

2016 - 2025

# North West Coastal Pathway & the Cycling Experience

Investment Prospectus



The North West Coastal Pathway and Cycling Experience Investment Prospectus is to be read as an addendum to the North West Coastal Pathway Plan 2010

The Cradle Coast Authority is sincerely thankful for the contribution and assistance of the many council officers and members of the Cradle Coast Cycling Coalition who have assisted in the development of the report.

## Introduction

The North West Coastal Pathway Plan (2010) was developed to guide the construction of approximately 85km of continuous shared pathway connecting coastal communities from Wynyard to Latrobe. It includes around 24km of additional connecting links (a total of approximately 110km). The original estimate for the completion of the Pathway was \$26.5M.

The Plan emerged from the five municipal Councils (Waratah Wynyard, Burnie, Central Coast, Devonport and Latrobe) that form the coastal urban strip wanting to improve connectivity and improve outcomes in tourism, economic activity, safety, health and wellbeing.

The Pathway, when completed, will connect the towns and cities of Wynyard, Somerset, Burnie, Penguin, Ulverstone, Turners Beach, Devonport and Latrobe (Figure 1). This represents a catchment of around 80,000 people which comprises around 70% of the Cradle Coast region's population. Consideration is also being given as to how the Pathway could link to the rapidly growing township of Port Sorrell.



**Figure 1 Coastal Pathway Population Centres**

The Pathway will be constructed in stages, with approximately 35kms (30%) currently complete. Responsibility for the construction of the Pathway rests with the Councils. The cost of completing the remaining sections of the Pathway is estimated at \$21.5M (63kms<sup>1</sup>).

During the construction period, the Pathway will support the employment of approximately 90 (full time equivalent) jobs. The flow on impacts (direct impact on construction sector, industrial impact and consumption impact) translates to an extra \$38.6M economic output. A preliminary economic assessment indicates that the completed Pathway would increase direct tourism expenditure by around \$8.47M pa. The total flow on impact is anticipated to be around \$17M pa, which is expected to support around 97 (full time equivalent) jobs.

<sup>1</sup> Excluding the additional connecting links.

Completion of the Pathway still require a number of challenges to overcome, however a number of sections are or are approaching development ready status. Shorter term priorities focus on completing infrastructure in and between local population centres. This is providing an immediate return on investment in terms of connectivity, recreation, health and fitness and visitor experiences and economic impact. The longer term priorities will focus on bridging the gaps between the Coastal Council areas.

LGA	Section	Cost	Distance	Development Ready
<b>WW</b>	Cam River to Port Creek	\$2.5M	8.6km	50% funding sought NSRF 3
<b>BCC</b>	Red Rock to Cam River	\$1.3M	4km	50% funding sought NSRF 3
	Marine Ter - Waterfront to Portside Pathway	\$1.55M	935m	Co-contribution from Tas Gov. Approval from TasPorts
<b>CCC</b>	Sulphur Creek to Penguin	\$2.75M	5.5km	Design Plans prepared, Require final approvals. Funding co-contribution, Approvals from DSG/TasRail
	Turners Beach to Leith (Rail Bridge)	\$900,000	900m	Development Ready, 50% funding committed, 50% sought.
<b>Total</b>		<b>\$9M</b>	<b>19.9km</b>	

**Table 1: Identified short term priorities**

There is an increasing awareness of the importance of cycling infrastructure to underpin improved social, health, and transport outcomes as well as bringing significant economic benefit to the region and state. There is a renewed commitment of the respective Councils to continue to progress the development of the Pathway.

This Addendum provides updated technical data, financial estimates and priority staging for the remaining sections. It also includes a preliminary demand and economic benefit analysis (Attachment 1) and an overview of the collegiate investment and management arrangements recently established to continue to progress the Pathway.

The Cradle Coast Authority has been charged with the responsibility of progressing the Pathway and development of a broader regional cycling experience strategy. A project control group consisting of key staff from the Coastal Pathway Councils has been established to support the development of the Pathway by 2025. There will be a collegiate approach to overall management and seeking of funds and individual Councils will design and implement the sections of the Pathway within their jurisdictions.

A project advisory group is about to be established to support the development of the Cradle Coast Cycling Experience Strategy – this group will be representative of key government and community stakeholders. The development and implementation of the Cycling Experience Strategy will be community led. Engagement with the community will commence in October 2016. It is proposed that the Strategy will include an online interactive spatial platform to engage and inform local communities and visitors to improve participation in cycling and to increase awareness and usage of the region's cycling infrastructure – this will include the Coastal Pathway, other cycling routes, Mountain Bike Parks and Trails.

While there is a major focus on cycling activities, it should be noted that much of the infrastructure will be developed for shared use.

## Strategic Context

Australia generally, and North West Tasmania in particular, are in the grip of a sedentary lifestyle crisis with 68% of Tasmanians classified as having sedentary/inadequate physical activity levels of age 18 years and over (71% in regional areas)<sup>2</sup>. This is the highest of proportion of any state in Australia and has remained relatively unchanged in the last 10 years.<sup>3</sup>

Chronic, preventable disease is creating a social and economic burden on our communities, with physical inactivity alone costing an estimated \$823.2 million to the state. New approaches are needed where physical activity becomes part of everyday life. This means giving people in and visitors to our communities the opportunity to walk, jog and or ride safely. Providing facilities to 'normalise' and enable active transport to work (e.g. riding or walking to work) is a key strategy in improving health and wellbeing outcomes for residents. The provision of cycling and shared path infrastructure is a cost effective approach when compared to other methods of dealing with the problems associated with inactivity and provides multiple benefits.

Additional benefits of cycling infrastructure include a healthier environment, less congestion, cheaper household expenditure, improved access to workplaces, more liveable and connected cities and communities, improved visitor experiences and economic growth.

Despite our relatively small and dispersed population, the region's population centres are well placed to be cycling friendly. Our relatively mild climate, flat to gently undulating coastal strip and beautiful scenery make cycling here a viable, pleasant form of transport. Our picturesque rural hinterland also provides opportunities for more challenging touring cycling experiences.

The Australian and Tasmanian Governments have policy settings and strategies for sustainable transport, health and wellbeing and infrastructure, tourism has policies and strategies - that are designed to actively encourage more people to ride.<sup>4</sup> The increased emphasis on more active forms of travel will put pressure on existing cycle infrastructure. The ongoing development of the Coastal Pathway and broader regional cycling experience strategy are crucial to ensuring that our region and communities can keep pace with the growing demand for such infrastructure.

Devonport City, Central Coast and Burnie City Councils have recently extended their networks of shared pathways. Burnie and Waratah-Wynyard Councils have also made a joint submission to the Australian Government's current Stronger Regions Fund to link Wynyard and Cooee with a shared pathway for walkers and cyclists. The Cradle Coast Mountain Bike Club has been progressively developing the Dial Range Mountain Bike Park and the Kentish and Latrobe Councils recently unveiled a master plan to create a world-class mountain-bike network at the eastern end of the region.

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<sup>2</sup> Australian Bureau of Statistics. Australian Health Survey: first results 2011-12. Canberra: ABS, 2012.

<sup>3</sup> DHHS, Health Indicators Tasmania 2013,

[https://www.dhhs.tas.gov.au/\\_data/assets/pdf\\_file/0019/132283/Health\\_Indicators\\_Tasmania\\_2013.pdf](https://www.dhhs.tas.gov.au/_data/assets/pdf_file/0019/132283/Health_Indicators_Tasmania_2013.pdf)

<sup>4</sup> Tasmanian Walking and Cycling for Active Transport Strategy, 2010; UTas Sustainable Transport Strategy 2012-2016; Australian National Cycling Strategy 2011-2016; Tasmanian Draft Cycling Tourism Strategic Action Plan, and Tasmanian Mountain Bike Plan (2009).

The region's Councils recently<sup>5</sup> confirmed the progressing of the Coastal Pathway (*pictured inset*) as its top regional priority.

While the Authority and its member councils are leading the process, a whole of government approach is required if the health and wellbeing, traffic and congestion, connectivity and liveability and economic growth benefits of an effective cycling shared path infrastructure network are to be realised.



The Coastal Pathway and related initiatives complement and contribute to a number of key Australian and Tasmanian government policy objectives. In particular, the Tasmanian government has recently released a draft Cycle Tourism Strategic Action Plan to seize new opportunities, capitalise on competitive strengths and help generate more demand for travel to Tasmania through their three priority actions: consolidating trails and routes, marketing what we already have to offer, and, providing the supporting infrastructure and services to provide the best experience once a cycling tourist arrives.

A whole of government partnership approach through Federal and State funding mechanisms would ensure that the benefits would be realised sooner and be more sustainable than if it was left solely to the Councils involved.

## Benefits and Opportunity Analysis

While there are broad ranging health and wellbeing and environment / alternative forms of transport benefits from an increased investment in cycling infrastructure, the main focus of this Addendum is on the tourism and economic benefits.

### Tourism & Events

The continued development of the Coastal Pathway will bring significant economic impact.<sup>6</sup> These benefits are increasingly being quantified / demonstrated elsewhere in Australia and overseas, particularly New Zealand and Canada.<sup>7</sup>

Tasmania's Peaks Challenge – (Devonport to Cradle Mountain) is a 13 hour cycling road event that saw 727 registrations (of which 83% were from outside Tasmania) in its inaugural year (2015) with an estimated economic input to the region of \$1.2M.

Investment in the Coastal Pathway will bring significant employment benefits in the

<sup>5</sup> 2016

<sup>6</sup> The Addendum provides a preliminary assessment – a more detailed analysis will be progressively developed.

<sup>7</sup> Nga Haerenga – NZ Cycle Trail Evaluation Report; 2013; <http://treadly.net/2007/01/05/the-economics-of-rail-trail-tourism/>

construction and post construction phases. It will also boost direct and indirect tourism expenditure.

With one of the highest unemployment rates in Australia, particularly amongst young people, the provision of infrastructure and the ongoing development of related visitor experiences will provide a significant jobs boost for the region's economy.

## Cycling Economy: Growth & Opportunities

Improved economic impacts will include:

- Increased and new economic activity for businesses from users of the pathways
- New Jobs created (during and post-construction)
- New product experience offerings – to improve spending along the region's touring routes
- There is strong evidence that recreational cyclists are a high yield, high spending and highly educated market, regularly exceeding expenditure of other visitors, thus providing numerous economic and social opportunities for regions<sup>8</sup>
- A catalyst for new regional tourism experiences associated with the bicycle market – such as local and international cycling events could be hosted in the region
- Food cycling trails – The region offers a variety of fine food and local produce which can be accessed by cyclists<sup>9</sup>
- Cyclists entering the region are likely to stay longer to undertake other cycling activities
- Local day trippers and families will utilise local assets including shared pathway, trails and MTB parks
- Bicycle Tourism is a growing and important niche market – estimated to spend around \$244 a day compared to the \$159 average spend of other regional travellers<sup>10</sup>
- Greater disposable income
  - Transport has been recognised as second only to food as the largest item of household expenditure in Australia. Bicycles are highly cost efficient and reduce the need for multiple cars
  - Cycling 10 km each way to work each day could save around A\$1700 per year



<sup>8</sup> Beeton, S. (2009) Cycling in Regional Communities: A Longitudinal Study of the Murray to Mountains Rail Trail, Victoria, Australia, Research Report, La Trobe University, Bundoora

<sup>9</sup> Follow the link for more information on the Coast to Cradle Tasting Trail - <http://www.cradletocoasttastingtrail.com.au/d/thetrail>

<sup>10</sup> Victorian regional regional experiences are being utilised as a guide until more local data is available

in transport costs (including all running costs and depreciation). Bicycle parking is usually free, easily accessible and more convenient than car parking<sup>11</sup>

Furthermore, studies have found that:

- Redeveloping business areas to promote mixed use and walkability can increase employment and visitation by 300 percent
- A 20-minute walk is as effective as medication for treating depression
- Nearly 9 in 10 people say cycling events make them look more positively on their city<sup>12</sup>
- The average benefit-to-cost ratio is 13:1 on the economic benefits of walking and bicycling interventions<sup>13</sup>
- Cycling contributes more to the local economy than the use of other transport modes because cyclists go to local shops, restaurants and cafes than users of other transport modes.<sup>14</sup>

The Growth of the Cycling Market:

- In 2012/13, approximately 1.3 million domestic overnight visitors in Australia participated in cycling during their trip representing a 21% growth in this market since 2005/06
- In 2012/13 over 1 million international visitors went cycling on a day trip representing an increase of 33% over the period from 2005/06



- This growth far outweighs growth in other soft adventure markets such as bushwalking over the same period and offers a higher ROI as cyclists visiting a destination more than other soft adventure visitors
- In 2012/13, Tasmania received 1.14 million visitors, of which 31,800 cycled while in Tasmania, representing a growth of 35.5% from the previous year. Growth in the market has been strong since 2009/10
- The average length of stay for this market segment was 17 nights which is well above the average length of stay for other visitors including

bushwalkers

- Interstate visitors who generate the majority of overnight cycling trips are from NSW (Sydney) and Victoria (Melbourne)

<sup>11</sup> Department of Transport and Main Roads, Queensland Government, 2014

<sup>12</sup> Designed to Move: Active Cities report commissioned by Nike

<sup>13</sup> Designed to Move: Active Cities report commissioned by Nike

<sup>14</sup> Transport and Mobility Leuven Research Institute

- Research suggests that cycle trail infrastructure appeals predominantly to couples aged fifty plus (Tasmania's Target Market) and families with children, who seek an experience that allows them to spend quality time with friends and family. The Coastal Pathway gradient will be predominantly less than 3 degrees, encouraging use by almost all population groups, regardless of age and mobility.

The North West Cycling Visitor Experience:

- North-West Tasmania's cool climate and stable weather (relative to the mainland) makes Tasmania and the North West an attractive for cyclists
- The North West is supported by ready access to off island markets through the Spirit of Tasmania and airports (Burnie & Devonport) - one hour by sea and 10 hours by boat from Australia's fastest growing market – Melbourne
- The Coastal Pathway will leverage Tasmania's established, high profile reputation as a nature-based and soft adventure tourism destination, with the potential to bundle cycling activities with other tourism products, including food, wine and historic heritage in the region
- The Coastal Pathway aligns with Tasmania's increasing reputation as a cycling destination and complements other cycling trails around the State
- The Coastal Pathway hugs the North West coastline, offering a unique, outstanding natural coastal scenery and opportunities for cyclists and walkers to experience Tasmanian landscapes and terrains within a short period of time and to explore the villages and communities along the way
- Personal, niche and unique experiences await in the small coastal communities, often not visited by those driving on the highway
- The relatively easy and scenic experiences of the Coastal Pathway will complement and contrast with the adventure and fitness seeking experiences of mountain bike parks / trails and major road events such as from the Coast to the North West Tasmania Coastal Pathway
  - The Dial Range Mountain Park (Central Coast) is home to the iconic Cranky Penguin event
  - The proposed Warrawee and Wild Mersey (Kentish & Latrobe) mountain bike trails will effectively link the coast to Cradle Mountain



Image Courtesy: Tourism Tasmania & Rick Eaves

## Estimated Economic Impact<sup>15</sup>

During the construction period, the Coastal Pathway will support the employment of approximately **90 full time equivalent jobs**. The flow on impacts (direct impact on construction sector, industrial impact and consumption impact) of this many supported jobs translates to an extra **\$38.6M economic output**.

Post-construction it is estimated that the Coastal Pathway will contribute a total **\$17M per annum through increase direct and indirect expenditure** from tourists and community in the region. This translates to **97 full time equivalent jobs**.

It is estimated that when fully completed, the Coastal Pathway **will generate around 106,886 trips each year**. This includes short and long trips. This equates to:

• Local users	80,500
• Intra-state visitors	10,575
• International / inter-state visitors	15,905
	<u>106,886</u>



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<sup>15</sup> See attachment 1 for explanatory notes

## The North West Coastal Pathway Staged Development

### Coastal Pathway – Key Sections

Section	Indicative Costs <sup>1</sup> (\$M)
Burnie → Wynyard	5.7 <sup>2</sup>
Sulphur Creek → Ulverstone	3.8
Forth Rail Bridge Reuse	0.9
Turners Beach → Devonport	5.6
Devonport → Latrobe → Port Sorell	5.9
Proposed Latrobe → Sheffield (MTB)	4.1 <sup>16</sup>
	<b>\$21.9M<sup>3</sup></b>

<sup>1</sup> Based on information from the North West Tasmania Coastal Pathway (2010) report and additional updated information provided by councils.

<sup>2</sup> Assumed existing rail infrastructure including track and ballast are removed by TasRail

<sup>3</sup> Total does not include cost of Mountain Bike Park Latrobe → Sheffield. If this was included, total cost would be \$25.8M.

### Staged Development<sup>17</sup>

The Development of the Coastal Pathway is complex. There are some identified challenges to be addressed with some sectors of the Pathway. A staged program is being created to progress sectors that are development ready, while the longer term challenges are being addressed.

The indicative priorities reflect:

Short term <sup>18</sup> :	Years 1 - 2 - Reflect development / almost development ready. That is projects that meet <i>likely or are already compliant</i> requirements of Council planning requirements. They are also sectors close to / connect local population centres
Medium term:	Years 3 – 4 - Sectors that are close to / connect local population centres but are not yet <i>likely compliant</i> , but do not have any major identified barriers to development
Longer term:	Year 5 plus - Sectors that connect major communities within the region and or have major identified barriers to development

<sup>16</sup> Links with the Latrobe / Devonport Coastal Pathway and so has been included for context

<sup>17</sup> The priority timing is based on the assumption that additional external funding is available

<sup>18</sup> With the exception of the Burnie Wynyard Rail Trail, the other short term priorities do not yet have any funding allocated.

## Short Term Priority Sectors

The short term priorities - \$9M

LGA	Section	Cost	Distance	Development Ready
WW	Cam River to Port Creek	\$2.5M	8.6kms	50% funding sought NSRF 3
BCC	Red Rock to Cam River	\$1.3M	4kms	50% funding sought NSRF 3
	Marine Ter- Waterfront to Portside Pathway	\$1.5M	935m	Funding Co-contribution from Tas Gov, approval from TasPorts to build cantilevered platform
CCC	Sulphur Creek to Penguin	\$2.7M	5.5kms	Design Plans have been prepared by PDA, final approvals required. Funding Co-contribution, Approvals from DSG and TasRail
	Turners Beach to Leith (Rail Bridge)	\$900K	900m	Development Ready, 50% funding committed, 50% sought.

## Medium Term Priority Stages

LGA	Section	Cost	Distance	Development Ready
BCC	Fernglade Pathway	\$500K	1.4kms	To fund from 2016/17 allocation. Seeking funding from Roads to Recovery
CCC	Penguin – Ulverstone (222 Penguin Rd to Goat Is) (Goat Is to Westland Dr)	TBA \$500K	6.3kms	Funding Co-contribution
	Ulverstone (Beach Road)	\$750K	1.2kms	Funding Co-contribution
	Ulverstone to Leith	\$1.1M	2.2kms	Funding Co-contribution (excluding Rail Bridge)
DCC	Leith to Don	\$3.1M	7kms	Tas Rail, DSG negotiation, land owner negotiation

## Long Term Priority Stages

LGA	Section	Cost	Distance	Development Ready
BCC	Round Hill (Wivenhoe to Heybridge)	TBA	6kms	No work to date, yet to find route for off high-way path
DCC	Tea Tree Ln to Port Sorell	\$400K	1.5kms	Land owner negotiation
	River Rd to Latrobe	\$650K	2.5kms	Concept design phase
LC	Latrobe to River Rd	\$2.4M	5kms	Unscheduled Project, seeking external funding
	Port Sorell to Devonport	\$3.5M	12kms	Future link opportunity

# North West Coastal Pathway

as at June 2016





## ATTACHMENT 1

## Economic Analysis Assumptions

**Construction Period**

During the construction period, the NWCP will support the employment of approximately 88 FTEs. The flow on impacts (direct impact on construction sector, industrial impact and consumption impact) of this many supported jobs translates to an extra \$37.74M output.

**Impact Summary****Modelling the effect of adding 88 jobs in Construction - Inflation adjusted**

Summary	Output (\$m)	Value-added (\$m)	Wages & salaries (\$m)	Local jobs	Residents jobs
Starting position Cradle Coast Region (year ended June 2014)					
Construction	1,165	331	208	4,256	4,463
All industries	9,149	4,654	2,789	48,230	49,720
Direct Impacts					
Construction sector	24.09	6.85	4.31	88	
Industrial impact	8.15	2.90	1.77	34	
Consumption impact	5.50	3.03	1.76	37	
<b>Impact on Cradle Coast Region economy</b>	<b>37.74</b>	<b>12.79</b>	<b>7.83</b>	<b>159</b>	<b>105</b>
Indirect Impacts					
Type 1 multiplier (direct & industrial)	1.34	1.42	1.41	1	
Type 2 multiplier (direct, industrial & consumption)	1.57	1.87	1.82	2	
<b>Impact outside Cradle Coast Region</b>	<b>10.8</b>	<b>5.8</b>	<b>-7.8</b>	<b>66</b>	<b>120</b>
<b>Impact on Tasmanian economy</b>	<b>48.6</b>	<b>18.6</b>	<b>0.0</b>	<b>225</b>	<b>225</b>

Source: [National Institute of Economic and Industry Research \(NIEIR\)](#) ©2015. Compiled and presented in economy.id by [.id](#), the population experts.  
Note: All \$ values are expressed in 2012-13 base year dollar terms.

Total construction costs are expected to be between \$22-26M<sup>19</sup> based on work to date with an average of \$336,500 per kilometre (dependant on construction method and materials).

One FTE is supported for every \$250,000 in construction expenditure.

<sup>19</sup> This is dependent on whether this includes the construction of the Kentish MTB Park

### Post-construction period

Post-construction it is estimated that the NWCP would contribute a total \$17M per annum through increase direct and indirect expenditure from tourists and community in the region.

Every \$1M of direct tourism expenditure supports 11.4 FTE jobs<sup>20</sup>

Direct Expenditure	Indirect Expenditure	Total Output	Jobs (FTEs)
\$8,471,346	\$9,149,053	\$17,620,399	96.6

### Forecast for Demand for the Coastal Pathway<sup>21</sup>

There is no survey to specifically quantify the market demand. Instead, demand has been estimated through analysis of other sources such as:

- Competitor data (various events)
- Trails usage in Tasmania
- Recreational activities undertaken by visitors (TVIS data)
- Market trends in cycling participation
- Market trends / visitor behaviour

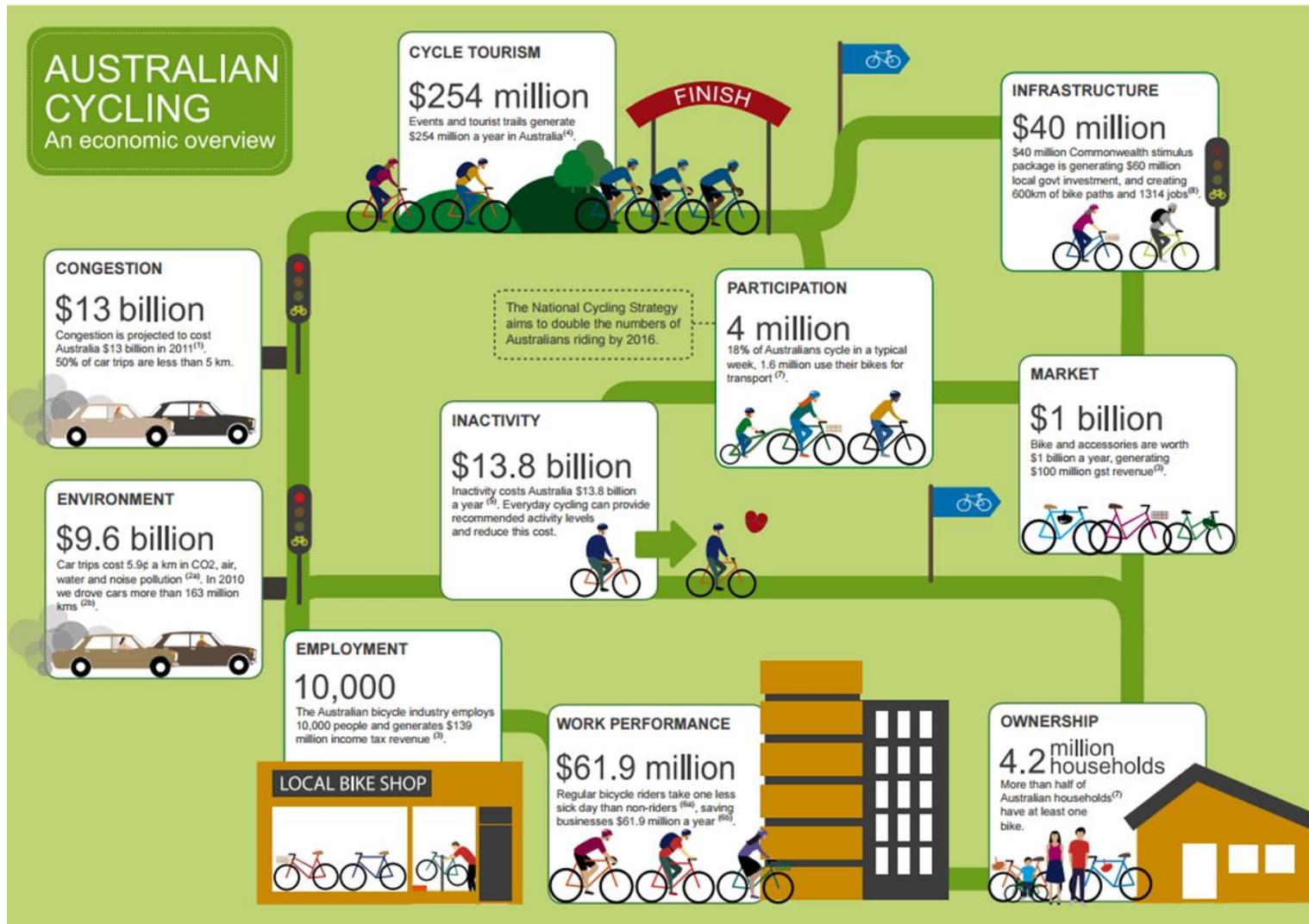
It is estimated that when fully completed, the Coastal Pathway will generate around 106,886 trips each year. This includes short and long trips. This equates to:

- Locals: 80,500
- Intrastate visitors 10,575
- International / interstate visitors 15,905
- 106,886**

<sup>20</sup> Tourism Research Australia, 2010

<sup>21</sup> Assumptions have been developed and can be provided if required

**Attachment 2**  
 Australian Cycling Economy at a Glance<sup>22</sup>



<sup>22</sup> [http://austroads.com.au.tmp.anchor.net.au/abc/images/pdf/the\\_australian\\_cycling\\_economy.pdf](http://austroads.com.au.tmp.anchor.net.au/abc/images/pdf/the_australian_cycling_economy.pdf)



**Attachment 3**

**Cycling Benefits – The benefits are bigger than you think<sup>23</sup>**



<sup>23</sup> Figure from ©Nike, Inc. (2012), DESIGNED TO MOVE: Active Cities Report. Retrieved from: <http://e13c7a4144957cea5013-f2f5ab26d5e83af3ea377013dd602911.r77.cf5.rackcdn.com/resources/pdf/en/active-cities-full-report.pdf>



## **Attachment 4**

### **Related Documents and Sources**

#### **Tasmanian Government Strategies**

- Tasmanian Draft Cycling Tourism Strategic Action Plan (2016)
- Events Strategy 2015-2020
- T21 Visitor Economy Strategy
- Trails Tasmania Strategy (2007)
- Tasmanian Mountain Bike Plan (2009)

#### **Other cycling related strategies and plans**

- Building for the future Strategy 2016-2019, Cycling Tasmania
- Central Coast Cycle Strategy 2014-2019, Central Coast Council
- Devonport City Council, Bike Riding Strategy 2015-2020, Devonport City Council
- Dial Range Strategic Plan 2015, Cradle Coast Mountain Bike Club (2015)
- North West Tasmania – Coastal Pathway Plan, Cradle Coast Authority (2010)
- Warrawee Reserve Mountain Bike Trails Master Plan, TRC Tourism (2016)
- Wild Mersey – Mountain Bike Development, Kentish & Latrobe Councils

#### **Market information**

- A longitudinal study of the Murray to the mountains, Rail trail, Victoria, Australia, Professor Sue Beeton
- Cycle Tourism in Australia – an investigation into its scope and size, Sustainable Tourism CRC (2007)
- Mountain Bike Tourism Market Profile for Tasmania - December 2008. Prepared for Tourism Tasmania