (February 2009), ***The 'Bigger Picture' - Some key tourism issues and strategies for the 'south of Hobart' region***

Sarah Lebski and Associates (2009), ***The Channel Regional Tourism Strategy***

Sarah Lebski and Associates (January 2014), ***Destination Management Plan Southern Tasmania***

SGS Economics and Planning (2010), ***Bruny Island Visitor Infrastructure-Funding Mechanisms***

Tourism Research Australia (2015), ***State of the Tourism Industry 2015***

Tourism Research Australia (August 2009), ***Community perceptions on the impacts of tourism on Tasmanian communities – Stage 1: Summary of results***

Tourism Tasmania (2012), ***Strategic Scan 2012***

Tourism Tasmania (February 2014), ***Tasmanian Visitor Survey***,

Village Well (August 2016), ***Bruny Island Placemaking & Experience: Key Findings Report and Strategy***

APPENDIX 1

DESIRED FUTURE CHARACTER STATEMENTS FOR BRUNY ISLAND

These character statements were included within the former Kingborough Planning Scheme 2000 but were not able to be included in subsequent planning schemes due to format changes.

1. The unique natural environment is Bruny Island's most important attribute and must be protected from inappropriate land use and development.
2. Low-key sensitive development is appropriate within existing developed areas and should essentially be limited to the in-fill development of vacant lots. The existing natural character of rural areas should be protected from rural residential type subdivision that is not sympathetic to the surrounding landscape.
3. The relative isolation of island life is an attraction in itself and brings with it a more relaxed and quieter lifestyle, and a more self-sufficient and supportive community. Development should be designed to discretely support this Bruny Island lifestyle.
4. Use or development that improves service delivery, especially health, transport, retail/restaurant and emergency services, is to be encouraged, particularly within or adjacent to existing developed areas.
5. Large scale developments that do not reflect the existing lifestyle and built characteristics of the Island are generally regarded as being out of character.
6. Tourism provides opportunities for investment and employment and the marketing of Bruny Island. Relatively low-key tourism development is appropriate where it balances the needs of residents and visitors and enhances the Bruny experience.
7. Opportunities for small businesses, agricultural enterprises and 'cottage industries' are to be encouraged where they support and enhance the lifestyles of local residents and the visitor experience.
8. The Aboriginal, cultural and historic heritage of Bruny Island is unique. These values should be recognised and built upon with respect. Such heritage is to be protected and its historical associations should be presented in ways that enhance experiences for visitors and residents.
9. Road infrastructure, recreational facilities and other public services need to be provided and maintained to a higher standard in order to improve local amenity and enjoyment. Use or development should only occur where it will not compromise the standard of such public infrastructure assets.

APPENDIX 2

TOURISM BUSINESSES OPERATING ON BRUNY ISLAND

This has been compiled from a list of registered businesses held by DST and the accommodation permits that have been issued by Kingborough Council.

<u>ATTRACTIONS AND FOOD</u>	<u>ACCOMMODATION</u>
Art at the Point	<u>North Bruny:</u>
Bligh Museum of Pacific Exploration	151 Church Street
Bruny 4x4 Forest to Coast	150 Power Road
Adventures	Lot 5 Davis Road
Bruny Island Berry Farm	43 Cox Drive
Bruny Island Cheese Company	47 Cox Drive
Bruny Island Cruises	87 Bruny Main Road
Bruny Island Cycle Tours and Hire	10 Main Road Dennes Point
Bruny Island House of Whisky	35 Main Road Dennes Point
Bruny Island Premium Wines	Beachfront on Bruny
Bruny Island Safaris	Break Away Bruny Island
Bruny Light Station	Bruny Beachside
Cullaroo Game Meats	Bruny Beach House
Dennes Point Cafe	Bruny Island Cottage
Forestvale Design Centre	Bruny Island Weekender
Get Shucked	Bruny Shore
Hiba – Bruny Island Providore	Inspirations on Bruny
Hotel Bruny	Echidna and Grasstree
Inala Nature Tours	The Lookout
Island Scenic Flights	Three Trees Retreat
Murrayfield Station	Wainui Bed & Breakfast
	<u>South-east Bruny:</u>
	970 Adventure Bay Road
	895 Adventure Bay Road
	43 Degrees Bruny Island
	26 Francis Lane, Adventure Bay

	<p>Adventure Bay Retreat Accommodation Blackwood Studio Accommodation Bruny Island Beachside Accommodation Bruny Island Ocean Cottage Bruny Island Retreat Captain Cook Holiday Park Captain's Cabin Lumeah Mavista Cottages Morella Island Retreats Parnella Quiet Corner Holiday Units Seaview Retreat Serena Lodge The Bruny Shack Wayatih Woodland Retreat</p> <p><u>South-west Bruny:</u> 60 Matthew Flinders Drive 5 Cleveland Rise 951 Cloudy Bay Road 338 Cloudy Bay Road All Angels Church House Alonnah Retreat and Bruny Island Backpackers Beachcomber Bed on Bruny Bruny Boathouse Accommodation Bruny Family Holiday Cottage Bruny Island Accommodation Services Bruny Island Coastal Retreats Bruny Island Experience Bruny Island Explorer Cottages Bruny Island Escapes Bruny Island Hundred Acre Hideaway Bruny Island Long Weekend Bruny Island Villas</p>
--	---

	<p>Cloudy Bay Beach House Cloudy Bay Cabin Daniels Bay Retreat Inala Country Accommodation Lyenna Eco Retreat Mandala Bruny Island Manfield Seaside Manfield House Maxys by the Sea Mickey's Bay Holiday Cottage Mures Cloudy Bay Retreat Omaroo Satellite Island View St Clairs Luxury Accommodation Sunset Bay Escape Te Papa Rua The Don The Tree House Wainui Bed & Breakfast Wayaree Estate White Goshawk Stay on Bruny Island</p>
--	---