Social Analysis of Sustainable Tourism Development as a Contributor to the Economic Development of Tasmania

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**Social Analysis of Sustainable Tourism Development as a Contributor to the Economic Development of Tasmania**

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**Purpose of Report**  
The study was commissioned by the Department of the Environment to support regional sustainability planning. The purpose of study was to explore the attitudes towards sustainable tourism development in sensitive areas recognised for the presence of Matters of National Environmental Significance (MNES) in Tasmania. The report is an output of the Landscapes and Policy Research Hub.  

Please cite the report as follows:  

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EXECUTIVE SUMMARY

We sought to understand stakeholders’ attitudes towards sustainable tourism development in sensitive areas recognised for the presence of Matters of National Environmental Significance (MNES). The research was conducted in three significant regions of Tasmania: the Tarkine, the Bay of Fires and the Bathurst Harbour. To achieve this aim, we considered three research questions:

Research Question 1: What are stakeholders’ attitudes towards sustainable tourism development in sensitive areas in Tasmania, particularly those recognised for the presence of MNES?

We explored the attitudes towards sustainable tourism development in the three case study regions. It was conducted using three iterative phases of research. Given that a core component of sustainable tourism is the ability to meet the needs of the host community, the research team first explored the attitudes of Tasmanian stakeholders, including local residents, community groups, tourism operators and regulators. We did this in Phase 1 by conducting interviews that were designed to elicit attitudes towards tourism development. Specifically we employed the Q sort method, an innovative approach that requires respondents to rank photographs of different styles of development in order of preference and describe their choices. The photographs were selected to represent different points along a Sustainable Nature Based Tourism Spectrum that was developed by the research team. The outcome of these interviews were statistically derived attitude clusters that grouped stakeholders with similar attitudes towards tourism development in each of the case study regions.

Tarkine

In the Tarkine, we interviewed 38 stakeholders (including local residents, tourism operators, regulators and members of community groups). From these individuals, three attitude clusters emerged. These were:

- ‘Protectionists’ — who supported an increase in minimal impact tourism and believed there was a need to support the range of activities available to all tourists, including elderly and disabled.

- ‘Multi–Users’ — who wanted to encourage tourism to the Tarkine that enables people to access and experience the region. They valued activities that could be done by the family and were accessible to the less fit or able, including motorised activities such as motorbike riding, four–wheel driving and quad biking.

- ‘Rugged Pragmatists’ — who were concerned with providing low impact opportunities for visitors, including activities and a range of accommodation options.
For Phase 2 of our study in the Tarkine, we asked 55 tourists to rank tourism development scenarios that had been developed from the results of Phase 1. In the case of the Tarkine, their preferences aligned strongly with Protectionists, suggesting the potential for conflict with stakeholders preferring other forms of development and a real need for consultation over future tourism development. Despite a strong desire for minimal impact forms of tourism development in the Tarkine, 38% of domestic tourists wanted more tourists to visit the region. A little over half wanted the same amount of tourists to the Tarkine and only 5% wanted fewer.

**Bay of Fires**

In the Bay of Fires, we interviewed 43 stakeholders (including local resident, operators, regulators and members of community groups). From these, three attitude clusters emerged. These were:

- **‘Engagers with Nature’** — who wanted additional promotion of the area, additional infrastructure to accommodate tourists (including activities and information), and supported indigenous cultural heritage options. Ironically, they advocated lower overall tourism in the areas. They were critical of intrastate tourists who did not spend much money and filled campsites preventing interstate or international tourists from staying.

- **‘Environmental Accommodators’** who value the Bay of Fires’ unspoilt natural beauty and sense of remoteness but felt that tourism is limited by a lack of visitor facilities, inaccessibility and over regulation. There was a clear recognition of the differing perspectives on tourism in the region.

- **‘Outdoor Recreationists’** — who valued its relatively untouched natural beauty offering opportunities for relaxation and activities such as fishing, walking and picnics. They had a focus on outdoor activity and believed that there should be a spectrum of activities including horse riding, consumptive and mechanised activities as these popular with tourists, and also preferred activities of respondents.

Of all the stakeholder groups we interviewed, only local respondents wanted lower numbers of tourists in the Bay of Fires region, while most tourists wanted the number of tourists to remain the same.

For Phase 2 in the Bay of Fires, we asked 65 tourists to rank their preference for tourism development, based on the attitude clusters that emerged from Phase 1. Tourists’ strongest preference was for the Engagers with Nature, reflected by their strong interest in nature based tourism and cultural sites.
**Bathurst Harbour**

In Bathurst Harbour, we interviewed 14 stakeholders (including operators, regulators and members of community groups). There is no permanent local population living in this remote region, thus ‘local residents’ were not relevant. From this phase, two attitude clusters emerged. These were:

- **‘Immersive Engagers’** — who wanted tourism to be controlled to ensure minimal environmental impact, and for it to retain the existing character of remoteness. They believed access to the area needs to continue via boat or plane or foot, and that numbers may need to be restricted.

- **‘Immersive Planner’** — endorsed a tourism experience that was focused on enjoying the natural environment but in a way that has minimal impact on the environment. To this end, they endorsed the use of visually non-intrusive infrastructure, such as tent platforms, to minimise impact on the environment.

Phase 2 of the research in Bathurst Harbour involved testing these preferences against 17 tourists in the region. Difficult access and very low visitor numbers, plus a reliance on volunteers, made this process difficult and as a result, the response rates were very low. Respondents were evenly split in their preferences for the two attitude clusters. Interestingly, the tourists that were most closely aligned with Immersive Engagers preferred the same number of tourists to visit the region, whilst those tourists who aligned with Immersive Planners wanted more tourists in the region.

**Research Question 2:** *Do the attitudes of these stakeholder groups towards sustainable tourism development in single locations recognised for the presence of MNES differ to their attitudes towards sustainable tourism development in multiple locations recognised for the presence of MNES?*

The results of stakeholders’ attitudes towards the cumulative impact of tourism development are not clear cut. This issue was investigated via interviews with both Tasmanian stakeholders and tourists. The goal was to determine respondents’ preferences for development in all the three of the case study regions, and specifically to determine if they remained the same as their attitude cluster for their region of origin (that is, Tarkine, Bay of Fires and Bathurst Harbour).

The study provided three key insights:

- Preference for the level of development across all three regions was not aligned to particular stakeholder groups (that is, local residents, operators, regulators or members of community groups).

- There is a lack of awareness of the range of tourist destinations in Tasmania, particularly in the case of for tourists. This suggests that further work needs to be done to understand cumulative development preferences when knowledge is low.

- While stakeholders and tourists exhibited different preferences, there was a shared sense that visitor access should be allowed to all three regions.
The similarity of the attitudes expressed towards sustainable tourism development across the three regions led to the development of three state-wide tourism scenarios (Environmental Engagers; Outdoor Multi-users and Environmental Pragmatists). The state-wide scenarios illustrate that Environmental Engagers expressed a preference for differential levels of development across the state reflecting site specific values and current levels of development (that is, emerging, developed etc.), while Environmental Pragmatists and Outdoor Multi-users expressed the view that their development preferences occur within all three regions.

**Research Question 3:** What are the likely economic impacts of sustainable tourism development on marginal rates of visitation for selected areas recognised for the presence of MNES in Tasmania?

To answer the third research question, we undertook economic impact analysis in an exploratory manner, to investigate the possible changes to the Tasmanian economy. These were based on the characteristics of the three state-wide attitudinal clusters. To determine this, the research team used tourism projections from Deloitte Access Economics (2013) and State Tourism Satellite Accounts (Pham, Kookana & Silec 2013).

As our primary data did not explicitly collect tourist expenditure or growth figures for each of the clusters, we made assumptions to derive the estimates of percentage change based on previous studies;

**Scenario 1** Environmental Engagers — This is considered the baseline scenario with a continuation of current tourist numbers, spend and development.

**Scenario 2** Outdoor Multi-Users — This scenario is expected to attract about the same number of tourists, but with differential development across the state there is likely to be an increase in tourism expenditure. This is modelled as compounding growth starting at 1% and growing to 10% (a marginal annual increase of 1% per year).

**Scenario 3** Environmental Pragmatists — This scenario is expected to attract more tourists, growing up to 5% (annually 1%, 3% and then 5% cumulative growth per annum) but with the same expenditure pattern as in the baseline scenario.

It should be noted that these projected changes are reasonable and within the experience of other tourism studies (see Deloitte Access Economics 2013). Overall, the work assumed that the Environmental Engagers category was a baseline for the state tourism industry. Therefore, changes were made in tourist numbers and expenditure to investigate the marginal change in direct and indirect tourist expenditure associated with the two other scenarios. Results indicated that higher direct and indirect expenditure would be made by Environmental Pragmatist and Outdoor Multi-Users, due to their desire for more value added tourism products such as guided tours, use of motorised vehicles such as quad bikes and non–motorised activities such as fishing. The research was able to identify some possible advantages to the Tasmanian economy if the tourism market was to expand current tourism product, in some areas, to tap into these two attitude clusters (Environmental Pragmatist and Outdoor Multi–Users).
Recommendations

The implications of this study may be categorised into a number of different recommendations. We have divided these into three sections: policy implications, research implications and tourism industry implications.

Recommendations for Policymakers

1. Both the state–wide and regional attitudinal clusters in this study identified the level of tourism development that stakeholders are willing to ‘bear’. In the Tarkine and Bay of Fires, three clear attitudinal clusters emerged, while in Bathurst Harbour we identified two. For policy makers, these attitudinal groups may prove useful for the design of future tourism development policies and approval processes.

2. This research highlighted the highly parochial nature of Tasmania. We elicited clear differences in attitudes between the regions in terms of their tourism preferences. We recommend that policymakers consider this and develop tourism policy that is sensitive to regional differences.

3. The research focused on developing sustainable tourism scenarios, based on the preferences of Tasmanian stakeholders and tourists to Tasmania. The scenarios were developed from photographs that graphically represented sustainable tourism options only. Arguably, sustainable tourism destinations and attractions have the potential to compete with cultural and creative tourism attractions and festivals. The research team recommends that this study should be viewed only as one that addresses sustainable tourism preferences. Further research is necessary to elicit preferences for cultural and creative tourism attractions and festivals and their relationship to sustainable tourism products. This is necessary to ensure that one sector is not given preference to the detriment of the other.

4. We recommend that future tourism development applications ensure that stakeholder consultation occurs with a broad cross section of stakeholders, including local community members, members of community non–governmental organisations, tourists, operators and those in regulatory positions.

5. The results highlighted simmering tensions in the Bay of Fires and Tarkine over the potential loss of local amenities as a result of increased tourism development. We recommend that future policy makers consider the creation of ‘zones’ to ensure that that locals retain their recreational amenities, and tourism opportunities and infrastructure occurs in geographically different parts of the region.

6. Generally, stakeholders positively viewed future development and increased tourism numbers in the Bay of Fires and Tarkine. This willingness to bear greater tourism numbers and sustainable tourism development suggests that policy makers may consider streamlining approval processes for tourism development in Tasmania.
Recommendations for the Tasmanian Tourism Industry

1. The approval process for tourism development in protected areas is often debated in Tasmania. This research has revealed willingness for specific forms of tourism to be developed and for tourism numbers to increase in some cases. The findings of this study suggest that there would be support from a range of stakeholder groups for streamlining approval processes for sustainable tourism development.

2. There is need to strengthen the tourist data set. Further research should be undertaken to reveal whether the opinions of tourists in a particular case study region differ from those who visit other parts of Tasmania. Similarly, further research is also needed to elicit whether those who do not visit Tasmania at all, but are aware of the Tarkine, have differing opinions on how tourism development should occur in the region.

3. This study relied on visitation data that has been generated on a state-wide scale as our research revealed a dearth in regional tourism data. We recommend that further research be conducted in order to understand the numbers of visitors to the Tarkine, Bay of Fires and Bathurst Harbour, and their movement within these regions.

Recommendations for Future Tourism Research

1. This research revealed that attitudes towards tourism development in Tasmania did not align with stakeholder groups. Significantly, this finding challenges traditional approaches to stakeholder analysis, whereby assumptions are often made that stakeholders’ views align with their stakeholder group. The findings from this study suggest the need for further research to explore this phenomenon in more detail.

2. Although the study was able to elicit stakeholders’ attitudes towards tourism development and the reasoning behind the forms of tourism development that they liked or disliked, further research is need to explore the relationship between participants attachment to the case study region and whether this affected their preferences for tourism development.

3. This research utilised a novel methodology, which proved particularly useful in regions where the communities were sceptical of research, or felt they were ‘over-surveyed’. Its visual nature would also be very useful in regions where literacy rates may be low, or if English was not participants’ first language. Further research into the use of novel methodologies as a technique to increase community engagement in research is recommended.
# Contents

**EXECUTIVE SUMMARY** ........................................................................................................... 1  
**Recommendations** .................................................................................................................. 5  
**Glossary of Commonly Terms** ................................................................................................. 10  
**Frequently Used Abbreviations** .............................................................................................. 11  

## CHAPTER 1 Introduction ........................................................................................................... 12  
1.1 Aim ........................................................................................................................................ 12  
1.2 Rationale for the process ......................................................................................................... 12  
1.3 Case study regions .................................................................................................................. 14  
1.4 The presence of Matters of National Environmental Significance ........................................... 15  
1.5 Relationship of this study to the situation in Tasmania ......................................................... 16  
1.6 Sustainable tourism development .......................................................................................... 17  
1.7 Stakeholder analysis .............................................................................................................. 18  
1.8 Economic impacts of tourism ................................................................................................ 18  
1.9 Report outline ...................................................................................................................... 19  

## CHAPTER 2 The Research Process ............................................................................................. 21  
2.1 Selection of the case study areas ............................................................................................ 21  
2.2 Identifying stakeholder groups ............................................................................................. 23  
2.3 Selection of multiple methods ............................................................................................... 24  
2.4 Phase 1: Face–to–face interviews and the use of photography and visual methods in research  .................................................................................................................................... 27  
2.5 Use of the Q method ............................................................................................................ 28  
2.6 The selection of photographs for the Q sort .......................................................................... 28  
   2.6.1 Ecotourism and sustainable tourism spectrums ................................................................. 28  
   2.6.2 Selection of photographs against the spectrum .............................................................. 32  
2.7 Quantitative analysis of the Q sort data ................................................................................ 35  
2.8 Qualitative analysis of the Q sort data .................................................................................. 36  
2.9 Phase 2: Testing tourists preferences for different scenarios of tourism development ......... 37  
2.10 Phase 3: Forecasting the economic impacts of the tourism scenarios .................................. 38  
2.11 Summary .......................................................................................................................... 41  

## CHAPTER 3 The Tarkine .............................................................................................................. 42  
3.1 Introduction ........................................................................................................................... 42  
3.2 Background to the Tarkine region .......................................................................................... 42  
3.3 The research experience ........................................................................................................ 44  
3.4 Phase 1: Results of the stakeholder Q sort .......................................................................... 47  
   3.4.1 Tasmanian’s attitude clusters ........................................................................................ 47  
   3.4.2 Principles underpinning the development of the attitude clusters ............................... 47  
   3.4.3 Attitude Cluster 1: Protectionists ................................................................................. 47  

---

Page | 7
CHAPTER 3.5

3.5.1 Tourists’ preferences for attitude clusters ................................................................. 59
3.5.2 Tourists’ preferences for tourism development ......................................................... 61
3.5.3 Tourists’ visitation characteristics .............................................................................. 62

3.6 Summary ......................................................................................................................... 65

CHAPTER 4 Bathurst Harbour .......................................................................................... 66

4.1 Introduction .................................................................................................................... 66
4.2 Background to the Bathurst Harbour Region ............................................................... 67
4.3 The research experience .............................................................................................. 68
4.4 Phase 1: Results of the stakeholder Q sort .................................................................. 69
  4.4.1 Tasmanian attitude clusters .................................................................................... 69
  4.4.2 Principles underpinning the development of the attitude clusters ......................... 69
  4.4.3 Attitude Cluster 1: Immersive Engagers ................................................................. 69
  4.4.4 Attitude Cluster 2: Immersive Planners ................................................................. 72
4.5 Phase 2: Assessment of tourists’ preferences for tourism development ................. 76
  4.5.1 Tourists’ preferences for attitude clusters .............................................................. 76
  4.5.2 Tourists’ preferences for tourism development in Bathurst Harbour .................. 77
  4.5.3 Tourists’ visitation characteristics ........................................................................ 78
4.6 Summary ......................................................................................................................... 80

CHAPTER 5 Bay of Fires .................................................................................................. 81

5.1 Introduction .................................................................................................................... 81
5.2 Background to Bay of Fires ......................................................................................... 81
5.3 The research experience .............................................................................................. 85
5.4 Phase 1: Results of the stakeholder Q sort .................................................................. 86
  5.4.1 Tasmanian attitude clusters .................................................................................... 86
  5.4.2 Principles underpinning the development of the attitude clusters ......................... 86
  5.4.3 Attitude Cluster 1: Engagers with Nature ................................................................. 86
  5.4.4 Attitude Cluster 2: Environmental Accommodators .......................................... 91
  5.4.5 Attitude Cluster 3: Outdoor Recreationists ............................................................. 95
5.5 Phase 2: Assessment of tourists’ preferences for tourism development ................. 98
  5.5.1 Tourists’ preferences for attitude clusters .............................................................. 99
  5.5.2 Tourists’ preferences for tourism development ...................................................... 102
  5.5.3 Tourists’ visitation characteristics ........................................................................ 103
5.6 Summary ......................................................................................................................... 105
CHAPTER 6 Economic Analysis ................................................................. 106
  6.1 Introduction ....................................................................................... 106
  6.2 Cumulative impacts .......................................................................... 107
  6.3 Stakeholder cumulative impacts ..................................................... 107
    6.3.1 Tourists’ cumulative interests .................................................. 111
  6.4 Tourism development scenarios ..................................................... 113
    6.4.1 State–wide development scenarios ....................................... 114
    6.4.2 Results for state–wide scenarios .......................................... 116
  6.5 Possible economic impact of scenarios ........................................... 119
  6.6 Summary ........................................................................................... 124
Chapter 7 Conclusions ........................................................................... 126
  7.1 Summary of Findings ........................................................................ 126
  7.2 Research innovation ......................................................................... 128
    7.2.1 Attitude clusters across region and state ................................ 128
    7.2.2 Q method innovations ............................................................ 128
    7.2.3 Innovations in stakeholder theory .......................................... 129
    7.2.4 Development of a new sustainable tourism development spectrum .................................................. 129
  7.3 Limitations ......................................................................................... 131
  7.4 Recommendations ............................................................................ 132
REFERENCES ............................................................................................ 134
APPENDICIES .......................................................................................... 138
  A. Sustainable Tourism Spectrum ....................................................... 139
  B. Stakeholder Interviews .................................................................... 141
  C. Tourist Interviews ............................................................................ 152
  D. Photos used in Q Sort ...................................................................... 160
Glossary of Commonly Terms

Throughout the report, we use some certain ‘commonly used terms’ but in a very specific sense to describe aspects of the research and the application of the Q method of research.

<table>
<thead>
<tr>
<th>Attitude Cluster</th>
<th>A group of like-minded stakeholders who have similar desires for sustainable tourism development.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct tourism outputs</td>
<td>Goods and services that have direct physical contact with tourists (for example, hotels, restaurant meals).</td>
</tr>
<tr>
<td>Indirect tourism output</td>
<td>Goods and services that do not come into contact with tourists (for example, petrol purchase, as the petrol is not produced by the retail petrol station).</td>
</tr>
<tr>
<td>Locals</td>
<td>Tasmanians whose primary residence is in one of the case study regions studied.</td>
</tr>
<tr>
<td>Members of Community Groups</td>
<td>Persons who belong to a community group with an interest in one of the three case study areas.</td>
</tr>
<tr>
<td>Operators</td>
<td>Owners/ managers of tourism businesses in Tasmania.</td>
</tr>
<tr>
<td>Q method</td>
<td>A research method where participants sort a wide range of statements or photographs in order to indicate their preferences. Participants’ Q sorts are analysed to identify common patterns.</td>
</tr>
<tr>
<td>Q sort</td>
<td>The process where individual participants sort statements of photographs into a distribution continuum.</td>
</tr>
<tr>
<td>Regulators</td>
<td>Persons employed by either a government or a governing body with a key influence over the policy and direction of tourism in Tasmania.</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>People who affect, or are affected by tourism development in the case study region.</td>
</tr>
<tr>
<td>Tourism GSP</td>
<td>Gross State Product is the total market value of goods and services produced in the state after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. GSP is GVA plus net taxes on products.</td>
</tr>
<tr>
<td>Tourism GVA</td>
<td>Gross Value Added is the value of output at basic prices minus the value of intermediate consumption at purchasers’ prices. The term is used to describe gross product by industry. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries.</td>
</tr>
<tr>
<td>Tourists</td>
<td>For this study only, we think of a tourist as those people whose primary place of residence is in a state other than Tasmania.</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
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</tr>
<tr>
<td>ECOS</td>
<td>Ecotourism Spectrum</td>
</tr>
<tr>
<td>EPBC Act</td>
<td>Environment Protection and Biodiversity Conservation Act 1999</td>
</tr>
<tr>
<td>FTE</td>
<td>Full Time Equivalent</td>
</tr>
<tr>
<td>GSP</td>
<td>Gross State Product</td>
</tr>
<tr>
<td>GVA</td>
<td>Gross Value Added</td>
</tr>
<tr>
<td>MNES</td>
<td>Matters of National Environmental Significance</td>
</tr>
<tr>
<td>NERP</td>
<td>National Environmental Research Programme</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-Government Organisations</td>
</tr>
<tr>
<td>OUV</td>
<td>Outstanding Universal Value</td>
</tr>
<tr>
<td>PQMethod</td>
<td>Statistical Software Package used in Q data analysis</td>
</tr>
<tr>
<td>ROS</td>
<td>Recreation Opportunity Spectrum</td>
</tr>
<tr>
<td>SPSS</td>
<td>Statistical Package for the Social Sciences</td>
</tr>
<tr>
<td>TOS</td>
<td>Tourism Opportunity Spectrum</td>
</tr>
<tr>
<td>TVS</td>
<td>Tourism Visitor Survey</td>
</tr>
<tr>
<td>TWWHA</td>
<td>Tasmanian Wilderness World Heritage Area</td>
</tr>
</tbody>
</table>
CHAPTER 1
Introduction

This study explored the attitudes towards sustainable tourism development in three case regions of Tasmania: the Tarkine, the Bay of Fires and the Bathurst Harbour region. Given that sustainable tourism is dependent on the needs of multiple stakeholders being considered, this research first explored the attitudes of Tasmanian stakeholders, resulting in attitudinal clusters of preferred tourism development being developed. Following this, the attitudinal clusters were tested with domestic tourists to Tasmania to decipher what form of tourism development was preferred.

The study used economic analysis to explore the likely economic impacts and develop tourism development scenarios that were linked to current visitation trends to Tasmania.

The outcomes of this research were a series of recommendations for acceptable tourism development scenarios that can inform local and regional planning frameworks in Tasmania.

1.1 Aim

This study provides focused research into tourism stakeholders’ understanding of and attitudes towards sustainable tourism development in sensitive areas recognised for the presence of Matters of National Environmental Significance (MNES) in Tasmania with a focus on the Outstanding Universal Value (OUV) of world heritage places.

1.2 Rationale for the process

In recent years, Tasmania experienced a decline in the numbers of visitors to regional areas despite a small increase in overall visitor numbers. One possible option to stimulate development in the regions is to encourage sustainable tourism development. A recent trend in tourism has been the development of ecologically sustainable developments such as extended walk opportunities and accommodation businesses or attractions, located within or adjacent to protected areas. It is thought that developments such as these attract a high yielding visitor. However, what is unknown is how socially acceptable these developments are to the range of stakeholders that are impacted by tourism in Tasmania, and the likelihood that sustainable tourism development will increase the rates of visitation to these areas.

The research questions for this study were as follows:

1. What are stakeholders’ attitudes towards sustainable tourism development in sensitive areas in Tasmania, particularly those recognised for the presence of MNES?
2. Do the attitudes of these stakeholder groups towards sustainable tourism development in single locations recognised for the presence of MNES differ to their attitudes towards sustainable tourism development in multiple locations recognised for the presence of MNES?
3. What are the likely economic impacts of sustainable tourism development on marginal rates of visitation for selected areas recognised for the presence of MNES in Tasmania?
Tasmania presented unique challenges in a study such as this. The first was that it is an island state with a small population and one that has many areas which are of such value that they trigger the MNES legislation. However, despite the small population, localities and stakeholders within them vary widely in terms of their average age, primary source of income, involvement in tourism and political views. Similarly, the state’s environment also differs widely, as does the role of tourism within the regions and the land tenure within them.

Therefore, the challenge for this study was to design a study that would allow the diversity of stakeholders who exist within and across the regions to be involved. In Tasmania, literacy rates are very low and this presented particular limitations in terms of research design. An additional challenge was to design research that would allow the regional differences in stakeholder opinions across to emerge, but at the same time allow for stakeholders’ attitudes towards cumulative tourism impacts across the entire state of Tasmania to emerge. In order to do this, the following objectives were set:

1. To develop a thorough understanding of stakeholders’ attitudes towards sustainable tourism development in areas recognised for the presence of MNES across Tasmania.
2. To determine the social acceptability of development by assessing stakeholders’ attitudes to a range of plausible single–area and multiple–area development scenarios in areas recognised for the presence of MNES.
3. To assess the likely economic impacts of differing development scenarios on visitation and where possible on expenditure, in areas recognised for the presence of MNES in Tasmania.
4. To produce a series of recommendations for acceptable tourism development scenarios that can inform local and regional planning frameworks in Tasmania.

In order to meet these objectives, a research design strategy was employed to ensure synergies between the objectives and reporting (Table 1), then three case study regions were selected.

**Table 1  Alignment of Study Objectives with the Research Design and Reporting**

<table>
<thead>
<tr>
<th>Report Section</th>
<th>Study Objectives</th>
</tr>
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<tbody>
<tr>
<td>Chapter 1</td>
<td>Background</td>
</tr>
<tr>
<td>Chapter 2</td>
<td>Literature Review and Methods</td>
</tr>
<tr>
<td>Chapter 3</td>
<td>Objective 1 &amp; 2</td>
</tr>
<tr>
<td>Chapter 4</td>
<td>Objective 1 &amp; 2</td>
</tr>
<tr>
<td>Chapter 5</td>
<td>Objective 1 &amp; 2</td>
</tr>
<tr>
<td>Chapter 6</td>
<td>Objective 3 &amp; 4</td>
</tr>
<tr>
<td>Chapter 7</td>
<td>Objective 4</td>
</tr>
</tbody>
</table>
1.3 Case study regions

Bay of Fires

The Bay of Fires region is located Tasmania’s North East Coast and is well known for its while silicone beaches and orange, lichen stained quartzite rocks. In 2009, the aesthetic beauty of the area resulted in it being voted the ‘World’s Hottest Travel’ destination. Consequently, the region experienced rapid growth in visitation, for several years after the ranking. The Bay of Fires has one major town within it (St Helens), along with several smaller townships (including Binalong Bay and Ansons Bay). It is estimated that approximately 202,522 domestic or overseas visitors came to the region in 2013; 18.3% more than 2012.

The Tarkine

The Tarkine is a beautiful remote part of Tasmania’s West Coast that supports Australia’s largest tract of cool temperate rainforest. Landscapes within the Tarkine range from wild windswept beaches through to extensive button grass plains with stunning vistas to impressive rainforests. It is a region that has become well known in the last ten years for its emergent tourism opportunities. More notoriously, it has become known for the many environmental battles that have been fought, regarding the development of road for tourism, and debates over forestry and mining that have occurred in the northern part of the region for many decades. Several towns are located within the region. Estimates are that approximately 180,931 domestic or overseas visitors came to the West Coast Region in 2013, of which the Tarkine forms apart; 12.6% more than 2012.

Bathurst Harbour

Bathurst Harbour is located in the South West Wilderness of Tasmania in the Tasmanian Wilderness World Heritage Area (TWWHA). The harbour is an expansive almost landlocked body of water that provides safe anchorage from the Roaring Forties that buffet the Western and South Coast Tasmania. The region is accessible only by boaters and bushwalkers who must hike 5–7 days to reach it, or those travelling by sea or airplane. Apart from rangers and volunteers, region has no local community, although it was home to several families who mined in Melaleuca throughout the latter part of the twentieth century. Tourist numbers to the region remain steady and very low at around 8000 visitors per annum (Parks and Wildlife 2013, pers comm. November).
1.4 The presence of Matters of National Environmental Significance

The Australian Government’s central piece of environmental legislation is the Environment Protection and Biodiversity Conservation Act 1999 (EPBC). The EPBC Act defines the interests of the Australian Government on the protection of matters of national environmental significance (MNES). The states and territories have responsibility for matters of state and local significance. There are nine MNES protected under the EPBC Act: world heritage properties; national heritage places; wetlands of international importance; listed threatened species and ecological communities; migratory species; Commonwealth marine areas; the Great Barrier Reef Marine Park; nuclear action including uranium mines; and a water resource, in relation to coal seam gas development and large coal mining development (Department of the Environment 2014d).

With respect to the current tourism study, there are three MNES that relevant. The first MNES is that which is listed for world heritage properties and in particular the Tasmanian Wilderness World Heritage Area (TWWHA) that covers the Bathurst Harbour case study. The TWWHA was first inscribed on the World Heritage List in 1982 and extended in 1989, June 2010, June 2012 and June 2013. The TWWHA meets seven criteria for Outstanding Universal Value (OUV):

1. outstanding examples representing significant ongoing geological processes, biological evolution and human interaction with the natural environment;
2. outstanding examples representing the major stages of the earth’s evolutionary history;
3. contains superlative natural phenomena, formations or features, for instance outstanding examples of the most important ecosystems, areas of exceptional beauty or exceptional combinations of natural and cultural elements;
4. contain the most important and significant habitats where threatened species of plants and animals of outstanding universal value from the point of view of science and conservation still survive;
5. bear a unique or at least exceptional testimony to a civilisation which has disappeared;
6. an outstanding example of a traditional human settlement which is representative of a culture which has become vulnerable under the impact of irreversible change; and
7. directly or tangibly associated with events or with ideas or beliefs of outstanding universal significance.

The second MNES of relevance is that listed for national heritage places. There are two national heritage places that are important to this study. The Australian Heritage Database lists the ‘Tasmanian Wilderness’ (Place ID 105695) on the National Heritage List (Department of the Environment 2014c) (Figure 1 on page 26). The summary statement of significance restates the World Heritage OUVs listed above. It is classed as a ‘natural’ site and was listed on 21 May 2007. This listing covers the Bathurst Harbour case study.

A further national heritage place is the ‘Western Tasmania Aboriginal Cultural Landscape’ (Place ID 105751) that covers approximately 21,000 ha. It is classed as an ‘indigenous’ site and was listed on 8 February 2013. The summary statement of significance describes the sites as ‘the best evidence of an Aboriginal economic adaptation that included the development of a semi-sedentary way of life with people moving seasonally up and down the north west coast of Tasmania’ (Department of the Environment 2014a). The listing also mentions hut depressions found in Aboriginal shell middens. This listing covers in part the Tarkine case study.

The third relevant MNES is that of listed threatened species and ecological communities under the EPBC Act. The Bay of Fires region lists a number of nationally vulnerable and endangered species. For instance, the following fauna are listed as vulnerable under the EPBC Act: southern elephant seal (Mirounga leonina); humpback whale (Megaptera novaeangliae); spotted–tailed quoll (Dasyurus maculatus); fairy tern (Sterna nereis); grey–headed flying fox (Pteropus poliocephalus); and the new Holland mouse (Pseudomys novaehollandiae). The southern right whale (Eubalaena australis) and the swift parrot (Lathamus discolor) are listed are endangered (Department of the Environment 2014a). The sand grassstree (Xanthorrhoea arenaria) and the Tasmanian smokebush (Conospermum hookeri) are listed as vulnerable under the EPBC Act and the Davies’ waxflower, St Helens waxflower (Phebalium daviesii) is listed as critically endangered (Department of the Environment 2014b).

1.5 Relationship of this study to the situation in Tasmania

The timing of this study (June 2013–June 2014) coincided with two major tourism initiatives in Tasmania:
1. The Reimagining the Tasmanian Wilderness World Heritage Area (TWWHA) Project. This is commissioned by the Tourism Industry Council of Tasmania and the Cradle Coast Authority, in conjunction with the Tasmania Parks and Wildlife Service and Tourism Tasmania. This project is due to end in the middle of 2014 and its goals were to ‘create a new vision for the
type of sustainable, low–impact and innovative tourism activity that could be established within or in conjunction with the TWWHA to attract whole new generations of visitors.’ Its focus on the TWWHA meant that the two projects had Bathurst Harbour in common, given its location within the TWWHA.

2. Review of the Tasmanian Wilderness World Heritage Area. This review is being conducted by the Tasmanian Department of Primary Industries, Parks, Water and the Environment, and given its assessment of tourism development opportunities in Bathurst Harbour, close relationships were kept with its directors.

In order to ensure that duplication did not occur with these initiatives, the research team kept in close contact with the managers to share results.

1.6 Sustainable tourism development

The concept of sustainable tourism evolved from its predecessor, sustainable development. In recent years, sustainable tourism has been promoted in policy documents, strategic plans and the academic literature related to tourism (Bramwell & Lane 1993; Muller 1994; Hunter 1997). There have been numerous attempts to define the term (Butler 1993; Cater 1995; Hunter 1997) and despite some differences, it is generally accepted that sustainable tourism involves the meeting of subjective needs (Hardy & Beeton 2003). More comprehensive definitions have been offered by Muller (1994: 132) who suggested that the objective of sustainable tourism is to influence the following factors:

- economic health;
- subjective wellbeing of the locals;
- unspoilt nature, protection of resources;
- healthy culture; and
- optimum satisfaction of guest requirements.

From a policy perspective, sustainable tourism is relevant to planning and management because it can aid in formulating a holistic goals that are relevant to different groups of stakeholders (Liu et al. 1987; Ap 1992; Hardy & Beeton 2001). Arguably, without a full understanding of how tourism is perceived by those stakeholders who live in, manage and use tourism regions, there is a risk that sustainable tourism will not occur (Hardy & Beeton 2001).
What is Sustainable Tourism?

The term ‘sustainable tourism’ is used regularly, but often in very different contexts.

To some it is about economic health, to others it is about tourism that protects the environment. It is also used in terms of tourism that is socially sustainable.

This study defines the term holistically, as tourism that addresses four aspects:

1. It is tourism that provides an optimal visitor experience;
2. Tourism that is economically sustainable;
3. Tourism that it environmentally sustainable; and
4. Tourism that is socio-culturally sustainable.

1.7 Stakeholder analysis

The application of stakeholder theory has been applied with a broad meaning, so it has not only been applied as an ethical business management tool (see Robson & Robson 1996) but also as a planning and management tool (see Sautter & Leisen 1999; Yuksel, Bramwell & Yuksel 1999; Ritchie 1993). As was illustrated earlier, sustainable tourism is based on several assumptions including the notion that subjective needs should be met. Therefore, stakeholder analysis seems a logical method for identifying the multiple subjective opinions of those with a stake in tourism; and for planning it in a way to avoid any costs and to identify conflicts associated with tourism development and management (Yuksel et al. 1999). Surprisingly though, few studies exist where multiple stakeholder groups’ perceptions of sustainable tourism have been explored (Hardy, Beeton & Pearson 2003). This research need provided the impetus for our research approach.

1.8 Economic impacts of tourism

Government and business organisations are increasingly interested in the economic impacts of tourism. In Tasmania, tourism is identified as a significant contributor to the state’s economy accounting for 4.1% of the state’s Gross Value Added through business income, employment infrastructure, investment by private and government bodies and community engagement. The latest figures reveal that tourism accounts for 6.8% of the state’s jobs, that is, 16,000 jobs (in 2011–12) and contributes a total tourist expenditure of $1.5 billion into the state’s economy for 2012–13. Most of the tourism impact (84%) is from domestic tourism (that is, tourists from elsewhere in Australia) rather than overseas (Pham et al. 2013). The industry has been identified as a state strategic priority for development and investment (Deloitte Access Economics, 2013) area for growth and support (Tasmanian Government, Tourism Tasmania, Tourism Industry Council
Tasmania 2013). However, there has always been a clear mandate in developing tourism in Tasmania so that it contributes to the state’s economy in the form of tangible outputs. As such, this report will make the link between sustainable tourism development scenarios and potential impacts on the state’s economy using available secondary data augmented to our development scenarios.

1.9 Report outline

This report outlines the approaches taken to explore tourism stakeholders’ understanding of and attitudes towards sustainable tourism development in sensitive areas recognised for the presence of Matters of National Environmental Significance (MNES) in Tasmania.

Chapter 2 outlines the research, including a description of the first phase, where Tasmanian stakeholders were invited to take part in an interview that involved a pictorial Q sort. We describe the interview process, location of interviews, and the qualitative and quantitative techniques used to analyse the Q sort data. The research methods used in the second phase of the research are outlined, including how we tested tourism scenarios that were derived from the first phase of research with tourists in the case study regions.

How is the economic impact of tourism measured?

The study uses the recent work produced by Tourism Tasmania, Tourism Industry Council Tasmania and Tourism Research Australia. They estimate the economic impact of tourism in two important ways.

The outputs of tourism. There are two main outputs; tourism consumption as represented by the amount of good and services that tourists purchase (represented at basic prices as Gross Value Added and including taxes as Gross State Product) and employment.

The direct and indirect impacts of outputs. Tourism outputs are measured as both direct outputs, that is, where the tourist has direct physical contact with the product (for example, accommodation) and indirect outputs where the tourist uses them, but doesn’t directly purchase them (for example, petrol, that is not produced at a retail petrol stations).

In Chapter 3, we describe the results of the first case study region, the Tarkine. We outline the environmental qualities and socio–political issues related to the region and the Attitude Clusters that emerged from the Phase 1 interviews of Tasmanian stakeholders. We present the results of the second phase of the research, where tourism scenarios were tested on domestic tourists to the Tarkine. The chapter concludes with a discussion of the emerging issues from our data analysis.
Chapter 4 describes the results from the Bay of Fires case study region, following the same structure as Chapter 3: outlining the environmental qualities and socio-political and presenting the Attitude Clusters that emerged from the Phase 1 interviews of Tasmanian stakeholders. We present the results of the second phase of research, where tourism scenarios were tested on domestic tourists to the Bay of Fires. We conclude with a discussion of the emerging issues from our data analysis.

Chapter 5 describes the results from the Bathurst Harbour case study region, following the same structure as Chapters 3 and 4.

In Chapter 6, we present the results of the third phase of the research, where economic implications for Tasmania were derived from the data, using economic analysis. We address the issues of stakeholders’ attitudes towards the cumulative impacts of tourism development across the entire state of Tasmania. The chapter presents a whole-state assessment of possible tourism scenarios that exist and concludes with a discussion of the economic implications for state of Tasmania.

Cheater 7 concludes the research with recommendations for sustainable tourism planning. We discuss the implications for planning, specifically given the presence of MNES in the regions, the implications for the case study regions and finally the implications for the entire tourism industry. We offer a discussion of knowledge gaps and future research implications.
CHAPTER 2
The Research Process

In Chapter 7, we outline the three phases of research that were undertaken by the team. We begin by outlining the decision behind the selection of the case study areas. Particular attention was given to choosing regions that differed in terms of their tourism development, tenure characteristics and the presence of MNES in them. The chapter then outlines the process of identifying the stakeholder groups and the choice to use multiple methods and an iterative, inductive research approach. This facilitated an understanding of the breadth of attitudes held by stakeholders and also allowed for the research to respond to the emergent issues within each case study region.

Following this, the three phases of research are described: the first allowed the research team to gauge the attitudes of Tasmania stakeholders using the innovative Q method technique; the second allowed us to test their sustainable tourism preferences on tourists visiting the case study region; and the third involved economic forecasting of the impacts of the tourism scenarios on Tasmania’s economy.

We detail how we used the Q method technique and in particular, how it relates to the sustainable tourism spectrum that we formed as the basis for the selection of photographs. It also addresses the decision to use both quantitative and qualitative techniques to analyse the data.

2.1 Selection of the case study areas

Following the project inception, there was discussion regarding the selection of case study regions and whether these should be selected according to their ecology, presence of MNES’, tourism development or land tenure. The research team consulted with the Commonwealth Department of Environment, members of the Landscape and Policy Hub within the NERP, Tourism Tasmania, the Tourism Industry Council and the Tasmania Parks and Wildlife Service. As a result, we decided to select three tourism regions with differing levels of tourism development. Levels of tourism development have been defined in Butler’s (1980) widely used Tourism Destination Life Cycle Model. His work identified six stages in tourism development and suggested that after the third stage, the environmental, social and economic carrying capacities of regions are passed, risking deterioration of the tourism product:

Stage 1 Exploration: a very small number of visitors dispersed through region and stay extended periods of time. There is an almost non-existent tourism industry attracting adventurous tourists who are attracted to natural and cultural attractions;

Stage 2 Involvement: Visitor intake increases slowly and local entrepreneurs begin to provide small-scale specialised services;

Stage 3 Development: Visitor growth increases rapidly and landscape changes in a short period of time. The scale of tourism development increases and local involvement decreases.
Stage 4  **Consolidation:** A decline in growth rate of arrivals and although total numbers of tourists still increases. Visitor numbers exceed local population.

Stage 5  **Stagnation/Saturation:** When peak visitor numbers and facilities reach capacity and region is seen as out of ‘fashion’ and less than desirable. Visitor numbers stagnate.

Stage 6  **Decline or rejuvenation:** Tourist numbers decline, or area rejuvenates itself following a period of decreasing visitor numbers.

The regions we selected for our case studies represented a spectrum of stages, as per the Butler (1980) model. These were:

- Bathurst Harbour (Stage 1 — Exploration)
- Tarkine (Stage 2 — Involvement)
- The Bay of Fires (Stage 3 — Development)

In addition to their relevance to the Butler’s stages of tourism development, each of the regions, as discussed in Chapter 1, also contain different areas subject to MNES (see Table 1) as well as different land tenures. Bathurst Harbour is largely within the TWWHA, has low tourism numbers and has two MNES. The Tarkine has moderate tourism numbers, mixed tenure and has one MNES within the region. And finally, the Bay of Fires had the highest tourism numbers, one MNES within the region and is a mixture of Crown land and National Park.

**Table 2  Tourism characteristics, relevant MNES areas and tenure of the three case study regions**

<table>
<thead>
<tr>
<th>Tourism Development Stage (using Butler’s model)</th>
<th>Number of Tourists</th>
<th>Presence of MNES in Region</th>
<th>Tenure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bathurst Harbour  Exploration</td>
<td>Very low numbers and little growth</td>
<td>National Heritage places; World Heritage Properties</td>
<td>Largely within the TWWHA</td>
</tr>
<tr>
<td>Tarkine  Involvement</td>
<td>Low–moderate numbers with steady growth</td>
<td>National Heritage places;</td>
<td>National Park Crown land Privately owned land</td>
</tr>
<tr>
<td>Bay of Fires  Development</td>
<td>Rapid growth ten years ago and now steady growth</td>
<td>Listed threatened species</td>
<td>National Park Crown land Privately owned land</td>
</tr>
</tbody>
</table>
2.2 Identifying stakeholder groups

It has been argued that stakeholder concerns, goals and values must be included in strategic planning and are integral to managing destinations in a successful manner (Bornhorst, Ritchie & Sheehn 2010; Robson & Robson 1996). In a tourism context, this includes stakeholders such as tourists, residents, business owners and local government officials (Goeldner & Ritchie 2002; Hardy & Beeton 2001). Both Byrd (2007) and Hardy and Beeton (2001) have argued that stakeholder involvement must begin with recognition of stakeholders and make allowance for them to make informed and conscious decisions about the development of tourism at specific destinations.

In practice, Byrd (2007) argues that two areas of thinking have emerged regarding the selection of stakeholders. The first approach has synergies with the classical idea of stakeholder management, is advocated by Clarkson (1995) and involves ‘prioritising’ stakeholders according to their power, as being either primary or secondary. Policy is then made based on those in power. The risk with this approach is that labelling and prioritising of stakeholders requires subjective decisions to be made over their ‘importance’, that in turn risks oversights being made and neglected or disparate stakeholders groups being ignored (Hardy, Wickham & Gretzel 2013).

The second approach argues that rather than considering power, consideration should be given to all tourism stakeholder groups, without one being assigned priority over the other. While time consuming and expensive, this approach can reduce the potential for conflicts, and is regarded as more politically legitimate (Yuksel, Bramwell & Yuksel 1999). It has also been advocated as an approach that has close ties with sustainable tourism planning (Hardy & Beeton 2001). Given our desire to understand the breadth of attitudes that exist regarding sustained tourism development, we adopted the first approach of involving all stakeholders in this study, regardless of the positions of power.

Once the decision had been made to conduct three case studies in the Tarkine, Bathurst Harbour and Tarkine, the research team conducted background research with key informants to develop and group stakeholders. In addition to tourists, we identified and defined the following stakeholder groups:

- **Tourism Operators** — (henceforth referred to as Operators) defined as managers or owners of tourism business that operated in the case study regions.
- **Members of Community Groups** — individuals who were members of community groups such as environmental groups, members of sporting clubs or special interest groups.
- **Locals** — individuals who live in, or own property in the case study area or own property in the region.
- **Regulators** — individuals who manage, run or act in position that influence policy, management or marketing of tourism in the case study region.
2.3 Selection of multiple methods

Following the selection of our case study areas and stakeholders for this study, we sought an appropriate method for our study. Our preference was to conduct research using mixed methods. We sought to elicit the attitudes and presences of stakeholders through largely qualitative methods, open ended questioning in face–to–face interview. This allowed our respondents to build a rapport for the interviewer and become comfortable in expressing their opinions (Patton 2002).

In addition, we required an approach that would allow us to identify and understand the preferences of entire attitude clusters of stakeholders. Moreover, we also sought to attain data that would be statistically representative of our case study regions. Thus, a quantitative approach to the analysis of attitudes was also necessary.

Patton has defined the use of multiple methods as a paradigm of choice and situational responsiveness, whereby different methods are appropriate for different situations (1990: 390). This study employed what Miller and Crabtree (1994) defined as sequential design, where one study or phase informs the other. Consequently, we designed an iterative, three-phased approach (Figure 1), whereby each phase built on the former.

Phase 1 — the objective of Phase 1 was to develop a sense of the breadth of stakeholders’ opinions within the case study areas and to collect data that would provide a reliable representation of the clusters of opinions that may occur about tourism development.

As a result, a face–to–face interview instrument was designed to capture the breadth of stakeholders’ attitudes, but at the same time provide the opportunity to quantify their attitude clusters. This involved a selection of open–ended questions that allowed respondents to express their opinions. This was particularly important, as research that sought to decipher the attitudes of different sectors of the population towards tourism, had not been conducted in the region before. These open–ended questions were designed with qualitative textual analysis in mind. In addition, the interviews were designed to allow for with quantitative analysis. This was because we wanted to develop a sense of the statistically significant attitude clusters that may occur within and across stakeholders groups, in the case study regions. Therefore, questions within the survey used closed–questions and we use the Q method process for analysis, discussed below.

Phase 2 — the objective of this phase was to decipher tourists’ preferences for differing styles of tourism development, based on the attitude clusters that emerged from the interviews in the first phase. Self–completed surveys were used in this phase, as our objective was to measure and analyse their responses in a statistical sense, and to minimise the intrusiveness of the research tool.
Phase 3 the objective of this phase was to forecast the probable economic impacts of the attitude clusters for tourism development (as identified in earlier phases). Economic impact analysis is primarily concerned with identifying what contribution tourism activity makes to the state economy. By using the work already undertaken by Tourism Tasmania and Tourism Research Australia, we extrapolated marginal changes in visitation numbers based on our tourist survey to determine how this would affect the flows of direct and indirect tourism outputs on the state economy. While this work is usually undertaken using visitor spending surveys, due to the study priorities, this research is based on secondary data, already collected and available through various sources (see Pham et al. 2013, Tasmanian Government, Tourism Tasmania, Tourism Industry Council Tasmania 2013, Tourism Tasmania 2013b).
**Figure 1: The Research Process**

### The Research Process

#### Data Collection

- **Case-study selection**
  - Federal Government priority (MNEs)
  - State development priorities
  - Sustainable Tourism Development Literature
  - Project steering committee
  - Interviews with locals
  - Questionnaires of Tourists
- **Stakeholder Selection**
  - Locals by case study area
  - Tourist industry
  - Regulators
  - Community members
  - Tourism operators
  - Social Attitude Clusters by Case study
- **Social Attitude Clusters**
  - Q Sort methodology
  - Qualitative thematic analysis
  - Barriers & opportunities for development
- **Tourism Impacts**
  - Quantitative Analysis
  - Tourists social attitudes to development
  - Economic Impact of social attitudes to Tasmania

#### Analysis

- **Tarkine**
- **Bathurst Harbour**
- **Bay of Fires**
- **Scenarios of Tasmania’s Future Tourism Development**
2.4 Phase 1: Face-to-face interviews and the use of photography and visual methods in research

Our task in Phase 1 was to ascertain stakeholders’ attitudes towards tourism development in our three case study regions. In addition to interview questions that ascertained stakeholders’ relationship to the region and the tourism industry, and their attitudes towards the number of visitors, we required a technique that would effectively elicit their attitudes towards different styles of tourism development, and ultimately their preferences. Often the process of understanding the conditions that stakeholders consider acceptable involves the provision of ‘a narrative/numerical description of a range of recreation-related impacts’ that respondents have to rate (Manning & Freimund 2004: 559). This method has mostly been used to explore the issue of crowding, and ecological impacts (Manning & Freimund 2004). More recently, partly because of improved technology, visual images of sites have replaced the narrative statements (Inglis, Johnson & Ponte 1999; Manning & Freimund 2004). Indeed, it has been argued that visual depictions such as photographs increase response validity. For example, when visual images depict the number of encounters with other visitors, the respondent is likely to report acceptance of higher numbers than when they are responding to narrative descriptions of encounter type, and the responses more closely align to observed responses (Manning & Freimund 2004).

In addition to acting as effective ‘surrogates’ for reality (Jacobsen 2007), visual methods such as photographs also have the following advantages:

- They standardise the ‘question’ in that each visitor sees exactly the same picture, compared to narratives where the respondent might need to ‘fill in the gaps’ or make assumptions;
- They allow a very clear focus on select variables keeping other factors constant for example, varying the number of people, while everything else remains constant;
- They may depict a situation more clearly than a narrative description; particularly useful where it is hard to describe a condition accurately and simply;
- They are economically viable research technique (Jacobsen 2007);
- They can be edited to depict situations that do not currently exist (for example, a possible future scenario) (Manning & Freimund 2004).

Some areas of concern in using visual images have included whether the quality and/or type of image affects research outcome; and whether there is a starting point bias effect. However, neither of these seems to occur (Manning et al. 2002; Manning & Freimund 2004). However, the distribution of people in the foreground and background of images does influence response and therefore it has been suggested there is a need to distribute people in the image evenly (Manning & Freimund 2004). There is also a need to ensure that aspects such as weather remains constant through all photographs—thus the need for standardised background light conditions (Jacobsen 2007).
2.5 Use of the Q method

The use of Q method in landscape research has existed for several decades. It requires participants to sort different items against a distribution patterns and then involves analysis that identifies common patterns related to how the items have been sorted (Fairweather & Swaffield 2001; Brown 1980). Commonly, Q sorts are conducted using photographs rather than verbal statements, given their ability to be so readily accepted as landscape ‘surrogates’.

Q sort data may be analysed in a number of ways: from either a qualitative or quantitative perspective. We chose to do both, so respondents’ sorting of photographs was recorded using statistical methods (described below), and the comments that they made while sorting where also recorded to understand their rationale for the types of tourism development they wanted.

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**The What and the Why:**
using a multiple method approach

This study used both quantitate and qualitative techniques to analyse the data collected in our Phase 1 interviews of Tasmanian stakeholders.

The **quantitative analysis allowed us to answer the ‘what ‘ questions:** what do different stakeholders want in terms of tourism development in their region? We did this by conducting cluster analysis that identified different ‘clusters’ of attitudes in each of the case study regions.

The **qualitative analysis allowed us to answer the ‘why’ questions:** why do different stakeholders hold this opinion and how is this related to their views on the case study regions? We did this by transcribing each of the interviews and conducting thematic analysis on their responses.

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2.6 The selection of photographs for the Q sort

2.6.1 Ecotourism and sustainable tourism spectrums

Our assessment of stakeholders’ attitudes to sustainable tourism development was achieved by asking stakeholders to order images of different aspects and levels of tourism development from their most preferred to their least preferred. This approach required a way of categorising and making sense of the various tourist opportunities and levels of development that might be possible in the natural areas of Tasmania. Our challenge was to find an array of images that would adequately reflect the spectrum of tourism development in natural areas in Tasmania; to guide us in the endeavour we turned to the outdoor recreation, protected area and ecotourism management literature.
We have predominantly used Boyd and Butler’s (1996) Ecotourism Spectrum (ECOS), that is derived from Clark and Stankey’s (1979) visitor experience framework, otherwise known as the Recreation Opportunity Spectrum (ROS), and Butler and Waldbrook’s (2003) Tourism Opportunity Spectrum (TOS) for adventure travel (Butler & Waldbrook 2003 — originally published in 1991). We have used the Ecotourism Spectrum because the framework focuses on ‘a form of tourism that fosters environmental principles, with an emphasis on visiting and observing natural areas’, and implicit in this type of tourism, ‘are the concepts of sustainability and appropriateness to ensure the maintenance of the resource base of the destination area, that may also provide the livelihood for local inhabitants of the area’ (Boyd & Butler 1996: 558). This framework was suitable for the style of tourism that already exists in Tasmania and also suitable for future sustainable tourism options. Moreover, it was suitable for our first objective to develop a thorough understanding of stakeholders’ attitudes towards sustainable tourism development.

The Ecotourism Spectrum outlines the range of experiences, supporting infrastructure and management controls that characterise ecotourism. A detailed discussion is in Appendix A. In simple terms, the Ecotourism Spectrum presents a spectrum of ecotourism experiences ranging from the nature focused and independent travel of the eco-specialist to the eco-generalist who participates in ecotourism group tours, and is more reliant on local infrastructure and services. The factors used to describe Boyd and Butler’s (1996) Ecotourism Spectrum include:

1. Access to site
   a. Level of difficulty accessing the site
   b. Access system: transportation to the site; marketplace and information channels
   c. Means of conveyance at the site
2. Compatibility with other uses/activities at the site
3. Attractions offered – focus of activity
4. Existing tourism infrastructure
   a. Extent or level of development
   b. Visibility
   c. Complexity
   d. Facilities
5. Social interaction
   a. With other ecotourists
   b. Between local populations and ecotourists
6. Level of skill and knowledge
7. Acceptability of visitor impacts
   a. Degree of impact
   b. Prevalence of impact
8. Acceptability of control
The Ecotourism Spectrum was particularly useful to this research given its focus on eco and nature-based tourism that forms a core part of the Tasmania tourism experience. However, given that not all tourism product in Tasmania fits within that category, there was a need to adjust the spectrum (Table 3). The focus of this research was on stakeholders’ attitudes towards sustainable tourism development in their regions. The scope of sustainable tourism is regarded as being broader than ecotourism, as it is a practice that may be applied to any style of tourism business, regardless of whether it is located in natural areas (Weaver 2006). To reflect this, we adjusted the names of the tourists to ‘Eco–specialists’, ‘Facilitated Nature Users’ and ‘Generalists’.

A further reason for modifying the Ecotourism Spectrum was that requirements for education that exist within ecotourism definitions (Ceballos–Lascurain 1993) are not components of traditional sustainable tourism definitions. Consequently, the Ecotourism Spectrum component of ‘Level of skill and knowledge' was removed from our modified spectrum.

Given our desire to broaden our spectrum beyond ecotourism, we also adjusted the defining factor of access by dividing it into two aspects: difficulty of access (in terms of expense and/or ease of access); and the type of transport needed to get to the case study regions.

Finally, given the increasing levels of understanding and focus on climate change, and our research focus on assessing both the impacts and experiences that make up sustainable tourism products, we decided to include a new defined factor, called Visitor Experiences. This aspect addressed impacts, the use of energy and group activity.

Consequently, the spectrum addressed four defining factors:

1. Access
2. Accommodation
3. Impacts and Management
4. Visitor Experiences

It should be noted that this spectrum focused entirely on sustainable forms of tourism development. As it was focused on the different development options and experiences that are sought by tourists, it did not address aspects of sustainable tourism such as the impacts of tourism on the host community and socio–cultural impacts.
### Table 3  Sustainable nature–based tourism development spectrum

<table>
<thead>
<tr>
<th>Defining Factors</th>
<th>Type of Sustainable Tourist</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Eco–specialists</td>
</tr>
</tbody>
</table>

#### 1. Access
- **Difficulty of Access**
  - Eco–specialists: Challenging and/or expensive
  - Facilitated nature–users: Vigorous and/or economical
  - Generalists: Easy and/or economical

- **Type of Transport**
  - Eco–specialists: Trails & specialist aircraft
  - Facilitated nature–users: Vehicles for Gravel and Paved roads
  - Generalists: Large capacity transport

#### 2. Accommodation
- **Size of Accommodation**
  - Eco–specialists: No development, or facilities, little is visible
  - Facilitated nature–users: Isolated areas, natural aesthetics, rustic
  - Generalists: Moderate to resort style development

- **Infrastructure & Facilities**
  - Eco–specialists: None
  - Facilitated nature–users: Moderate facilities
  - Generalists: Many comforts

- **Level of Control & Management**
  - Eco–specialists: No control
  - Facilitated nature–users: Minimum control
  - Generalists: Moderate to strict control

- **Crowding**
  - Eco–specialists: Avoid or little contact
  - Facilitated nature–users: Some contact, travel in small groups
  - Generalists: Frequent contact, large groups

- **Impacts**
  - Eco–specialists: Low
  - Facilitated nature–users: Moderate
  - Generalists: Consumptive

#### 3. Impacts & Management
- **Use of energy**
  - Eco–specialists: Low human carbon
  - Facilitated nature–users: Moderate energy
  - Generalists: Fossil fuels

- **Group activity**
  - Eco–specialists: Educative/Appreciative
  - Facilitated nature–users: Facilitated nature activity
  - Generalists: Activity & Comfort
Following the development of our revised Sustainable Nature–based Tourism Development Spectrum, we selected activities, transport, accommodation and infrastructure that would be acceptable according to the different types of tourists.

2.6.2 Selection of photographs against the spectrum

Once the Sustainable Nature–based Tourism Development Spectrum was developed, the research team set about choosing photographs that would represent the factors and elicit the attitudes of stakeholders concerning tourism in the case study region.

In most cases, it was deemed appropriate to select a photograph for each of the descriptors. The exception to this was the descriptor called ‘Large bodied transport’. Given that none of our case study regions had an airport within in them, nor a train station, the research team deemed that a photograph of this style of transport would be inappropriate for the regions. Conversely, given the undeveloped nature of tourism in two of the case study region (Tarkine and Bathurst Harbour) we deemed it appropriate to have three photographs for each of the accommodation descriptors. This would allow stakeholders in the case study regions to be very specific about the style of accommodation they preferred. Thus, photographs were chosen to represent the spectrum of accommodation options for each of the descriptors. For example, within the eco–specialists descriptors, we chose a photograph of a lone tent in the wilderness; a tent that was set on a hardened campsites; and a ‘glamping’ style tent that was clearly semi–permanent (see Table 4).

A full list of the photographs and the random numbers that were assigned to them in order to record participants sorting, is available in Appendix D. Our photos were selected from a variety of sources including shutterstock, our own private photograph collection and photos from the Tourism Tasmania photographic library. Copyright permission was gained for all the photographs we used in this research.
## Table 4: Selection of photographs against the sustainable nature-based tourism development spectrum

<table>
<thead>
<tr>
<th>Type of Sustainable Tourist</th>
<th>Eco–specialist</th>
<th>Facilitated nature–users</th>
<th>Generalists</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Defining Factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1. Access</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Difficulty of Access</td>
<td>Gravel road</td>
<td>Outback road with gravel edges</td>
<td>Road with green edges</td>
</tr>
<tr>
<td><strong>2. Accommodation</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size of Accommodation</td>
<td>Lone tent hardened campsite Glamping</td>
<td>Bush cabin Caravans Many cabins</td>
<td>Eco looking lodge Extensive resort &amp; pool Several resorts</td>
</tr>
<tr>
<td><strong>3. Impacts &amp; Management</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrastructure &amp; Facilities</td>
<td>Lone shed in National Park</td>
<td>Heritage Building</td>
<td>Several shops</td>
</tr>
<tr>
<td>Level of Control &amp; Management</td>
<td>Undeveloped track</td>
<td>Hardened track no edges</td>
<td>Hardened track with handrails</td>
</tr>
<tr>
<td>Crowding</td>
<td>No interparty contacts</td>
<td>Occasional interparty contacts</td>
<td>Frequent interparty contacts</td>
</tr>
<tr>
<td><strong>4. Visitor Experiences</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impacts</td>
<td>Indigenous canoe</td>
<td>Horse–riding</td>
<td>Fishing</td>
</tr>
<tr>
<td>Use of energy</td>
<td>Kayak</td>
<td>Mountain biking</td>
<td>Motorbike lone</td>
</tr>
<tr>
<td>Group activity</td>
<td>Guided bushwalk</td>
<td>Group horse rider</td>
<td>Group quad bikes</td>
</tr>
</tbody>
</table>
The Q sort interview we conducted involved one–on–one structured interview that were audio recorded with notes taken at a time and place of the interviewee’s convenience. All interviews were conducted by experienced interviewers between November 2013 and March 2014. A copy of the interview schedule is in Appendix B.

Interviews were structured primarily around the elicitation of the Q sort data. Each participant was asked to:

- look at the 32 pictures and focus on style of tourism development, not layout of photos, photo shopping et cetera;
- organise the pictures into three piles: like, dislike and neutral;
- place their favoured image in the far right hand column and then to place the next best two images in the next column and continue with their ‘like’ pile until all images were allocated. Then start on the dislike pile until all pictures were allocated to a column;
- during sorting, the interviewers reminded participants to think about style of tourism development they wanted in the case study region and ask for their explanation about why each picture went in specific columns.

Interviewee characteristics and perceptions were also gathered about attitudes towards current tourism numbers/ level of development, future opportunities, links to the industry and the region. the case study region, place attachment and attitudes towards tourism development in the two other case study regions around Tasmania.

We conducted interviews with tourism operators, community groups, regulators and locals, as the key stakeholder for tourism development. Table 5 outlines the number of interviews conducted by stakeholder group for each case study region.

<table>
<thead>
<tr>
<th>Region</th>
<th>Tourism Operators</th>
<th>Community Groups</th>
<th>Regulators</th>
<th>Locals</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bathurst Harbour</td>
<td>7</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>14</td>
</tr>
<tr>
<td>Tarkine</td>
<td>8</td>
<td>4</td>
<td>5</td>
<td>21</td>
<td>38</td>
</tr>
<tr>
<td>Bay of Fires</td>
<td>9</td>
<td>2</td>
<td>5</td>
<td>27</td>
<td>43</td>
</tr>
</tbody>
</table>
2.7 Quantitative analysis of the Q sort data

The Q sort data were analysed using the software program PQMethod, Version 2.33 (Schmolk 2009). In overview, PQMethod generates a correlation matrix between each subject’s Q sort and every other subjects’ Q sort. It then conducts a Principal Components Analysis on the correlation matrix to generate factors or groups of subjects who sorted the items in a similar way. The initial output is a listing of all subjects with a nominal loading, or association with, eight factors. In this first output, most of the subjects are loaded on the first factor. These data are then modified by Varimax rotation in order to find the simplest structure in the data. This process spreads the variance across the factors in order to get more subjects loading on factors other than factor 1. The result is identification, and a count, of significant loaders on each factor. Subsequently, PQMethod uses the data from these loaders to generate further information about each of the factors. Subjects who load strongly on a factor have a proportionately greater influence on the factor’s characteristics. Other outputs include tables that show the factor characteristics in different ways.

Data were entered separately for each of the three study areas.

For each study, an initial analysis was run to determine the final number of factors to be used in subsequent analysis. Following the recommendation of Brown (1980: 222), we included factors that had at least two significant loaders on the unrotated factor matrix. The significance level was derived from the standard error formula of $1/\sqrt{N}$, where $N$ equals the number of items in the Q method. For this study, the derived value for 33 items was 0.17, and at the 0.01 level of confidence this value was multiplied to 2.58 to set the significant level at 0.45. Loadings had to be 0.45 or above to be judged as significant.

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**How to Analyse Q Sort Data**

The Q sorts from several people are correlated and factor analysed to yield groups of people who have ordered the statements in a similar way. The order of statements of all the people who have a similar array is used to produce an array of statements typical of those subjects. This array is referred to as an ‘attitude cluster’ in this study, and the focus of attention is on the cluster and its qualities, so that each cluster and its corresponding array of images is interpreted, by the researchers, for the attitudes and meanings they reveal.
Using this criterion, the number of factors indicated for each of the studies was five for Tarkine, three for Bay of Fires and one for Bathurst Harbour. The finding that Bathurst Harbour had only one factor was due largely to the fact that only 15 subjects were included since this location does not have any locals, unlike the other two locations. To some extent, the number of factors is a product of the number of subjects.

Applying the criterion specified above of using factors with two significant loader on the unrotated factor matrix can be problematic if the number of loaders on a factor is low. Research on the effects of the number of loaders on factor characteristics (Fairweather 2002) shows that for maximum stability in the characteristics of a factor, the number of significant loaders should be near to ten. It is not always possible to achieve this target but it is preferable, especially for studies that seek public preferences to guide policy development and need results to be reasonably unequivocable on the key findings.

Following this analysis, we developed attitude clusters of stakeholders in each region. We named them with descriptors that matched the predominant attitudes of the groups.

2.8 Qualitative analysis of the Q sort data

The qualitative analysis ‘fleshed out’ stakeholders’ reasons for their Q sorts. We transcribed each interview, taking care to note all comments related to each photograph (Table 6). The qualitative analysis then proceeded, with the following steps:

1. Identification of stakeholders within each attitude cluster
2. Analysis of their attitude towards the region;
3. Analysis of their attitude towards tourism in the region
4. Analysis of their comments towards the statistically significant photographs.

| Table 6 Regional clusters and their explanatory power of total variance in each region Q data |

<table>
<thead>
<tr>
<th>Regional Clusters and Explanation of Total Variance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bathurst Harbour</td>
</tr>
<tr>
<td>Cluster 1</td>
</tr>
<tr>
<td>Cluster 2</td>
</tr>
<tr>
<td>Cluster 3</td>
</tr>
</tbody>
</table>
2.9 Phase 2: Testing tourists preferences for different scenarios of tourism development

Phase 2 involved testing the attitude clusters that emerged from our Phase 1 interviews of Tasmania stakeholders, on domestic tourists. We developed a short (less than 10 minutes) self-completed survey to be provided to each tourists in their region that asked four main groups of questions.

1. Basic demographic information including: which state do you live, age bracket
2. Tourism characteristics (based on Tourism Tasmania’s profiling), including: preference for visiting specific attractions (art and culture, fine wine and food, history and cultural, nature sites), length of stay in Tasmania, mode of travel for holiday
3. Preference for development cluster in region; ranking the development clusters, would you visit more often with proposed type of development, number of tourists that should visit the region
4. Preference for development cluster across Tasmania (cumulative); would you support same level of development at other Tasmanian destinations, have you been to the other destinations.

A novel approach to testing these clusters with tourists was the use of photo elicitation, rather than the use of words and descriptors. Three photos were chosen for each cluster to distinguish it from the other clusters in each region (surveys are included in Appendix C).

Overall, 137 tourists were surveyed. Of these, 55 were in the Tarkine (surveyed at Corina Ferry), 65 at Bay of Fires (surveyed at St Helens) and 17 at Bathurst Harbour (were provided by Parks volunteers at Melaleuca). All surveys were conducted in January–March 2014. We assessed only the preferences of domestic tourists to Tasmania, who account for approximately 86% of visitors to the state (Tourism Tasmania 2013a). We also restricted our surveys to tourists who were in the case study region at the time of the data collection. Arguably, tourists in Tasmania may have opinions and values for the case study areas even though they may not visit them. However, our research revealed that many tourists were unaware of where the case study locations were. Therefore, asking tourists who were not familiar with the regions to express their opinions on future tourism development, would have produced unreliable data. For these reasons we restricted our surveys to tourists who knew about the region, that is, were in the region.

For the analysis, data from surveys was inputted into Excel and analysed in the statistical software package called SPSS. Due to the low number of respondents per region all analysis was descriptive in nature (that is, not statistically significant).
2.10  Phase 3: Forecasting the economic impacts of the tourism scenarios

Phase 3 of this work involved the estimation of the economic impact of alternate tourism development scenarios. It combined our data with established secondary data used in Tasmanian planning decisions. Due to the mixed methods and the high dependency on other sources of data, this work was highly contextualised. There were three key steps in estimating the economic impact of the social preference clusters.

First, there was a need to aggregate the clusters to state level to align with current forecasting of tourism numbers and expenditure by the Tasmania Government and Tourism Industry, as found in Tourism 21 Strategy (Tasmanian Government, Tourism Tasmania, Tourism Council Tasmania, 2013). This aggregation was undertaken through a second order Q sort analysis that involved identifying the correlation between the established clusters in each case study area. This secondary analysis is basically, a sort undertaken on the eight clusters that were identified for each. Therefore, for this second order analysis to be worthwhile it needs to explain a significant amount of the variation as found in the eight clusters. The PQMethod was again used and Varimax rotation was used to identify that there were three clear clusters that explained 87% of the variation within our eight clusters. This results are very strong. The relationship between the scenarios and the identified regional clusters is provided below in Table 7.

Table 7  Alignment of scenarios and regional clusters identifies how much of the total variance each scenario explains.

<table>
<thead>
<tr>
<th>Loading regional clusters</th>
<th>% of Variation Explained</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bathurst Harbour</td>
<td>Bay of Fires</td>
</tr>
<tr>
<td>Immersive Engagers</td>
<td>Engagers with Nature</td>
</tr>
<tr>
<td>Immersive Planners</td>
<td></td>
</tr>
<tr>
<td>Outdoor Multi–Users</td>
<td>Outdoor Recreationalists</td>
</tr>
<tr>
<td>Environmental Pragmatists</td>
<td>Environmental Accommodators</td>
</tr>
</tbody>
</table>

Second, these scenarios required clear understanding of what desired tourist development could be attributed to them, how we could expect them to affect the number, type and yield of tourists visiting Tasmania. This was undertaken by interrogating our stakeholder and tourist data to identify if these scenarios identified any significant characteristics. These attributes were then used as the assumptions under which an economic impact assessment was constructed. To undertake this, we first investigated how aligned our tourist data was to the known Tourism statistics in Tasmania. The reason for this is that if we have an obvious represented sample of the whole state Tourism (that
is, their pattern in visitation, age, origin, et cetera) then we can rely on our tourist survey to address more questions. Table 8 provides a comparison between proportions in our tourist survey and those as reported by Tourism Tasmania in the 2013 TVS Tourism Tasmania 2103a). As evidenced by the results our tourist data is a skewed sample of Tasmanian tourists, as such we will only use our survey data for broad based assumptions on change in tourism numbers and rely heavily on secondary data from other sources.

Table 8  Comparison with tourism Tasmania statistics (2013a)

<table>
<thead>
<tr>
<th>Percentage in our Survey Data</th>
<th>Percentage of Tourism Tasmania (TVS 2013) survey data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Victoria</td>
<td>42%</td>
</tr>
<tr>
<td>New South Wales</td>
<td>27%</td>
</tr>
<tr>
<td>Queensland</td>
<td>18%</td>
</tr>
<tr>
<td>South Australia</td>
<td>6%</td>
</tr>
<tr>
<td>Western Australia</td>
<td>7%</td>
</tr>
<tr>
<td>Australian Capital Territory</td>
<td>0%</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>0%</td>
</tr>
<tr>
<td>Australia – no state given</td>
<td>0%</td>
</tr>
<tr>
<td>Average Length of Stay (Nights)</td>
<td>28</td>
</tr>
<tr>
<td>Below 40 years (44 for TVS)</td>
<td>18%</td>
</tr>
<tr>
<td>Over 41 years of age (+45 for TVS)</td>
<td>82%</td>
</tr>
<tr>
<td>In a rented, borrowed or your own vehicle</td>
<td>81%</td>
</tr>
<tr>
<td>As part of an organised tour</td>
<td>1%</td>
</tr>
<tr>
<td>As a cruise ship passenger</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>18%</td>
</tr>
</tbody>
</table>
The third and final step in undertaking the economic impact assessment is to marry the scenarios (and associated assumptions) with the projected data from secondary sources to estimate change in tourist expenditure in Tasmania associated with our alternate development scenarios. Key pieces of secondary data and how they are used are listed below.

1. **Economic multiplier effects from tourism expenditure in Tasmania.** Deloitte Access Economics (2013) provide a set of key economic multipliers for the Tasmanian tourism industry based on their CGE model (see Table 9). These are used in the study and are known to be considered relatively generous in their estimation of how important a dollar spend from a tourist in Tasmania is. The multipliers can be interpreted as follow: every additional million dollars spent by tourists in the Tasmanian economy is estimated to generate about $900,000 in gross state product (GSP) initially, then reducing to $700,000 as the effects of additional economic activity diminish over time. Additionally a gradually diminishing employment effect of 12.46 Full Time Equivalent positions (FTE) initially down to 8.11 FTE in 2020. We will use the more conservative 2020 multipliers to estimate the indirect and flow–on effects of tourism expenditure on GSP and FTE.

   **Table 9 Economic multiplying effect from tourism expenditure in Tasmania**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GSP: Expenditure</td>
<td>0.9</td>
<td>0.82</td>
<td>0.78</td>
<td>0.75</td>
<td>0.73</td>
<td>0.72</td>
<td>0.71</td>
<td>0.7</td>
</tr>
<tr>
<td>Employment: Expenditure ($m)</td>
<td>12.46</td>
<td>10.96</td>
<td>10.01</td>
<td>9.42</td>
<td>8.97</td>
<td>8.62</td>
<td>8.34</td>
<td>8.11</td>
</tr>
</tbody>
</table>

Source: Deloitte Access Economics 2013

2. **Baseline of expected tourism growth over the next few years to 2020.** This work was undertaken by Tourism Industry Council Tasmania (as in the Deloitte Access Economics 2013 Report). As this is the only known place for projects, we use their percentage change from 2012 to 2020 in Gross State Product (GSP) as a proxy for tourism growth, shown below in Table 10.

   **Table 10 Baseline expected growth in the Tasmanian tourism industry**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>–</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: calculated from Deloitte Access Economics 2013
3. **Actual expenditure from tourism in Tasmania.** This information is sourced from Tourism Research Australia (2013) and the State Tourism Satellite Accounts (Pham, Kookana & Silec 2013). This source identifies that in 2011–12 tourist’s expenditure contributed $1,018 million to the Total Gross State Product and employed 16,000 FTE. We use this contribution of tourist to GSP as the baseline figure to then apply the projected growth as identified in the step above. We also use the ratio provided in these figures to estimate how many FTE will be employed based on projections in GSP: Based on the above figures, it is one FTE for every $63.6 million in GSP. The last estimate we calculate for projects is spend per tourist; this is a broad number identified as the GSP divided by the total number of tourists in 2012 (77,100 as found in the TVS). Leaving a ratio of every tourist’s worth to the state economy, as an average of $13,203.63 in a year.

2.11 **Summary**

The goal of this research was to decipher stakeholder attitudes towards sustainable tourism in Tasmania, using three case studies. This chapter assessed the methods used to complete this task. It outlined three iterative phases of research. The first phase involved interviews of Tasmanian stakeholders including tourist operators, locals, members of community groups and those in regulatory positions. During this stage, we conducted in–depth interviews, including a photographic Q sort process, where participants ranked their preferred tourism development option. The selection of these photographs was based upon a sustainability spectrum that was developed using the work of Boyd and Butler (1996) as inspiration. The interviews in phase 1 also asked stakeholders for their views on the regions, tourism in the region and their attitudes towards tourism development in the other two case study regions.

This chapter outlined the methods used for analysing the results of Phase 1. Specifically we used mixed methods to elicit statistically significant photographs and to understand why stakeholders held specific attitudes.

Following this, the chapter outlined the methods used to assess Phase 2 of the research, where domestic tourists to Tasmania ranked tourism development scenarios. These scenarios arose from the attitude clusters, which arose in the first phase of research. This chapter also outlined the quantitative methods used to analyse these results.

Finally, this chapter described the methods employed by the third and final phase of research. This phase sought to forecast the economic impacts of the Tasmania tourist scenarios at the case study levels and also for the state of Tasmania. The method of second order Q sort analysis was outlined, along with the economic techniques employed.

The following chapter describes the results of the first two phases of research that we conducted in the Tarkine region of Tasmania.
CHAPTER 3
The Tarkine

In this chapter we outline the two phases of data collection that occurred in the Tarkine region of Tasmania. Phase 1 involved interviews of Tasmanian stakeholders who completed a photographic Q sort and ranked their preferences for tourism development in their region. Participants also answered a series of open and closed questions pertaining to their attitudes towards the region and tourism development within it.

Phase 2 involved tourists in ranking tourism development scenarios that had been developed from the results of Phase 1. This second phase sought to decipher what type of tourism visitors to Tasmania preferred.

Finally, this chapter outlines the specific issues regarding tourism development that emerged from the Tarkine case study.

3.1 Introduction

Phase 1 sought to reveal a range of aspects related to Tasmanian stakeholders’ opinions on how tourism should be developed in the Tarkine. During Phase 1, we interviewed total of 38 Tasmanian stakeholders, including tourism operators, those in regulatory positions related to tourism and members of non–governmental organisations. We interviewed individuals in relation to his or her views on the Tarkine region. Questions explored their opinions on: what the region means to them; their opinions on the amount and nature of existing tourism in the region; their attachment to the place in terms of livelihood and strength of attachment; demographic questions; and involved a Q sort process. The latter required participants to sort 32 photographs that were selected to illustrate differing levels of sustainable tourism development. The photographs included different levels of transport; tourism activities; built infrastructure such as track and roads; crowding; accommodation and supporting infrastructure. We taped and transcribed the interviews. Using factor analysis to assess the Q sort process in Phase 1, we were able to develop three photographic scenarios for the Tarkine.

During Phase 2, we tested 55 domestic tourists’ preferences for these three photographic scenarios via a self–completed survey. The results revealed very different attitudes existed amongst domestic tourists in terms of their preferences for tourism development.

3.2 Background to the Tarkine region

Located in the north–west region of Tasmania, the Tarkine has considerable environmental values and is home to the most extensive and least fragmented areas of cool temperate rainforest in Australia. The landscape includes rugged high–energy coastlines, buttongrass plains and rainforest. This tract of rainforest contains extensive high–quality wilderness and natural landscape values. The region supports a high diversity of non–vascular plants such as moss, liverwort and lichen, and provides habitat for more than 60 rare, threatened and endangered species of flora and fauna. This
flora has links to the ancient continent of Gondwana and illustrates Australia's evolution (Department of Sustainability, Environment, Water, Population and Communities 2004: 14).

The Tarkine has a wide range of nationally important cultural values associated with extensive historic Aboriginal occupation (Legge 1928). The term ‘Tarkine’ is the diminutive of ‘Tarkineer’, used to describe Aboriginal tribes who inhabited western Tasmania before European colonisation. Aboriginal hut depressions and extensive shell middens attest to a specialised way of life based on gathering shellfish, hunting seals and land mammals (Department of the Environment 2014).

The region is widely recognised for its distinctive aesthetic qualities that include the combination of coastal, rainforest and mountainous landscapes (Kirkpatrick 2012). Callidendrous temperate rainforest with extensive moss are highly photographed and widely recognised as a distinct attribute (Kantvillas & Jarman 1993). The buttongrass moorlands of the Meredith Range offer panoramic views of the region.

The Tarkine is generally considered as the north–west region of Tasmania between the Pieman River in the south, the Arthur River in the north, the Southern Ocean in the west and the Murchison Highway in the east. The only reserve in the region is the Savage River National Park representing 17,980 hectares. This park protects a large contiguous area of cool temperate rainforest and a pristine gorge system. It is remote from human settlement and offers no facilities or roads. Surrounding the national park is the smaller Savage River Regional Reserve and State Forest (Tasmania Parks and Wildlife Service 2014a).

Under Australian legislation, the region was nominated in 2009 as a National Heritage Area following an Emergency National Heritage Listing. The emergency listing reflected concerns regarding a proposed road through the region. The Australian Heritage Council recommended that 433,000 hectares be listed, but this was rejected by the Australian Government. The Tarkine National Coalition (2014) has proposed a national park for the region, however, this designation was not supported by the Tasmanian Government. Instead, the state government has actively supported mineral exploration and mining development to bolster the local economy. A number of tourism operators specialise in offering guided walks and accommodation throughout the region. For example, the township of Corinna has substantially increased visitation to the Tarkine region by offering forest walks and river cruises (Corinna 2014). The Western Explorer Road is an important strategic route for tourism and encourages self-guided drives. Local webpages provide an excellent source of information on the Tarkine including: travel information, accommodation, recreational opportunities and sustainable tourism support (Discover the Tarkine 2014).
3.3 The research experience

One of the most unexpected aspects of this study was the reaction of Tasmanians with an interest in the Tarkine to this study. During the planning phase, the research team ensured that information sheets were sent to local councils, and regional tourism bodies. Several media releases were also disseminated in a variety of local and state media outlets, to ensure that there was a high level of awareness of the research.
The selection of locations to conduct the interviews was problematic. The Tarkine is regarded by some as an enigma whose name is not officially recognised and whose physical boundaries are imprecise (Cradle Coast Authority 2008). It was decided to define the boundaries of the region using the tourism industry’s definition, which extends west to the Murchison Highway, south to the Pieman River and north to the Arthur River (see figure above). Within this region, there were several townships where the research could have been conducted, including Waratah, Savage River and Arthur River. Our priority was to make contact with a broad cross section of local people, and those with a broad set of political views. This was particularly important given the fierce debates that have occurred in the region over issues such as the creation of the Western Explorer Road; mining in the northern section of the Tarkine; and the Forest Peace Deal. Consequently, we decided to base our research outside the boundaries of the region in two locations. The first of these was the township of Smithton. Located to the north of the Tarkine, Smithton’s population is more than 3,600 people and the town is the major service centre for the Tarkine. It provides a range of facilities that are not available in the Tarkine itself. These include doctors’ clinics, a large Woolworths’ supermarket and a hospital.
Our Q sort interview required participants to sort photographs, needed a location that was relatively protected from the weather and was located in a high pedestrian zone. For this reason, we chose to base our research outside the Woolworths in Smithton (see image above). The Smithton supermarket provided a reasonable flow of people, however, it did not offer desirable participation rates as many were either not interested, too busy, had children with them or wanted to attend to their frozen foods. The attitude and behaviour of some people demonstrated a clear distaste for tourism research. It was apparent that the community had strong views towards how the region should be managed, with a preference for traditional industries such as mining or forestry. After consultation with a colleague who was a resident to the region, it was clear that the local community was very tense and under a lot of pressure, suggesting it was not an ideal place to conduct research.

A plan for a return visit to Smithton two months later was unsuccessful. First, venue options were limited, second, venue managers did not want to be associated with the research or seen to be supporting it, and third, it became apparent that the research was not welcomed by some locals who mistakenly believed our interest in tourism research meant we were ‘greenies’.

Wynyard, a larger community than Smithton and on the eastern edge of the Tarkine region, was selected as the location to gather the remaining data. Wynyard is less of an agricultural service centre and more well known as a town where tourists base themselves, prior to travelling to the Tarkine. In contrast to Smithton, permission was given for a greater range of venue options and there was generally a greater acceptance of the research. While the community appeared more accepting of our presence in Wynyard, the opinions towards tourism appeared similar to those captured in Smithton and resident participation continued to be difficult.
In both Smithton and Wynyard, participants under the age of 50 years were generally unwilling to participate. Indeed, in Smithton it was rare to see people aged between 18–49 years and where it did occur it was usually in a family setting restricting their ability to participate. While there were more youth in Wynyard, they were often under 18 years old. The younger demographic (18–49 years) were scarce; locals who stated during their interviews that young families and individuals were moving to other parts of the state and interstate to find work, and/or were too busy with work and life commitments to participate in our study confirmed this.

3.4 Phase 1: Results of the stakeholder Q sort

3.4.1 Tasmanian’s attitude clusters

Analysis of the interviews occurred in two ways: first through a Q method (factor analysis) as described in Chapter 2, and second through a qualitative analysis of the responses to the open-ended questions. A decision was made to use a three-factor solution in the Tarkine. As described in Chapter 2, each factor group that was identified using the PQmethod software was comprised of respondents who held similar attitudes to tourism development in the Tarkine. We named these groups attitude clusters.

3.4.2 Principles underpinning the development of the attitude clusters

Our Attitude Clusters have been developed to tell an image driven story that represents the defining features of each category, in terms of their preferred tourism development preferences for each case study region. Consequently, the Attitude Clusters are defined by of photographs that were statistically significant and assisted in the description of the Attitude Clusters’ attributes.

3.4.3 Attitude Cluster 1: Protectionists

This attitude cluster had stakeholders from each of the community groups within it.

Table 8  Count of respondent categories in attitude clusters

<table>
<thead>
<tr>
<th>Category</th>
<th>Protectionists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>4</td>
</tr>
<tr>
<td>Regulators</td>
<td>2</td>
</tr>
<tr>
<td>Community</td>
<td>1</td>
</tr>
<tr>
<td>Locals</td>
<td>11</td>
</tr>
<tr>
<td>Total</td>
<td>18</td>
</tr>
</tbody>
</table>
**Protectionists’ attitudes towards the Tarkine**

When asked what word best describes the Tarkine, Protectionists described the Tarkine as a diverse landscape, valued for many reasons from its uniqueness, wildness, challenging nature, pristine-ness, ancient landscape and cultural importance. They also described it as vulnerable, endangered and misunderstood. The dominant feeling among Protectionists was that the Tarkine needs to be protected.

**Protectionists’ attitudes towards tourism in the Tarkine**

Protectionists, despite their name, supported tourism in the Tarkine. Some saw it as the saviour for the Tarkine, while others saw it as too fraught with difficulties to be considered a potential saviour (although still worthwhile). Protectionists were of the opinion that tourism needs to be sustainable and controlled, and that effort needs to go into promotion and facility development.

![Preferences for number of tourists in the Tarkine](image)

**Figure 2 Preferences for number of tourists in the Tarkine**

Protectionists were willing to see more tourists in the region but wanted to ensure that tourism was developed sustainably (Figure 2). Suggestions included a need for more infrastructure, a stronger brand, future tourism that capitalised on the cultural and natural assets of the region, a more even spread of visitation across the seasons, and the need for stronger identity and/or brand for the Tarkine.

[Operator #18] ‘... more [tourism] in winter yes, maxed out during summer so wouldn’t want more tourists during this period.’

[Local #5] ‘... more [tourism], in some areas determined by impact. We don’t know what we want to do with the Tarkine. We need to limit damage and get people’s attitudes to change. There is too much division, not a lot of
forward thinking. Strength of government and liaison is required. We need to integrate a system of industries to make the region sustainable.’

[Member of Community Group #19] ‘...I think it should certainly be attracting more [tourists]. The infrastructure work to make that happen is really important but it’s an area until the last decade that really hasn’t had a high level of visitation and it’s growing and there’s business developing.’

[Regulator #16] ‘...more tourists, we could easily attract more tourists. At the moment there is a bit of an identity crisis, not really sure what to promote in the community. There are some definite values that could be promoted and hold high interest from interstate and overseas visitors, the key is to tap into the aboriginal heritage, which is scattered throughout the landscape and is deteriorating naturally. When people think of the Tarkine they mostly think of wilderness and rainforest trees, which are mostly inaccessible but the coastal area is very accessible but very little is known about those areas, other than locals who have shack and go four-wheel driving and they don’t understand the values or the significance of it.’

Protectionists’ preferred form of tourism development: Q sort

The defining photographs that characterise Protectionists’ preferences included a photograph of an undeveloped track, bushwalking paths and bushwalkers.

Photographs that Protectionists ‘Liked’

The comments made by Protectionists during their Q sort indicated their desire for tourism activity in the Tarkine but with a strong preference for this to have minimal impact, and have controls of impact and numbers. Protectionists also wanted tourism that caters for a range of people, including the elderly and the disabled, such as via boardwalks.

Protectionists’ attitudes towards the statistically significant photographs are:

Photo of Undeveloped Track

[Local 84] ‘...because it is as it is, it’s naturally left and hasn’t been interfered with ... there is a track there but doesn’t have people riding through on bikes and all that sort of stuff.’

[Community Member 19] ‘... I think that’s the classic image of what people want when they come to the Tarkine. They want to get into a rainforest and experience it at its most natural. I guess that’s
the ideal for most people and then ... unfortunately you can’t have that for one hundred visitors a day ... it doesn’t stay like that you will end up with a great big muddy rough track—that’s the challenge ... you eventually you have to start looking at this stuff... for really large numbers.’

[Operator 34] ‘... I think this looks like a very non–impact walk there and allowing people to experience the Tarkine in a non–impact way without having to be with a guide. A constant problem for us is people going. We really want to do the Tarkine but not a two thousand dollar trip. There has to be provision for those people to go and experience it. All the businesses would still flourish despite the fact they don’t go with us and these are the people we want there. This is what Tasmania is about, they get out camping, they get out into the wilderness...the Tarkine is fabulous.’

Photo of Two Bushwalkers

[Local 89] ‘...It’s natural, not too much impact.’

[Regulator 35] ‘...if you look at those in some level of isolation it’s reflecting on the natural environment of the Tarkine but its reflecting on the protected use of it. ...they are accessible tracks and you don’t get the tendency to say well, if I’m walking it, I might actually go here instead. ...it’s a great environment, use it wisely, use it for all of these purposes but there is that level of protection and maintenance required.’

Photo of Hardened Track no Edges

[Local 8] ‘... limits destruction to environment, it’s controlled and there are no motorised noises.’

[Community Member 19] ‘...it’s putting in some infrastructure to protect the area but allowing larger numbers to go in.’

Forms of tourism development that ‘Protectionists’ disliked

Analysis of this Attitude Cluster also revealed the photographs that Protectionists disliked, along with their reasoning. These included: a photograph of a lone motorbike; a group of quad bikes; and a motorised vehicle (see pictures below). The attitudes towards these forms of tourism development included: seeing these as totally inappropriate because they are environmentally destructive; believing they were noisy; feeling that they impede other activities; being hard or impossible to manage; and often engaged in by people who focused on the thrill of the activity and who did not care or respect the environment.
It should be noted that a small number of Protectionists supported these activities as long as they were conducted on private land or land set aside for that use only.

Photographs that defined what Protectionist do not want in terms of tourism development in the Tarkine

3.4.4 Attitude Cluster 2: Multi–Users

This Attitude Cluster’s defining feature was that it had no stakeholders from the regulator group.

Table 9 Count of individual stakeholders in the Multi–User Clusters

<table>
<thead>
<tr>
<th></th>
<th>Multi–Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
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<tr>
<td>Regulators</td>
<td>0</td>
</tr>
<tr>
<td>Community</td>
<td>2</td>
</tr>
<tr>
<td>Locals</td>
<td>3</td>
</tr>
<tr>
<td>Total</td>
<td>6</td>
</tr>
</tbody>
</table>

Multi–Users’ attitudes towards the Tarkine

Multi–Users were a coherent group in terms of their preferred tourism activities, but differed in terms of their interpretations of the appropriateness of tourism to the region. Multi–Users described the Tarkine as unique, picturesque and marvellous. However, they also recognised that the region has many uses and a history of 150 years of activities such as logging and mining. One person mentioned that it is a potential ‘fire ball’ and was not being managed properly.

Multi–Users’ attitudes towards tourism in the Tarkine

Members of this attitude cluster had two views on tourism: the first is that tourism is unlikely to be viable in this region, because the existing tourism opportunities were limited and the region was ‘boring’ unless visitors were able to access the coast.

The other group of Multi–Users saw tourism in a positive light, believing it allows for the isolation and landscape to be experienced. They did however recognise that tourism is hampered by a lack of development, especially roads and access to the area, meaning that it is currently only accessible to people who can hike to access it (Figure 3).
The divisions in this group centred around the impacts of tourism development: this became evident when explaining why they preferred more, less or the same tourism development (Figure 3). Some wanted more tourism, but only if infrastructure was provided. They were clearly resentful towards what they perceived as ‘Greens who did not want development’ and they said:

[Local #3] ‘...more infrastructure is required to support increased volume, especially by opening it up. Problem arises when/if the Tarkine is opened up so the Greens can close it down. People don’t really understand it all. Forestry has suffered and there is a public misconception of how the Tarkine is being managed.

[Local #10] ‘...wouldn’t like to see over-crowding or changes in infrastructure requirements. No further infrastructure as it makes no difference. Stanley is the last stop for majority of tourists and I think the locals aren’t supportive.’

Other Multi–Users wanted the same level of tourism in order to protect the sense of remoteness:

[Member of a Member Group #20] ‘...about the same. We (four–wheel driving club) don’t want more there. The attraction is the freedom and being away from highly populated areas.’

---

**Figure 3** Preferences for number of tourists in the Tarkine
And a third group of multi-users wanted fewer tourists in the region and felt the region was largely misunderstood:

[Local#6] ‘...fewer, don’t think it can be a major tourism attraction. There is capacity to increase tourism numbers if managed properly. Government doesn’t understand the region.’

**Multi–Users’ preferred form of tourism development: Q sort**

The defining photographs that characterise this group stood in stark contrast to Protectionists. Multi–Users ‘liked’ photographs included: the lone horse rider; a group of quad bikes; and a photograph of the motorised vehicle (see Q sort below).

**Photographs that Multi–Users ‘Liked’**

![Photographs](image)

To many Multi–Users, their selection of activity reflected an activity of their preference. These activities were seen as good ways to access much of what the Tarkine has to offer, and experience the bush, landscapes and beaches. Moreover, the forms of motorised transport were also seen as able to provide access for the elderly, people with a disability or family groups. One person indicated that a system of education and permits would be necessary to ensure minimal damage.

**Multi–Users’ attitudes towards the statistically significant photographs included:**

**Photo of Horse Rider:**

[Member of a Community Group #97] ‘... I think the horse riding, not so much the horse riding but beach combing... more than the horse riding. That’s wonderful beaches that we walk on all the time and there’s the birds and there’s the sunsets, there’s the clean air ... that sort of thing.’

[Operator #37] ‘... it’s the family oriented thing.’

**Photo of Quad Bikes:**

[Member of a Community Group #97] ‘... the challenge of doing the riding, it’s riding through the environment and you gain access to the best beaches in the world. Sandy Cape beach, Arthur River beach... Small groups with registration and permits and everything else like that... when they buy their permits they’ve gone through a registration process to say that I’ve looked at this DVD, I understand the importance of staying on
the track, I understand that I’ve got to be licenced for MIAB, I understand that I am not allowed to destroy the area.’

[Operator #37] ‘... we’ve got to have four–wheel driving club don’t we, that’s a big percentage of the west coast and this region: four–wheel driving club, camping, fishing, sightseeing, tranquillity.’

Motorised Vehicle

[Local 10 #33] ‘...four–wheel driving club is not that bad, I don’t like it but people want to do it.’

[Member of Community Group #10] ‘...exploring and getting around, as you get older can’t walk around as much and need to have the freedom of being self–sufficient.’

Forms of tourism development that multi–users disliked

The photographs that multi–users disliked were described as undesirable because: they felt they were not needed in the Tarkine; they existed in Cradle Mountain already and the Tarkine should establish itself as different and more natural than Cradle Mountain. Interestingly, many of the images that were disliked contained significant forms of accommodation, and associated tourism infrastructure.

Photographs that defined what multi–users did not want in terms of Tourism Development in the Tarkine.

Examples of their explanation of their dislikes about certain types of tourism development depicted through the photographs included:

Photo of an Eco–Lodge

[Member of a Community Group #48] ‘...I don’t like the idea of sole right to the area, takes beauty away and too commercial.’

[Member of a Community Group #97] ‘...I don’t think we need it in the Tarkine...we’ve already got this type of tourism with Cradle mountain and down the south–west walk which both we’ve done both those walks. I think we’ve got that type of tourism ... we want to be a bit more natural.’
3.4.5 **Attitude Cluster 3: Rugged Pragmatists**

The Rugged Pragmatists Attitude Cluster had stakeholders from each of the community groups within it (see Table 10).

<table>
<thead>
<tr>
<th></th>
<th>Rugged Pragmatists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>2</td>
</tr>
<tr>
<td>Regulators</td>
<td>2</td>
</tr>
<tr>
<td>Community</td>
<td>1</td>
</tr>
<tr>
<td>Locals</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8</strong></td>
</tr>
</tbody>
</table>

**Rugged Pragmatists’ attitudes towards the Tarkine**

Rugged pragmatists described the Tarkine as a place where the landscape and biodiversity is extremely diverse, resulting in it being a very beautiful and rugged location. They recognised that it is subject to controversy regarding its name, its values and its use. Significantly, when describing the area, this Attitude Cluster did not mention the word ‘pristine’.

**Rugged Pragmatists’ attitudes towards Tourism in the Tarkine**

Rugged Pragmatists were divided in their views on tourism. Some argued that more resources were needed in order to manage the impact of tourism, and ensuring tourism is environmentally sustainable. Others argued that the region is undeveloped, meaning tourists ‘only get at the edges of it’, and as such, the regions’ tourism potential is limited.

Rugged Pragmatists differed from the other Attitude Clusters in that all stakeholder groups agreed that more tourists were needed in the Tarkine (Figure 4).
Reasons for their preferences reflected the pragmatic nature of this group, who desired limits to growth, and who recognised the contentious history of the area along with its tourism potential:

**Operator #14**  ‘...I think that’s the only way of saving it is to promote it and let more people see it and see it for what it is... It’s like my guests as soon as they do that rainforest walk they come out of the forest different people.’

**[Member of a Community Group #15]**  ‘... it should be attracting more in that our regional economy is struggling, tourism in this region is stagnant or even to the point of declining and we’ve got this wonderful potential tourism drawcard that’s occupying eighty percent of the Cradle Coast region and we’re basically not utilising it. Excepting that, there are a handful of small businesses that are making a dollar out of the Tarkine but it’s only a couple and it’s not many dollars.’

**[Operator 36]**  ‘... more tourists but there needs to be possibly more infrastructure... small amount of infrastructure but probably planned out a little bit better for them, as far as things to do... stop people from going too far off track...’

**[Regulator #33]**  ‘... Catch twenty–two because if it has infrastructure it could attract more tourists but where do they go? Corinna has capacity. Tarkine has good values therefore more visitors with more scope for more experiences. As a remote part of NW it struggle for jobs.’
Rugged Pragmatists’ Preferred form of Tourism Development: Q sort

The photographs that characterised this group included photographs of tourism development options: a kayak, a lone tent in the wilderness and a group of cabins.

**Photographs that Rugged Pragmatists ‘Liked’**

Analysis of this Attitude Cluster revealed concern over the need for more tourism opportunities for visitors – including activities they can do, and a range of accommodation options. Stakeholders within this group expressed a desire for tourism activities to ‘fit in’ with the Tarkine, for activities and accommodation to be low in environmental impact activities and to cater for the free independent traveller. They wanted people to experience the environment and develop an appreciation for it.

Rugged Pragmatists’ attitudes towards the defining photographs included:

**Photo of Lone Kayaker:**

[Local #2] ‘...provides a variety of activities to support different interests.’

[Regulator #21] ‘... there’s some fantastic waterways, potential around kayak tourism opportunity, camping and that sort of thing, it gets to the essence about what I think people think the Tarkine is.’

**Photo of Lone Tent:**

[Local #2] ‘...provides choice of accommodation so long as this doesn’t turn into hundreds of choices.’

[Operator #36] ‘...it represents a range of what people can do there independently, which is good and should always allow people to do this...having something that is accessible for people who wouldn’t do it this way is really important because you get people to go down there and experience it...something for everybody.’
The forms of tourism development that Rugged Pragmatists ‘disliked’

Analysis of this Attitude Cluster also revealed the photographs that Rugged Pragmatists liked, along with their reasoning. The photographs that defined what this group disliked included a photograph of several resorts; a road that was highly developed; and a photograph of many people walking.

Photographs that Rugged Pragmatists ‘Disliked’

Attitude Clusters of Tasmanian- based stakeholders within the Tarkine

Protectionists
Protectionists are a group of people who described the Tarkine as a diverse landscape, valued for many reasons from its uniqueness, wildness, challenging nature, pristine-ness, ancient landscape and cultural importance. They also described it as vulnerable, endangered, and misunderstood. The dominant feeling among Protectionists was that the Tarkine needs to be protected. They indicated their desire for tourism activity in the Tarkine but with a strong preference for tourism experiences to allow for immersive nature based experiences.

Multi–Users
Multi–Users want to encourage tourism to the Tarkine that enables people to access and experience the wonderful natural places. They value activities that can be done by the family and are accessible to the less fit or able. Members of this attitude cluster agree with the use of motorised activities in the Tarkine and believe they should be provided. They do not want obvious infrastructure development within the Tarkine, and feel that other places (such as Cradle Mountain) offer more substantial accommodation, board walks et cetera, and as such, the Tarkine should offer something different.

Rugged Pragmatists
Rugged Pragmatists are concerned about the opportunity for visitors – activities they can do, and a range of accommodation options. They want a range as long as they all ‘fit in’ with the Tarkine. Rugged Pragmatists want to see low impact activities and accommodation are independent activities. They want people to experience, interact with the environment, and develop an appreciation for it. They do not want major roads through the area as they believe they are unnecessary, harmful to wildlife and likely to be littered with rubbish.
Rugged Pragmatists did not like these forms of tourism development because they felt the accommodation did not suit the area, and did not match the character of the Tarkine. They also suggested that the road looked out of place and there was concern that it would result in high volume, faster traffic and associated impacts such as road kill and rubbish. They felt that roads, such as the one in the photograph should only be in limited places. The track with many people on it was disliked because it did not encourage interaction with the environment and was seen as aesthetically unattractive. Overall, it appeared that stakeholders in this Attitude Cluster were concerned about the forms of infrastructure and volume of visitors. Their preference was that the Tarkine should attract low numbers or small, controlled and managed groups.

3.5 Phase 2: Assessment of tourists’ preferences for tourism development

The objective of Phase 2 was to test tourists’ preferences for tourism development in the Tarkine. Following our factor analysis of the Q sort process in Phase 1, we developed three tourism development options for the Tarkine that were based on the defining photographs of each Attitude Cluster. These scenarios were tested with 55 tourists from the Tarkine via a survey that also contained demographic and attitudinal questions. This allowed us to assess the tourists against the segments that are regarded by Tourism Tasmania as their target markets (discussed in Chapter 6).

The surveys were self-administered and were given to domestic tourists travelling on the ferry, that is needed to cross the Pieman River, and tourists travelling on the Pieman River Cruise. The survey was conducted in January–February 2014.

3.5.1 Tourists’ preferences for attitude clusters

Tourists ranked the three options for tourism development in the Tarkine. These options included the ‘liked’ photographs from each of the Attitude Clusters (see images below).

Development Option 1 – Derived from the ‘Protectionists’ Attitude Cluster

![Image 1]

Development Option 2 – Derived from the ‘Multi–Users’ Attitude Cluster

![Image 2]
In the Tarkine, most tourists ranked Development Option 1 (80%) first. The least preferred was Development Option 2, with 92% tourists ranking it last. Development Option 3 was ranked second by 75% of respondents, but ranked first by only 20% of people (Figure 5).

Some of the responses from those that ranked Development Option 1 the highest included:

‘...protect the Tarkine.’
‘Less development, more wilderness.’
‘More options for fishing and viewing animals in wilderness.’
‘Animal viewing, less trails and roads, western connector open.’
‘The wildness experience that Corinna provides for visitors to stay in cottages which in fact impact little on the environment, that is, having solar power and waste management that make visitors take responsibility for our impact on nature and enjoy the experience.’
‘...nature–based environmental education and interpretation.’
Some of the reasons why Development Option 3 was ranked the highest included:

‘More fishing’

‘Improve existing development and preserve as much undisturbed wilderness as possible.’

3.5.2 Tourists’ preferences for tourism development

Despite a strong desire for minimal impact forms of tourism development in the Tarkine, 52.7% of domestic tourists to the Tarkine suggested they would like the same amount of tourists to the Tarkine. Conversely, 38.2% wanted more and only 5.5% wanted fewer (Figure 6).

![Tourists’ Preferences for Number of Tourists](image)

**Figure 6** Tourists’ preferences for number of tourists to the region
3.5.3 Tourists’ visitation characteristics

Not surprisingly given the location of the Tarkine, almost all visitors were travelling around Tasmania in a car (Figure 7).

Transport used while in Tasmania

![Graph showing transport used while in Tasmania]

**Figure 7** Transport used while in Tasmania

Domestic tourists’ most common length of stay in Tasmania was 14 days, which is far higher than the state visitation average of 8.6 nights (Tourism Tasmania 2013a). The majority of visitors were from Victoria (56.4%), followed by New South Wales (29.1%), with Queensland visitors occupying a far smaller share of 3.5% (Figure 8).
Origin of Interstate Visitors to the Tarkine.

The largest percentage of tourists to the Tarkine (47.3%) were aged 61 and older, followed by 34.5% aged 51–60. 14.5% were aged between 31–50 years of ages and only 3.5% were between 41–50 years of age.

Tourism Tasmania has identified their target market for future tourism marketing and growth, based on tourist visitation preferences. Specifically they seek to attract tourists that are interested in nature–based tourism; history and culture; fine wine and food; and arts activities. As is evident from Table 11 below, tourists to Tarkine were very interested in nature–based tourism (78%) and History and Cultural sites (73%). They were then divided on the interested in food and wine and arts and cultural locations (Table 11).

Given these travel preferences, tourists’ preferences for the tourism development scenarios and that 52.7% of tourists’ preferred the number of tourists in the region to stay the same; it appears that their preference is for small–scale, environmentally sensitive, nature–based tourism experiences.
Table 11  Preferences of Tarkine tourists to visit specific tourist activities

<table>
<thead>
<tr>
<th>Nature Based Locations</th>
<th>Not at all interested</th>
<th>Slightly Interested</th>
<th>I don't have an opinion</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>78%</td>
<td>20%</td>
</tr>
<tr>
<td>History and Cultural sites</td>
<td>0%</td>
<td>22%</td>
<td>4%</td>
<td>73%</td>
<td>2%</td>
</tr>
<tr>
<td>Visit Fine Wine and Food</td>
<td>16%</td>
<td>35%</td>
<td>0%</td>
<td>49%</td>
<td>0%</td>
</tr>
<tr>
<td>Arts and cultural locations</td>
<td>11%</td>
<td>44%</td>
<td>2%</td>
<td>44%</td>
<td>0%</td>
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</tbody>
</table>
3.6 Summary

This chapter outlined the two phases of data collection that occurred in the Tarkine region of Tasmania. Phase 1 involved interviews of Tasmanian stakeholders who completed an interview. The stakeholder groups for this study were identified as including locals, tourism operators, those in regulatory positions related to tourism and member of community groups or non–governmental organisations. The interview involved a photographic Q sort, where participants ranked their preferences for tourism development in their region. Using statistical analysis, combined with textual analysis, the research team deciphered three attitude clusters based on stakeholders’ preferences for tourism development. Interestingly, their attitudes did not align specifically with the stakeholder group. Three attitude clusters emerged. These were:

- **Protectionists** who supported an increase in minimal impact tourism but only if managed sustainably.

- **Multi–Users** who wanted to encourage tourism to the Tarkine that enables people to access and experience the wonderful natural places. Multi-users valued activities that could be done by the family and were accessible to the less fit or able, including motorised activities such as motorbike riding, four–wheel driving club and quad biking

- **Rugged Pragmatists** were concerned with providing opportunities for visitors – including activities and a range of accommodation options.

The chapter then described Phase 2, where tourists ranked tourism development scenarios that had been developed from the results of Phase 1. In the case of the Tarkine, tourist preferences aligned strongly with ‘Protectionists’, thus suggesting the potential for conflict and a real need for consultation over future tourism development in the Tarkine region. Despite a strong desire for minimal impact forms of tourism development in the Tarkine, half of domestic tourists who were surveyed suggested they would like the same amount of tourists to the Tarkine. Conversely, 38.2% wanted more and only 5.5% wanted fewer.
CHAPTER 4

Bathurst Harbour

This chapter outlines the two phases of data collection that occurred in the Bathurst Harbour region of Tasmania. Phase 1 involved interviews of Tasmanian stakeholders who completed a photographic Q sort and ranked their preferences for tourism development in their region. Participants were also asked to answer a series of open and closed questions pertaining to their attitudes towards the region and tourism development within it.

This chapter also describes Phase 2, where tourists ranked tourism scenarios that had been developed from the results of Phase 1. This second phase sought to decipher what type of tourism visitors to Tasmania preferred.

Finally, Chapter 4 outlines the specific issues regarding tourism development that emerged from the Bathurst Harbour case study.

4.1 Introduction

Phase 1 sought to reveal a range of aspects related to Tasmanian stakeholders’ opinions on how tourism should be developed in Bathurst Harbour. During Phase 1, we interviewed 14 stakeholders, including tourism operators, those in regulatory positions related to tourism and members of non-governmental organisations. As the Bathurst Harbour region is extremely remote, the local population consists only of two families who mined the region for tin in the mid-1900s and the traditional landowners. As such, we made efforts to contact these groups.

As with the previous stages, we interviewed each stakeholder in relation to their views on the Bathurst Harbour region. Questions explored their opinions on: what the region means to them; their opinions on the amount and nature of existing tourism in the region; their attachment to the place in terms of livelihood and strength of attachment; demographic questions; and involved a Q sort process. The latter required participants to sort 32 photographs that were selected to illustrate differing levels of sustainable tourism development. The photographs included different levels of transport; tourism activities; built infrastructure such as track and roads; crowding; accommodation and supporting infrastructure. We taped and transcribed the interviews. Using factor analysis to assess the Q sort Phase 1, we were able to develop two photographic scenarios for the Bathurst Harbour Region.

During Phase 2, we tested 17 domestic tourists’ preferences for these three photographic scenarios via a self-completed survey. The results were difficult given the low response rates but revealed a great desire for low levels of development in the region.
4.2 **Background to the Bathurst Harbour Region**

Bathurst Harbour is located in the far south-west of Tasmania in the Southwest National Park and the Tasmanian Wilderness World Heritage Area (TWHA). The embayment of Port Davey–Bathurst Harbour has been described as the largest undisturbed estuarine system in southern Australia (Parks and Wildlife Service 1999:75). The harbour is connected by the narrow Bathurst Channel to Port Davey. The Port Davey Marine Reserve (Port Davey, Bathurst Channel and Bathurst Harbour) was declared in 2005 and represents a total of 17,753 ha) (Tasmania Parks and Wildlife Service 2014c).

The water in Bathurst Harbour is stained a deep red-brown due to the tannin rich run off from the surrounding heathlands. These tannins restrict sunlight penetration to the top few metres, which in turn limits marine plant growth (Tasmania Parks and Wildlife Service 2014c). The marine reserve protects all marine habitat, exposed reefs, gorges, bays, inlets, kelp forest, sea grass and muddy sediments. Low-lying alluvial plains with mountain ranges run along the western and eastern shores of the Harbour.

The area is extremely remote and has no permanent population. A few buildings, boat moorings and remnants from the tin mines in the early 1900s are found around the Harbour (Mattingley 2001). There is no vehicular access. Access is only possible by boat, airplane or walking. Marine access to the harbour is via Bathurst Channel from Port Davey. The Harbour provides safe anchorage from the Southern Ocean. The South Coast Track via Scots Peak Dam and the Port Davey Track via Cockle Creek provide the only walking access. A gravel airstrip at Melaleuca allows small airplanes to land. Walkers are either dropped off or picked up to be flown to Hobart.

Par Avion runs half day and overnight stays in the TWHA. ‘A Day in the Wilderness Tour’ involves a scenic one-hour flight from Cambridge airport landing at the Melaleuca airstrip. An Aboriginal interpretative walk is first undertaken followed by a boat trip to Port Davey (Par Avion 2014). The day trip is approximately 8 hours. The ‘South West Overnight Experiences’ allow visitors to stay in a luxury standing camp for three days and two nights. Guided walks are available.

Additional tourist opportunities also embrace the unique marine environment of the region. Roaring 40s Kayaking offers multi-day sea kayaking expeditions (Roaring 40s 2014). Hobart Yachts run the ‘Port Davey Charter’ as a seven-day, six-night trip to Port Davey/Bathurst Harbour (Hobart Yachts 2014). The 62 foot *Helsal IV* is the main charter vessel. She can accommodate up to 10 overnight and 18 for day trips. Cruise ships have also occasionally visited Bathurst Harbour. However, concerns have been raised regarding environmental impacts associated with ship turbulence (Ellis & Kriwoken 2006).
The Tasmanian Wilderness World Heritage Area (TWWHA) was nominated for World Heritage listing under four natural criteria and three cultural criteria. The three cultural criteria have particular relevance to Tasmanian Aboriginals:

- bears a unique or at least exceptional testimony to a civilisation which has disappeared;
- is an outstanding example of a traditional human settlement which is representative of a culture and which has become vulnerable under the impact of irreversible change; and
- is directly or tangibly associated with events or with ideas or beliefs of outstanding universal significance (Tasmania Parks and Wildlife Service 1999: 22).

In the TWWHA, there are a number of exceptionally rich, undisturbed Pleistocene Aboriginal sites dating back over 35,000 years. These sites include a wide range of archaeological site types such as: artefact scatters; shell middens; rock markings and shelters and stone arrangements (Aboriginal Heritage Tasmania 2014). A general lack of disturbance greatly enhances the value of these sites throughout the TWWHA.

The Southwest Tribe of Tasmanian Aboriginals was some of the most isolated peoples in Australia. Isolated from mainland Australian Aboriginals, they developed a unique hunter–gatherer way of life in a harsh landscape. They used fire to open up extensive hunting grounds and this directly impacted the vegetation in Southwest Tasmania. Kutikina Cave on the Franklin River was returned to the Aboriginal community and it is cooperatively managed with the Tasmania Parks and Wildlife Service.

The Needwonnee Walk is a recently installed sculpture interpreting the story of the Aboriginal people of the Melaleuca/Cox Bight region. There is a video of the walk and a booklet/DVD entitled ‘Needwonnee … connecting and sharing’ that describes the installation (Tasmania Parks and Wildlife Service 2014b).

Currently, the region and particularly the settlement of Melaleuca, where tin mining was once conducted, play an important role as a ‘hub’ for bushwalkers. The airstrip is used by walkers and marks the end, or beginning, of the seven–day hike called the South Coast Track. It also marks the start or end of the Port Davey track and numerous other lesser well–known track.

4.3 The research experience

The Bathurst Harbour region is unique because it is located deep within the Tasmanian Wilderness World Heritage Area. With the exception of two families who mined tin in the region and maintain their former residences, there is currently no permanent population in the region. We encountered great interest and support for our research, which formed a marked comparison to the Tarkine experience.
4.4 Phase 1: Results of the stakeholder Q sort

4.4.1 Tasmanian attitude clusters

Analysis of the interviews occurred in two ways: first through a Q sort (factor analysis) as described in Chapter 2, and second through a qualitative analysis of the responses to the open-ended questions. Following the recommendation of Brown (1980: 222), we included factors that had at least two significant loaders on the unrotated factor matrix. For Bathurst Harbour, we identified two attitude clusters of respondents that held similar attitudes to tourism development in Bathurst Harbour.

4.4.2 Principles underpinning the development of the attitude clusters

Our Attitude Clusters have been developed to tell an image driven story that represents the defining features of each category, in terms of their preferred tourism development preferences for each case study region. Consequently, the Attitude Clusters are defined by photographs that were statistically significant and assisted in the description of the Attitude Clusters’ attributes.

4.4.3 Attitude Cluster 1: Immersive Engagers

This attitude cluster had stakeholders from each of the community groups within it (Table 12).

<table>
<thead>
<tr>
<th>Immersive Engagers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>2</td>
</tr>
<tr>
<td>Regulators</td>
<td>3</td>
</tr>
<tr>
<td>Community</td>
<td>2</td>
</tr>
<tr>
<td>Locals</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>8</td>
</tr>
</tbody>
</table>

**Immersive Engagers attitudes towards Bathurst Harbour**

When asked what word best describes Bathurst Harbour, Immersive Engagers described it as a pristine, beautiful, tranquil but also rugged and remote landscape, that is dominated by tannin water ways and is environmentally important. It is fragile and ancient. The level of use or visitation is changing with a lot more planes and yachts.

**Immersive Engagers attitudes towards tourism in Bathurst Harbour**

Immersive Engagers expressed concern regarding the negative impact of tourism on Bathurst Harbour but they also believed that tourism was as yet ‘untapped’. Tourism in Bathurst Harbour should be sustainable or minimal impact, and should protect the visitor experiences that can be found there now. There was recognition that tourism was a lot of work for tourism operators, and that it caters for a relatively high–end market (Figure 9).
Immersive Engagers were divided in their opinions in tourism numbers in the region. The local and community group representatives wanted less and the same numbers of tourists respectively, but regulators and operators were unanimous in wanting more.

**Immersive Engagers’ preferred form of tourism development: Q sort**

The defining photographs that characterise Immersive Engagers’ preferences represented activities that are relatively tranquil in nature and where the environment seems to be of central importance. These include: a photograph of and bushwalkers, a lone kayak and a guided walk (see below).

**Photographs that Immersive Engagers ‘Liked’**

The comments made by Immersive Engagers during their Q sort indicated their desire for tourism activity in Bathurst Harbour but with a strong preference for control to ensure minimal environmental impact and retention of the existing tourist experience of remoteness.
Immersive Engagers’ attitudes towards the statistically significant photographs were:

**Photo of a Lone Kayak:**

[Operator 49] ‘...it is providing an alternative experience on the water with minimal impact.’

[Regulator 45] ‘...it captures what the unique essence of Bathurst Harbour is about. So, water ways, wilderness and wildlife. And immersed in those things in a very real way.’

**Photo of Two Bushwalkers**

[Community #69] ‘...here’s a level of interpretation, learning about the area, gaining an understanding, awareness and protection values.’

[Operator #39] ‘...well it’s giving interpretation to the area, which I think is important because of education.'

**Photo of Two Walkers on Foot**

[Local #82] ‘...not very many people in it, small party size.’

[Operator #24] ‘...there’s no big tracks, so that’s good.’

**Forms of tourism development that Immersive Engagers ‘disliked’**

Analysis of this attitude cluster also revealed the photographs that Immersive Engagers disliked, along with their reasoning. These included: a photograph of a motorised vehicle; a group of quad bikes; and an outback road with gravel edges (see images below). Immersive Engagers clearly took both the management and tourist operator perspective in pointing out that roads and motorised activity are not permitted in WHA areas, and that road access would not only have a negative environmental impact but also significantly impact on current tourist operator viability, such as the flights into Melaleuca. They also felt that roads and mechanised activity would also significantly impact on the experience of visitors with visual and noise pollution. Likewise, they felt that any large-scale development is inappropriate — Bathurst Harbour should retain its remote and environment focused experience.
Photographs that defined what Immersive Engagers do not want in terms of Tourism Development in Bathurst Harbour

4.4.4 Attitude Cluster 2: Immersive Planners

The Immersive Planners attitude cluster was similar to Immersive Engagers, but placed more emphasis on the use of infrastructure and the provision of publically managed infrastructure, rather than privately managed infrastructure (Table 13).

Table 13 Count of individual stakeholders in the Immersive Planners Cluster

<table>
<thead>
<tr>
<th></th>
<th>Immersive Planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>4</td>
</tr>
<tr>
<td>Regulators</td>
<td>1</td>
</tr>
<tr>
<td>Community</td>
<td>1</td>
</tr>
<tr>
<td>Locals</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>6</td>
</tr>
</tbody>
</table>

**Immersive Planners Attitudes towards the Bathurst Harbour**

The Immersive Planners see Bathurst Harbour as a pristine wilderness that is remote, timeless and beautiful. Its waterway is unique and to get there is hard. It is only 80 kilometres from Hobart, but feels a lot further.

**Immersive Planners towards Tourism in Bathurst Harbour**

Members of this attitude cluster felt it was challenging to develop economically viable tourism in Bathurst Harbour because of the weather conditions and difficulty getting equipment there. But tourism or visitation is also increasing. Despite this, Immersive Planners believed Bathurst Harbour offers an experience characterised by remoteness, beautiful scenery and landscape, low tourism numbers and needs to be sustainable/environmentally friendly.
Immersive Planners had, like Immersive Engagers, a strong desire to retaining the existing type of remote experience. They endorsed a tourist experience that is focused on enjoying the natural environment but in a visually non-intrusive manner, such as tent platforms, in order to minimise aesthetic and environmental impacts. They were concerned about the scale of tourism in the area — a sense of solitude and remoteness is central to the tourism experience. There was also a suggestion that publically managed accommodation was preferable to private facilities.

[Operators 50] ‘...it would change people’s desire to go to the region if it was developed. It should be difficult to get there.’

[Operator #40] ‘...the scarring to put a road in would be horrendous...accessibility is difficult and at times sporadic.’

**Immersive Planners’ preferred form of tourism development: Q sort**

The defining photographs that characterise this group included: the lone kayaker; an undeveloped track; and a photo of glamping (see Q sort below).

**Photographs that Immersive Planners ‘Liked’**
Analysis of this attitude cluster indicated their presence for infrastructure to be used to minimise impact on the environment, provided it was not to be visually intrusive. There was also a suggestion that publically managed accommodation was preferable to private facilities. The visitor experience is one of enjoying the environment without harming it.

**Immersive Planners’ attitudes towards the statistically significant photographs included:**

**Photo of an Undeveloped Track**

[Operator #24] ‘...minimal tracks are good because they keep people on track.’

[Operator #40] ‘...it gives sense of immersing in the environment.’

**Photo of Lone Kayak**

[Operator #50] ‘...it’s a way of seeing things without disturbing things.’

[Operator #68] ‘...it’s the simplicity...away from it all, non–motorised, back to basics.’

**Photo of Glamping:**

[Operator #28] ‘...it’s nice to have subtle types of accommodation for bushwalkers.’

[Regulator #41] ‘...think the Council and Parks and wildlife would prefer something like that....but I know that if going to get more people then it’s going to be difficult to protect the environment.’

**The forms of tourism development that Immersive Planners ‘disliked’**

The photographs that Immersive Planners disliked were described as undesirable because they were of a scale and style of tourism development that was deemed undesirable. Specifically, the photos were of: several resorts; an extensive resort with a pool; and caravans parked near the water edge.

**Photographs that defined what Immersive Planners did not want in terms of Tourism Development in Bathurst Harbour**
Examples of their explanation of their dislikes about certain types of tourism development depicted through the photographs included:

**Photo of Several Resorts:**

[Member of a Community Group #95] ‘... That is totally inappropriate for this environment.’

**Photo of Extensive Resort with Pool:**

[Operator #50] ‘... people are not walking to these locations, they are getting there by other means, and need infrastructure to support.’

[Operator #68] ‘... that is a complete blot on the landscape.’

**Photo of Caravans:**

[Operator #40] ‘... obviously you're going to need a car to get there, so will mean roads ... there will be infrastructure and waste management issues

[Operator #68] ‘... destroys the place – the quietness and environmental damage.’

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**Attitude Clusters of Tasmanian-based stakeholders within Bathurst Harbour**

**Immersive Engagers**

The Immersive Engager wanted tourism (numbers and type) to be controlled to ensure minimal environmental impact and retainment of the existing tourist experience of remoteness. They believed that tourism at Bathurst Harbour should involve activities where the participant is immersed in the natural environment, and the experience of remoteness is central. Natural tracks and independent experiences were what this group felt should characterise the visitor experience. They believed access to the area needs to continue via boat or plane or foot, and that numbers may need to be restricted.

**Immersive Planners**

The Immersive Planners endorsed a tourist experience that was focused on enjoying the natural environment but in a way that has minimal impact on the environment. To this end, they endorsed the use of visually non-intrusive infrastructure, such as tent platforms, to minimise impact on the environment. They were concerned about the scale of tourism in the area – they believed a sense of solitude and remoteness is central to the tourism experience.
4.5 Phase 2: Assessment of tourists’ preferences for tourism development

The objective of the second stage or phase was to test tourists’ preferences for tourism development in the Bathurst Harbour region. Following our factor analysis, that was conducted following the Q method process in Phase 1, we developed two tourism development options for Bathurst Harbour, that were based on the defining photographs of each Attitude Cluster. These scenarios were tested with 17 tourists from the Bathurst Harbour via a survey, which also contained demographic and attitudinal questions. This allowed us to assess the tourists against the segments that are regarded by Tourism Tasmania as their target markets (discussed in Chapter 6).

This process of surveying tourists in Bathurst Harbour was difficult as it required surveys to be flown into the region in late March. Yearly visitor numbers to the region are very low (it is estimated that only 8000 visit per year), that explains the low response rates. The surveys were disseminated to domestic tourists by volunteers in Melaleuca who were working for Parks Tasmania. Some were clearly completed by the Parks volunteer on behalf of the tourists. This created potential problems of bias and inconsistency of this region compared to the two other regions.

4.5.1 Tourists’ preferences for attitude clusters

Tourists ranked the three options for tourism development in Bathurst Harbour. These options included the ‘liked’ photographs from each of the Attitude Clusters, (see images below).

Development Option 1 – Derived from the ‘Immersive Engager’ Attitude Cluster

Development Option 2 – Derived from the ‘Immersive Planners’ Attitude Cluster

The Bathurst Harbour data set was much smaller so result should be viewed with caution. The results indicated that there was an equal preference for both options, with Option 1 receiving seven firsts and eight second places, and Option 2 receiving eight first and six second preferences. This is not surprising as the two sets of development options were very similar.

Those that ranked Option 1 first provided some reasons such as ‘Certainly not any resorts’ and ‘A model that controls impact. This may look more developed, however controls impact to define areas’.
While those that ranked Option 2 highest provided further elaboration such as ‘More boardwalking tracks’ and ‘Small group tour operators; well-maintained and signposted trails — this encourages self-sufficient tourists’ and ‘No big developments here. Just improve local walking tracks’.

Importantly there were a few respondents at Bathurst Harbour that did not answer this question and their responses were very clearly that they wanted no development, for example, ‘Leave area as it is’ and ‘Wilderness and as few people as possible’.

4.5.2 Tourists’ preferences for tourism development in Bathurst Harbour

Despite a strong desire for minimal impact forms of tourism development in Bathurst Harbour, most tourist respondents suggested they would like about the same or more tourists to the region (Figure 11).

![Tourists' Preferences for Number of Tourists to Bathurst Harbour](image)

**Figure 11  Tourists’ Preferences for Number of Tourists to the Region**

Of interest to this study is that those tourists who preferred different clusters had preferences for different number of tourists. The tourists that ranked Immersive Engagers preferred the same number of tourists to visit the region, while those tourists who aligned with Immersive Developers would like to see more tourists visit the area (see Table 14).
Table 14  Tourists’ preference for attitude cluster by the number of tourists they would like at Bathurst Harbour

<table>
<thead>
<tr>
<th>Number of tourists</th>
<th>Immersive Engager Preferred</th>
<th>Immersive Developers Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>About the same</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>More</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

4.5.3  Tourists’ visitation characteristics

As expected the majority of visitors were from Victoria (6), followed by New South Wales (4) with Queensland (3) and South Australia (3) sharing equal proportions (Figure 12).

Origin of Interstate Visitors to the Bathurst Harbour Region.

The age of tourists to the Bathurst Harbour ranged from 21 to 61 plus years. There was a relatively even spread across the age categories with 3 or 4 respondents in each decadal age group (that is, 21–30, 31–40, 41–50, 51–60) and only two respondents over the age of 61.

Tourism Tasmania has identified their target market for future tourism marketing and growth based on tourist visitation preferences. Specifically they are after tourists that are interested in partaking in any of: nature–based tourism; history and culture; fine wine and food; and arts activities. As we can see from Table 14, tourists to Bathurst Harbour are very interested or only
interested in nature–based tourism locations, with many of the tourists also very interested in history, arts and culture (Table 15).

<table>
<thead>
<tr>
<th>Table 15</th>
<th>Count of Preferences of Bathurst Harbour tourists to visit specific tourist activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not at all Interested</td>
</tr>
<tr>
<td>Nature–Based Locations</td>
<td>0</td>
</tr>
<tr>
<td>History and Cultural Sites</td>
<td>0</td>
</tr>
<tr>
<td>Visit Fine Wine and Food</td>
<td>12.5%</td>
</tr>
<tr>
<td>Arts and Cultural Locations</td>
<td>13%</td>
</tr>
</tbody>
</table>
4.6 Summary

This chapter outlined the two phases of data collection, for the Bathurst Harbour region of Tasmania. Phase 1 involved interviews of Tasmanian stakeholders who completed an interview. The stakeholder groups for this study were identified as including tourism operators, those in regulatory positions related to tourism and member of community groups or non–governmental organisations. There were few locals as the region is devoid of towns, with the exception of a small tin mining settlement in Melaleuca. The interview involved a photographic Q sort, where participants ranked their preferences for tourism development in their region. Using statistical analysis, combined with textual analysis were able to decipher two attitude clusters based on stakeholders’ preferences for tourism development. However, attitude clusters were very closely aligned, with only subtle differences in their attitudes towards sustainable tourism development. These were:

- Immersive Engagers, who wanted tourism (numbers and type) to be controlled to ensure minimal environmental impact and retainment of the existing tourist experience of remoteness. They believed access to the area needs to continue via boat or plane or foot, and that numbers may need to be restricted.

- Immersive Planners endorsed a tourist experience that was focused on enjoying the natural environment but in a way that has minimal impact on the environment. To this end, they endorsed the use of visually non–intrusive infrastructure, such as tent platforms, to minimise impact on the environment.

Phase 2 of the research involved the testing of these preferences against tourists in the region. Difficult access and very low visitor numbers, plus a reliance on volunteers made this process difficult and as a result, the response rates were very low.

Respondents were evenly split in their preferences for the two attitude clusters. Interestingly, the tourists that ranked Immersive Engagers preferred the same number of tourists to visit the region, while those tourists who aligned with Immersive Developers wanted more tourists in the region.
CHAPTER 5
Bay of Fires

Chapter 5 outlines the two phases of data collection that occurred in the Bay of Fires region of Tasmania. Phase 1 involved interviews of Tasmanian stakeholders who completed a photographic Q sort and ranked their preferences for tourism development in their region. Participants were also asked to answer a series of open and closed questions pertaining to their attitudes towards the region and tourism development within it.

This chapter also describes Phase 2, where tourists ranked tourism scenarios that were developed from the results of Phase 1. This second phase sought to decipher what type of tourism visitors to Tasmania preferred.

Finally, the chapter outlines the specific issues regarding tourism development that emerged from the Bay of Fires case study.

5.1 Introduction

The research method for the Bay of Fires case study area followed the procedures explained in Chapter 2. During Phase 1, we interviewed 43 local stakeholders, including tourism operators (9), those in regulatory positions related to tourism (5), members of non–governmental organisations (2), and locals (27). Each individual was interviewed in relation to their views on the Bay of Fires region following the interview guides found in Appendix B. Questions explored their opinions on: what the region means to them; their opinions on the amount and nature of existing tourism in the region; their attachment to the place in terms of livelihood and strength of attachment; demographic questions; and involved a Q sort process. The latter required participants to sort 32 photographs, that were selected to illustrate differing levels of sustainable tourism development (described in Chapter 3). The photographs included different levels of transport; tourism activities; built infrastructure such as track and roads; crowding; accommodation and supporting infrastructure. We taped and transcribed the interviews. Using factor analysis to assess the Q sort in Phase 1, we were able to elicit three attitude clusters for the Bay of Fires.

During Phase 2, we tested 65 domestic tourists’ preferences for these three photographic scenarios via a self–completed survey.

5.2 Background to Bay of Fires

The Bay of Fires was named after Captain Tobias Furneaux who, in 1773, noticed numerous fires along the coast, leading him to believe that the country was densely populated. The name continues to remind contemporary populations of a long cultural history of this area.

The region is a broad arc of coastline comprising mostly sandy beaches with low relief and occasional rocky outcrops, spanning 28.5 kilometres from Binalong Bay in the south to Eddystone Point in the north. The northern part of the Bay of Fires, from Ansons Bay to Eddystone Point, is in the Mount William National Park.
Most of the region is located in the Flinders bioregion, comprising dry coastal and lowland environments. The region is also part of the Ben Lomond bioregion, that is inland and generally wetter and more elevated and extends eastward as far as Mount Pearson. The regions diverse range of environments is likely to be important for evolutionary processes and climate change refugia (Fitzgerald 2009). It also hosts numerous threatened species of flora and fauna, as evidenced by a proposal in 2009 to extend the land under conservation and increase protection to National Park status (Fitzgerald 2009).

The Bay of Fires region is comprised of numerous types of land tenure, including private land or crown land. There are also various levels of environmental protection, including the Bay of Fires Conservation Area, which has three distinct zones:

1. The northern section of the Bay, from north of the outlet of Ansons Bay to Eddystone Point lies within the Mt William National Park. This section can be accessed from the Eddystone Road, just before the Lighthouse. Foot access only to Abbotsbury Beach is a 15 minute walk over the sand dunes to the beach.

2. The middle section that lies in the vicinity of Ansons Bay. It can be accessed via Policemans Point, which is within the Bay of Fires Conservation Area, or the northern shore of Ansons Bay. There are no shops or other facilities in this area.

3. The southern section is situated along a 13 km stretch of coast between Binalong Bay and The Gardens. This section provides for numerous caravan and tent camping sites, with relatively easy road access to facilities in Binalong Bay, and St Helens. The sealed road ends at The Gardens.

Bay of Fires Region
(shaded areas are national park)
As the name suggests, this area is rich with evidence of indigenous people's lifestyle, where the Bay of Fires area was a meeting place of the Larapuna family groups (Goldsworthy 2012). Embedded in the sand dunes are Aboriginal middens (shell and bone deposits) that are protected and should not be disturbed.

Following the settlement of Launceston in March 1806, the surrounding regions were infiltrated and soon the coastal fishing village of St Helens was established.

‘What was originally was a sheep farm, later became known as Bathurst Harbour, and was subsequently renamed Binalong Bay. Thus, ‘the bay’ was set to develop initially as a small fishing village and then eventually into one of the Tasmania’s and now the World’s premier holiday destinations.’ (Goldsworthy 2012: 8).

The Bay primarily served as a harbour for the transport of sheep, locally caught fish, and timber. A railway ended the small Binalong Bay harbour and you can still see the large concrete and stone sea wall from where timber and stock were loaded onto ships for transport to Launceston, Hobart or Melbourne (Goldsworthy 2012).

The development of Binalong Bay and Bay of Fires as a holiday destination seems to have occurred post 1950, as at this stage there was only ten to twenty small wooden shacks providing accommodation/residences.

There are now approximately 200 shacks/dwellings within the Bay of fires — 100 permanent residences and 100 holiday residences/ tourist accommodation (Tasmania Parks and Wildlife Service 2014). Other than the small community of Binalong Bay, that provides a café and fire station,
there are no other services, although St Helens serves as a regional hub and is situated only 11 kms south of Binalong Bay.

A wide range of activities are able to be pursued in the Bay of Fires area, including camping, beach activities, boating, bird watching, fishing, swimming, surfing, SCUBA diving and walking (Tasmania Parks and Wildlife Service 2014).

**Campsite near the Gardens, Bay of Fires**

### 5.3 The research experience

During the planning phase, the research team ensured that information sheets were sent to local councils and regional tourism bodies. Several media releases were also disseminated in a variety of local and state media outlets, to ensure that there was a high level of awareness of the research.

As part of the research process, we defined the local community associated with the Bay of Fires to be residents of Binalong Bay, and St Helens. Interviews of operators, regulators and community members occurred through a process of email and phone calls to tourism operators, regulators and representatives of community groups. Our research was received with far greater enthusiasm than in the Tarkine; response rates were higher and we did not experience antagonism such as we did in the Tarkine.
5.4  Phase 1: Results of the stakeholder Q sort

5.4.1  Tasmanian attitude clusters

Analysis of the interviews occurred combining two approaches: first through a Q method (factor analysis) as described in Chapter 2, and second through a qualitative analysis of the responses to the open-ended questions. We identified three attitude clusters for the Bay of Fires region made up of stakeholders who had similar attitudes towards tourism development.

5.4.2  Principles underpinning the development of the attitude clusters

Our Attitude Clusters have been developed to tell an image driven story that represents the defining features of each category, in terms of their preferred tourism development preferences for each case study region. Consequently, they are derived from photographs that were statistically significant and also ‘defining’ photographs that assist in the description of the Attitude Clusters’ attributes.

5.4.3  Attitude Cluster 1: Engagers with Nature

This attitude cluster had stakeholders from each of the stakeholder groups within it, noting that all community representatives and most of the local representatives who were interviewed fell into this cluster (Table 16).

<table>
<thead>
<tr>
<th></th>
<th>Engagers with Nature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>5</td>
</tr>
<tr>
<td>Regulators</td>
<td>2</td>
</tr>
<tr>
<td>Community</td>
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</tr>
<tr>
<td>Locals</td>
<td>18</td>
</tr>
<tr>
<td>Total</td>
<td>27</td>
</tr>
</tbody>
</table>

Engagers with Nature attitudes towards the Bay of Fire

When asked what word best describes the Bay of Fires area, Engagers with Nature described it as characterised by its spectacular natural environment, particularly the white sands, turquoise water and orange lichen covered rocks, and almost pristine. It is relatively undeveloped and so when visiting one can experience a sense of isolation and peacefulness, even seeing more wildlife than people. It is a place with a strong Indigenous history.

Its strengths in terms of tourism is its accessibility and potential for increased tourism. However, it is also has potential to be harmed by tourism/development.
Engagers with Nature attitudes towards tourism in the Bay of Fires

Engagers with Nature hold two distinct perspectives regarding tourism in the Bay of Fires. The first perspective supports more tourism and requests more development (of particular kinds) but also holds the view that the Bay of Fires has some tourism strengths in that it is accessible and has the potential for more, but it also has great potential to be harmed by tourism and development.

A few Engagers with Nature disliked tourism and think there is enough. Both perspectives of tourism focus on the natural values of the area and there is agreement that these need protection, and that there should be control mechanisms of tourism and/or tourists. Within this group, the majority of locals interviewed thought there should not be an increase in tourism; all other stakeholder categories thought that there was potential for tourism to increase (Figure 13).

![Figure 13: Preferences for number of tourists in the Bay of Fires](image)

Engagers with Nature had specific ideas of how tourism should be supported in the Bay of Fires. They requested additional promotion of the area, additional infrastructure to accommodate tourists (including activities and information), and supported Indigenous cultural heritage options. Interestingly they were critical of the free camping that occurs arguing that these visitors bring relatively little money to the area, and results in considerable litter and damage. They were also critical of local tourists who can dominate space (camping and accommodation) not leaving enough facilities for interstate and international visitors as visiting ‘Locals’ don’t spend much money in the area.

[Operator #28] ‘...tourism can be further enhanced with extra facilities and things to do, basically that’s it. We haven’t really got enough facilities, even in accommodation and restaurants et cetera, so the infrastructure really needs to grow to get more tourists.’

Page | 87
Operator #23: ‘...people want to see (an) untouched area and the experience.’

Operator #23: ‘...In summer very crowded (Bay of Fires) because of the not passing through visitors. Tasmanian’s inapt behaviour, tourists can’t get a look at it. Summer tourism is a problem. Access to area is blocked off, yet go up three beaches and it’s remote, fresh air, not far away, easy access, not promoted and consider it more remote than north–west. Tasmanians are up for many weeks, even with tyres on rocks. With the things to do there should be a small fee ($5) to use it.’

Community #11: ‘... when I think of tourism in the Bay of Fires area I think that it is missing the possibility of deep cultural interpretation.’

Community #47: ‘... danger of imposing tourism without a sense of place, permanent damage, inappropriate infrastructure, not reorganised where you put too much into the region before you destroy the features people come to see.’

Regulator #30: ‘...I think ...unless we have some sort of serviced facilities along there, there is a risk the environment will be spoilt by uncontrolled camping. I guess what I’m saying with that, I’m not opposed to free camping, it plays an important role in our visitor industry but we do need some kind of control over it particularly in an place as pristine and ...I mean the last thing we want to do is ruin it, ruin the beauty by bringing people there in an uncontrolled manner.’

Local #58: ‘...dislike locals, they book out so tourists can’t get in there, poor signage, doesn’t point to the right spot, worldwide recognition, need to keep it pristine.’

Local #61: ‘...like the people that visit the region, really friendly, look after the place so no rubbish at campsites and leaving it spotless.’

Local #65: ‘...Why don’t they build an aboriginal interpretation centre to provide historical perspective?’

Engagers with Nature’s preferred form of tourism development: Q sort

The defining photographs that characterise Engagers with Natures’ preferences included: a photograph of an undeveloped track, guided bushwalk, and two people in a single kayak (see images below).
These images reflect the preferred tourism experience type and scale of tourism in the Bay of Fires, so while there was a difference of opinion as to how much tourism the Bay of Fires should have, there was agreement on the type of tourism that it should be.

The Engagers with Nature felt that tourism should focus on relatively pristine natural features. Any tourist activity or development should reflect this approach to tourism. This group wanted activities that engaged with nature, were low impact, provided a tranquil experience and that would be appreciative of nature. They felt there was a need to increase the tourism opportunities for the free independent market (That is, non–bus tour market) in the region, but without it becoming a ‘mass tourism’ destination.

Engagers with Nature’s attitudes towards the statistically significant photographs were represented by the following quotes:

**Photo of Undeveloped Track**

[Local #70] ‘...natural, wilderness as its best, natural form.’

[Community #11] ‘...to me (it’s about) minimal impact on the environment... it’s about... I’d prefer the natural pathway rather than actually constructed pathway. People walking through like that have minimal impact on the environment.’

[Operator #12] ‘...doesn’t depict much activity.’

[Regulator #29] ‘...is a secluded track.’

**Photo of Guided Bushwalk**

[Operator #12] ‘...it’s what I do, they are learning about the region enhancing the experience.’

[Community #47] ‘...interpretation with guide is paid and creates employment.’

[Regulator #29] ‘...got people wanting to enjoy the place just walking impact and with someone who can tell them all about it. They go home really informed about the area they have walked through, as oppose to doing it themselves.’
[Local #65] ‘...gives someone a job, touring around educating people.’
[Local #75] ‘...education of tourist is important and control.’

Photo of Glamping

[Local #56] ‘...little bit of wilderness.’
[Local #59] ‘...controlled infrastructure.’
[Local #60] ‘...awareness of fragility.’
[Local #61] ‘...basic, low impact, doesn’t make themselves the centre of attention.’
[Local #65] ‘...if you provide shelter people will use and stay longer.’
[Operator #12] ‘...I know these sort of ones (camps) are just take it down and there’s not really much trace left after a few years and (their impact) disappears into the bush.’
[Regulator #29] ‘...and to some degree the eco–looking lodge, provides interpretation of the area and makes people better informed. ... they’re built so their impact on the landscape is minimal.’
[Community #11] ‘...its impact on the environment is minimal and fits with the aesthetics of the location.’

Forms of tourism development that Engagers with Nature ‘disliked’

Analysis of this attitude cluster also revealed the photographs that Engagers with Nature disliked, along with their reasoning. These included a photograph of several high rise resorts, an extensive resort with swimming pool, and several quad bikes (see images below).

The selection of these images and comments made by respondents suggest that the natural untouched environment is what people come to visit; infrastructure, accommodation and activity should be consistent with those values. The large–scale of the accommodation and likely costs were seen as inappropriate for the Bay of Fires area. High impact and noisy activities were also not viewed as sympathetic/appropriate to the tourism and local goals. Respondents thought that inappropriate activities and developments should be located in other regions.

Photographs that defined what Engagers with Nature do not want in terms of Tourism Development in the Bay of Fires
5.4.4 **Attitude Cluster 2: Environmental Accommodators**

This attitude clusters’ had respondents from the three stakeholder categories: operators, regulators and locals. There were relatively few locals that fell into this category and no community members emerged in this group, but only two community members were interviewed for the Bay of Fires case study area (Table 17).

<table>
<thead>
<tr>
<th></th>
<th>Environmental Accommodators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
<td>4</td>
</tr>
<tr>
<td>Regulators</td>
<td>3</td>
</tr>
<tr>
<td>Community</td>
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</tr>
<tr>
<td>Locals</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>12</td>
</tr>
</tbody>
</table>

**Environmental Accommodators’ attitudes towards the Bay of Fires**

Environmental Accommodators characterised the Bay of Fires by its unspoilt natural beauty and sense of remoteness. These people valued the diversity of activities that focus on engaging with and appreciating this environment (fishing was the only consumptive activity mentioned). They recognised and valued it as a place of important Indigenous cultural heritage, and a place that provides a lifestyle with strong natural links.

**Environmental Accommodators’ attitudes towards Tourism in the Bay of Fires**

The Environmental Accommodators were generally supportive of tourism in the Bay of Fires but all thought that it should be low impact and sustainable, and while there is the potential for tourism to expand care needs to be taken not to destroy what attracts visitors. They believed that tourism must be developed in a way that reflects respect for the values of the area. They advocated tourism that focuses on the unique and unspoilt natural features, having received responses from visitors that the place is ‘breathtaking’.

There were differing opinions regarding the way that tourism should be developed, and how the places should be used and managed. Many felt that tourism was limited by a lack of visitor awareness, lack of visitor facilities, inaccessibility and over regulation. There was a clear recognition of the differing perspectives.

No members of this group advocated less tourism, although two respondents suggested that tourist numbers should stay the same (Figure 14).
Preferences for Number of Tourists in the Bay of Fires

![Bar chart showing preferences for number of tourists in the Bay of Fires.]

**Figure 14** Preferences for number of tourists in the Bay of Fires

Environmental Accommodators’ views were exemplified in the following quotes:

[Operator #43] ‘... (tourism requires) respect for the area and its values of course. I think you need to be aware of your role as a custodian, you can’t take the place for granted.’

[Regulator #46] ‘...I think the inaccessibility is an impediment, the lack of infrastructure I suppose, by the same token ...care needs to be taken that (tourism) doesn’t impact on those beneficial factors.’

[Local #73] ‘...it’s a great place to visit, a special part of Tasmania, needs to be left as it was found. It’s a major tourism attraction for interstate visitors.’

[Regulator #44] ‘... (tourism is) contentious because there are differing opinions ... about the way in which these sites or the way the area should be used, and also varying opinions on its future use and ownership and presentation. A lot of conflicting components to this coastline.’

**Environmental accommodators Preferred form of Tourism Development: Q sort**

The defining photographs that characterise Environmental accommodators’ preferences included a photograph of eco–lodge style accommodation, an example of glamping, and a number of timber cabins nestled in bush (see images below).
Photographs that Environmental Accommodators ‘Liked’

These images reflect the preferred tourism experience type and scale of tourism in the Bay of Fires, characterised by different forms of tourism accommodation. Similar to the Engagers with Nature, while there was a difference of opinion as to how much tourism the Bay of Fires should have, there was agreement on the type of tourism that it should be, but for this group ‘tourism’ is represented by accommodation rather than activity.

Environmental Accommodators wanted a spectrum of accommodation that is environmentally sensitive or minimal impact, and visually blends with the existing environment. They wanted accommodation and activities that promote and provide access to the natural values of the area in a way that minimises harm to the environment and experience, but they also wanted to make those opportunities accessible to spectrum of people. They were very clear that it was the natural values of the Bay of Fires that made it special as a landscape and natural environment and attracts visitors.

Environmental Accommodators’ attitudes towards the statistically significant photographs are represented by the following quotes:

Photo of Eco-lodge Style Accommodation

[Operator #25] ‘...I think it is a quality development done well. Its low impact, blends into the landscape and seems lower than the trees and all that sort of thing, rather than the fifteen storey high-rise hotel.’

[Regulator #51] ‘...provides a hub for all other activities.’

[Local #73] ‘... need to bring people who are going to leave money in the area.’

Photo of Glamping Accommodation

[Operator #25] ‘...I don’t want it (tourism) to be for the people with lots of money. You can have your high-end stuff but still make it accessible for people who want more budget options. Permanent tents are quite good for that.’

[Operator #43] ‘...is a standing camp and ... (provides) the opportunity to experience the wilderness without the forgoing the comfort that is important to (tourists). Also, clearly structures like this
are low impact. You can remove that from places relatively untouched.’

[Regulator #46] ‘...with the eco-lodge it is catering for either end of the market.’

Photo of Timber Cabins Nestled in Bush

[Operator #31] ‘...because of what my clients (want) ... That’s what they’re after when they come here, they’re not coming here because they want a resort like Queensland, they’re wanting a beautiful environment but also want things to do.’

[Regulator #44] ‘...These provide for a suite of opportunities to people who aren’t high end or in the market for a guided standing camp experience to have access to the site (Bay of Fires) and provides a suite of opportunities in accommodation, whether they are tent, caravan or cabins.’

[Operator #25] ‘...the little cottages up on the hill, think there are ones like that up there and I can see that they’re made (with) natural colours, brown with green roofs and things so it blends in ... there are not ten more just like it all around them. The landscape is still dominated by natural things rather than man made stuff.’

Forms of tourism development that Environmental Accommodators ‘disliked’

Analysis of this attitude cluster also revealed the photographs that Environmental Accommodators disliked, along with their reasoning. These included: a photograph of several high rise resorts, an extensive resort with swimming pool, and a colonial style heritage building (see images below).

The selection of these images and comments suggests that they dislike large-scale resort style developments that dominate the Bay of Fires natural character, and they were concerned that these styles of development would lead to an overly commercial type of tourism not currently found. They were concerned about the environmental impact and visual impacts that would occur with developments such as these. There were different interpretation of the heritage building and the comments suggest a focus on the natural elements of the Bay of Fires. There was acknowledgement that that cultural heritage values did exist at Eddystone Lighthouse and agreement that it should be preserved (see images below).
5.4.5 **Attitude Cluster 3: Outdoor Recreationists**

This attitude cluster, that was very small, had respondents from local stakeholders only (Table 18). Therefore this is the only factor that aligns with a single stakeholders group, however, there were locals are in the other factors, it did not represent the breadth of locals’ attitudes.

<table>
<thead>
<tr>
<th>Count of respondent categories in Outdoor recreationists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operators</td>
</tr>
<tr>
<td>Regulators</td>
</tr>
<tr>
<td>Community</td>
</tr>
<tr>
<td>Locals</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

**Outdoor recreationists’ attitudes towards the Bay of Fires**

Outdoor Recreationists held a consistent view of the Bay of Fires as a relatively untouched natural area of beauty, offering opportunities for relaxation and activities such as fishing, walking, and picnics.

**Outdoor Recreationists’ attitudes towards Tourism in the Bay of Fires**

The Outdoor Recreationists felt that there was a need for better facilitation of tourism: more information, more promotion and more encouragement of activity development.

All members of this group, in contrast to the Environmental Accommodators and Engagers with Nature, provided a uniform response that Bay of Fires should have more tourists (Figure 15).
The Outdoor Recreationists’ views are exemplified in the following quotes:

[Local #63] ‘...driving/walking and enjoying it. People need more information about the area so they can engage with it, for example, walking along Binalong Bay sand with bare feet.’

[Local #72] ‘...underutilised, not enough options for tourism.’

Outdoor recreationists preferred form of tourism development: Q sort

The defining photographs that characterise Outdoor Recreationists’ preferences focused on outdoor activities; they included a photograph of a man fishing, several horse–riders, and several quad bikes (see images below).

Photographs that Outdoor Recreationists ‘Liked’
Outdoor Recreationists’ preferred form of tourism was characterised by outdoor activities accessible to all, and that would encourage use of the area. Outdoor Recreationists were concerned about the impact on the environment and seemed to be using current activity types and levels as a benchmark for appropriate activity. Their choice of activities though, was relatively high impact and may have reflected a strong personal preference for the activity or unfamiliarity with the level of impact of these activities.

Greater detail and understanding regarding their preferences for tourism in the Bay of Fires can be found in the following quotes:

**Photo of Fishing**

[Local #72] ‘...reasonably low impact but still encouraging usage.’

[Local #57] ‘... (I am a) keen fisherman.’

**Photo of Several Horse–Riders**

[Local #77] ‘... these activities are already happening, (they) just need to be advertised as this attracts tourists (but also added regarding the lone horse rider on beach: could bring tourists but needs to be environmentally sound).’

[Local #57] ‘... have gone horse riding and everyone can do it.’

[Local #72] ‘... could happen in the bush, great spot at Police Point and The Gardens for horse riding.’

**Photo of Several Quad Bikes**

[Local #57] ‘... (I am a) motor head and like these activities.’

[Local #77] ‘... these activities are already happening, (they) just need to be advertised as this attracts tourists.’

**Forms of tourism development that Outdoor Recreationists ‘disliked’**

Analysis of this attitude cluster also revealed the photographs that the Outdoor recreationists disliked, along with their reasoning. These included: a photograph of several high rise resorts, an extensive resort with swimming pool and an eco–looking lodge (see images below).
Analysis of the Outdoor Recreationists’ comments demonstrated a concern about the density of the accommodation options and preference for small accommodation options. They believed that larger scale accommodation conflicted with the natural beauty of the landscape, was not needed, impacted negatively on the environment, and was inappropriate for a protected area. They also saw the natural environment/heritage as having more relevance to tourism than cultural heritage.

There appeared to be a contradiction between what members of this group liked and disliked. For example, their likes, such as quad biking, are often considered environmentally destructive, yet members of this group stated that they did not want to impact negatively on the environment. They were very clear that the Bay of Fires should be small-scale tourism, and saw the scale of tourism and visual impact as the most harmful aspects (see images below).

Photographs that defined what Outdoor Recreationists do not want in terms of Tourism Development in the Bay of Fires

5.5 Phase 2: Assessment of tourists’ preferences for tourism development

The objective of the second stage or phase was to test tourists’ preferences for tourism development in the Bay of Fires. Following our factor analysis of the Q sort results in Phase 1, we developed three tourism development options for the Bay of Fires, that were based on the defining photographs of each Attitude Cluster. These scenarios were tested with 65 tourists from the Bay of Fires via a survey that also contained demographic and attitudinal questions (see Chapter 2 for further detail of method). This allowed us to assess the tourists against the segments that are regarded by Tourism Tasmania as their ‘target markets’ (discussed in Chapter 6).

The surveys were self-administered and were given to domestic tourists at the Binalong Bay lookout or at the Cosy Corner Campsite, within the Bay of Fires Conservation area.
5.5.1 Tourists’ preferences for attitude clusters

Tourists were asked to rank three options for tourism development in the Bay of Fires. The options were determined by the first phase of stakeholder engagement and consisted of the ‘liked’ photographs from each of the Attitude Clusters, (see images below).

**Attitude Clusters of Tasmanian Based Stakeholders within the Bay of Fires**

**Engagers with Nature**
Engagers with Nature value the Bay of Fires area for its spectacular natural environment, particularly the white sands, turquoise water and orange lichen covered rocks, and almost pristine. Tourism in this area provides an experience characterised by a sense of isolation and peacefulness, sometimes seeing more wildlife than people. It is a place with a strong Indigenous history. Engagers with Nature differed as to whether tourism should increase, stay the same or decrease. They are the only attitude cluster for the Bay of Fires that included some individuals who had a request for less tourism. There was agreement though that the natural values should be protected, and that there should be control mechanisms of tourism and/or tourists. Large-scale tourism accommodation was seen as inappropriate aesthetically, environmentally and prohibiting visitor access.

**Environmental Accommodators**
Environmental Accommodators value the Bay of Fires’ unspoilt natural beauty and sense of remoteness. They were generally supportive of tourism in the Bay of Fires. Environmental Accommodators want a spectrum of accommodation – all of which is environmentally sensitive or minimal impact, and visually blends with the existing environment. They want accommodation and activities that promote and provide access to the natural values of the area in a way that minimises harm to the environment and experience, but they also want to make those opportunities accessible to a spectrum of people. They were very clear that it is the natural values of the Bay of Fires that makes it special as a landscape and natural environment and attracts visitors, although they recognised and valued the Indigenous cultural heritage of the area. There are differing opinions over how tourism should be developed, and how the places should be used and managed.

**Outdoor Recreationists**
Outdoor Recreationists value the Bay of Fires for its relatively untouched natural beauty offering opportunities for relaxation and activities such as fishing, walking, and picnics. They support an increase in tourism and feel that there needs to be better facilitation of tourism: more information, more promotion, and more encouragement of activity development. Their preferred tourism activities seemed based on activities of their own interest and whilst concerned about environmental impacts, their activities of choice have a relatively high environmental impact. They are very clear that Bay of Fires should be small-scale tourism particularly in terms of accommodation options, so possibly see the scale of tourism and visual impact as the most harmful aspects.
In the Bay of Fires, most tourists ranked Development Option 1 ‘Engagers with Nature’ (70%) first and a further 22% ranked it second in preference ranking. Option 2 ‘Environmental Accommodators’ was ranked second and third by 39% and 45% of people respectively. Following this, Option 3 ‘Outdoor Recreationalists’ was ranked second and third by 41% and 47% respectively (that is, 26 and 30 tourists) (Figure 16).
Some comments from those that ranked Option 1 first included:

‘Don’t interfere with nature, that is, no buildings et cetera. It is a lovely area’

‘Wheelchair access and viewing platforms, walkways where possible or at least an area that is visible from the car windows when confined to a wheelchair. Ferry should be 20% cheaper for tourists for example, cars go free, pay for caravans et cetera. Tourists provide Tasmania with an income.’

‘More of the spectacular beach scenery’

‘Free camps’

‘All resorts to be of sustainable design’

‘Sustainable eco-tourism with a ‘freedom’ angle, free camping is amazing and a big draw card. It needs to be kept available as it tempts visitors to visit and they then spend in the surrounding towns. We have spent over 300 dollars in Saint Helens as an example.’

Those that ranked Option 2 as their first preference showed a desire for more amenities, for example:

‘Just love the beautiful coastline. Leave it as it is. But maybe some more amenities’

‘more water’

‘sea kayaking, snorkelling’
Those that ranked Option 3 as their first preference indicated a desire for more vehicular infrastructure development, for example:

‘More caravan sites.’

‘Roads open to 4x4 clubs and enthusiasts to explore these areas if you have to register the drive.’

‘More caravan sites.’

5.5.2 Tourists’ preferences for tourism development

The preference for attitude clusters did not affect tourists’ response to how many other tourists they would like to see at the Bay of Fires. All clusters responded with about 70% stating that they want ‘about the same numbers’ reflecting the overall sample preference for number of tourists to the region (Figure 17).

Bay of Fire Tourists’ Preferences for Number of Tourists

![Bay of Fire Tourists' Preferences for Number of Tourists](image)

Figure 17 Bay of Fire tourists’ preferences for the number of tourists to the region
5.5.3 Tourists’ visitation characteristics

Not surprising given the location of Bay of Fires, the majority of tourists were traveling on holiday by car (80%) (Figure 18).

![Transport used while in Tasmania](image)

**Figure 18** Transport used while in Tasmania

What was surprising about the tourists in this region was the long holiday periods they were spending in Tasmania. Our survey revealed that the longest length of stay was 120 days, with an average of 46 days on holiday in Tasmania and a mode (most commonly occurring) of 60 days (5 tourists). This length of stay is contrary to the emergent trend in Tasmania for shorter stays. Another surprising finding was the large number of visitors from Queensland (30%), as shown in Figure 19. Apart from the high Queensland proportion, the other strong origin states were Victoria (30%) and New South Wales (24%) that were expected.
The Bay of Fires tourists were of an older age profile with 71% over the age of 50 (40% of respondents were over the age of 61) and only 15% of respondents were 40 years old or younger. These tourists were very interested in visiting nature–based locations and undertaking historical and cultural activities. In comparison, they had a lower interest in doing fine wine and food activities and visiting art and cultural locations (Table 19).

**Table 19  Tourist preferences for the types of activities to be undertaken in Tasmania**

<table>
<thead>
<tr>
<th></th>
<th>Not at all interested</th>
<th>Slightly Interested</th>
<th>I don't have an opinion</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Nature–Based Locations</strong></td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>73%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>History and Cultural Sites</strong></td>
<td>2%</td>
<td>13%</td>
<td>11%</td>
<td>65%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Visit Fine Wine and Food</strong></td>
<td>20%</td>
<td>26%</td>
<td>10%</td>
<td>39%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Arts and Cultural Locations</strong></td>
<td>16%</td>
<td>43%</td>
<td>13%</td>
<td>26%</td>
<td>2%</td>
</tr>
</tbody>
</table>
5.6 Summary

While there were clear differences in attitude towards tourism across the stakeholder groups (locals, community groups, operators, regulators, tourists) they all felt that the focus of tourism in the Bay of Fires area is, and should be, on its natural values.

Tourists’ preferences clearly aligned with the Engagers with Nature, indicating that they too, prefer the eco–specialist approach to tourism. All non–tourist stakeholders also felt that tourism should not be accessible only for ‘elite’ or wealthy visitors, but that there should be opportunities and access across a range of budgets and abilities. Each attitude cluster had different perspective on what tourism development should occur:

- **Engagers with Nature** — They requested additional promotion of the area, additional infrastructure to accommodate tourist (including activities and information), and supported Indigenous cultural heritage options. They were the only group to advocate less tourism, and were critical of ‘local’ tourists who did not spend much money and filled campsites preventing interstate or international tourists from staying.

- **Environmental Accommodators** — Many felt that tourism is limited by a lack of visitor awareness, lack of visitor facilities, inaccessibility and over regulation. There was a clear recognition of the differing perspectives on tourism in the region.

- **Outdoor Recreationists** — have a focus on outdoor activity and believe that there should be a spectrum of activities including horse riding, consumptive and mechanised activities as these popular with tourists, and also preferred activities of respondents.

All respondents wanted tourism to be economically sustainable and to involve activities and/or development that does not destroy the attraction. However, there was not a clear or consistent view of what constituted minimum environmental impact.

There was a consistent desire for small–scale tourism, evidenced by a dislike for the large–scale resorts. Small–scale tourism means ensuring opportunities for the independent and/or self–sufficient tourist; accommodation style that provides mostly individual and private accommodation, for example cabins or small homes; and a recommendation to retain St Helens as the key service area.

Interestingly only local respondents wanted less tourism (some also said more), and most tourists wanted the number of tourists to remain the same.

Tourists’ strongest preference was for environmental engager – reflected by their strong interest in nature–based tourism, but the majority (although not as many strongly interested) were also interested in cultural sites.
CHAPTER 6
Economic Analysis

In Chapter 6, we pull together the results from Chapters 3, 4 and 5, with new results around cumulative impacts of tourism development to address research questions two and three. This is the final results chapter and is uniquely structured to take a state wide, rather than regional perspective on the issue of tourism stakeholders understanding of and attitudes towards sustainable tourism development in sensitive areas. It achieves this by reporting stakeholder and tourist results on their preferences for the same style and type of development as identified in their region, and extending it out to the other two regions. It also extends the Q method by undertaking a secondary analysis to derive state–wide attitude clusters. Finally, it uses the information on cumulative preferences and the state–wide attitude clusters to deliver viable alternate development scenarios for Tasmanian tourist industry and extrapolates some possible economic implications.

Overall, there are three likely state–wide attitude clusters: Environmental Engagers, Outdoor Multi–Users and Environmental Pragmatists. These three clusters are the basis for alternate state–wide development scenarios, these scenarios differ in the number of tourists and amount of tourist infrastructure they desire. These three scenarios can have varying impacts on total direct tourism expenditure, which directly affects the Tasmanian Tourism economy.

6.1 Introduction

This chapter covers the final phase of the research, looking specifically at the social attitudes to cumulative impacts. Cumulative impacts are investigated in three ways, first data is presented on how likely the stakeholders and tourists were to apply the separate regional attitude cluster to the two other regions. Second, state–wide clusters or scenarios were developed following a second order analysis of the Q sort. These three development scenarios are discussed in respect to stakeholders and tourists. Finally, the state–wide scenarios are extrapolated onto known economic scenarios for tourism growth in Tasmania to identify any likely economic impacts.

This chapter directly answers two research questions

1. Do the attitudes of these stakeholder groups towards sustainable tourism development in single locations recognised for the presence of MNES differ to their attitudes towards sustainable tourism development in multiple locations recognised for the presence of MNES?
2. What are the likely economic impacts of sustainable tourism development on marginal rates of visitation for selected areas recognised for the presence of MNES in Tasmania?
6.2 Cumulative impacts

A great dearth in research is the lack of studies that assess the cumulative impacts that tourism development in multiple destinations may have on stakeholders' attitudes. Cumulative impacts have been characterised as ‘death by a thousand cuts’ or the ‘tyranny of small decisions’ and defined as: ‘the net result of environmental impact from a number of projects and activities’ (Cooper 2004: 2). Typical examples include: the effect of car emissions on the climate, the piecemeal loss of lowland heathland, and the loss of water resources from over abstraction. Cumulative effects are products of weaknesses in the planning and policy stages, and most frequently occur when there is: spatial crowding or temporal overlap between plans, proposals and actions; repeated removal or addition of resources due to proposals and actions; and repeated alteration of the landscape in the plan area (Cooper 2004). Without adequate planning tourism development may result in numerous kinds of cumulative changes, such as (Source: Cooper 2004: 3)

- Time crowding — frequent, repetitive and simultaneous impacts on an environmental resource
- Time lag — a long delay between cause and effect
- Space crowding — high spatial density of impacts on an environmental system,
- Cross–boundary movement — impacts occur some distance away from source
- Fragmentation — change in the landscape pattern
- Compounding/synergistic effects — effects resulting from multiple sources or impacts that may be different in nature from the individual impacts
- Indirect effects — secondary impacts resulting from a primary activity
- Triggers and thresholds — fundamental changes in system behaviour or structure
- Nibbling — incremental or decreasing effects

We investigated cumulative impacts throughout the study, asking specific questions in both the stakeholder interviews and the tourist survey.

6.3 Stakeholder cumulative impacts

During interviews, stakeholders were asked to discuss their preference for the different development clusters and how these could be aggregated, applied or considered cumulative across the other two case study areas. The specific questions asked were:

Would you support the same level and style of development in all three of these locations, and why? Do these three regions differ in any way?
Results from these cumulative questions clearly relate to the attitude cluster identified by the respondent (see Figure 20). Initial analysis identified that there was no clear differentiation between attitude cluster and their preference for cumulative development. For example, 45% of all respondents stated they would like to see the same level of development in all three regions, while 8% were unsure and 47% of respondents would like to see different development in different regions.

**Stakeholders Support for Development**

![Graph showing stakeholder support for development](image)

*Figure 20 Stakeholders support for the same level of development throughout the three regions, identified by their attitude cluster*

We investigated the preference for cumulative development by stakeholders to see if cross regional development was aligned to stakeholder groups. Results for each region Bathurst Harbour, Bay of Fires and Tarkine respectively (Figure 21, 22 and 23), are presented below. In each graph, the first column represents the number of stakeholders who like to see the same level of development across the three regions. For Bay of Fires and Tarkine this was about half of respondents (respectively 53% and 54%).
Support for Development from Bathurst Harbour Respondents

Figure 21  Support for the same level and style of development from Bathurst Harbour respondents in all three of these locations by respondent type.

Support for Development from Bay of Fires Respondents

Figure 22  Support for the same level and style of development from Bay of Fires respondents in all three locations by respondent type.
While Figure 20 identifies the stakeholder group preferences by region for cumulative development, we should state that there was a minor trend in the data around operator’s preferences and the other groups. In general, at least half the stakeholders (that is, community, local and regulators) expressed interest in the same level of development across all three sites. Operators showed a clear preference (that is, count of 11 versus a count of six) for differential development by region, explicitly around more development at Bay of Fires region.

Why half the respondents wanted to have the same type of development across the other regions was provided in their qualitative statements. The main theme emerging from the data around why the same level of development was desirable, was it seems that all respondents justified their choice on the grounds of either ‘sustainability/protection for all areas’

[Regulator #48] ‘…subject to consideration to sustainable, eco–friendly tourism to maintain the values each region holds.’

The reasons for expressing a difference in development across the three regions was clearly aligned to two issues. First was the current differential in development in the three places. There were a number of statements related to the need to align development in areas already more highly impacted.

[Operator #24] ‘…more development in Bay of Fires area, already commercial huts. Not much in Tarkine yet so Tarkine and Bathurst Harbour are more wilderness areas – some very subtle development ok – not big, prefer to see general public type accommodation, not private.’
The second main reason for stating a difference in preferences for development across the regions was due to a lack of knowledge about what the other regions were doing, and where their developmental interests lay.

[Local #51] ‘...haven’t been to the other locations, so can’t really comment.’

6.3.1 Tourists’ cumulative interests

Similar to the stakeholders, tourists were asked if they would like to see the same level of development (as expressed by their ranking of clusters) in the two other regions. As this question is again tied to the preferred attitude cluster, results by cluster are presented in Table 20 below.

<table>
<thead>
<tr>
<th>Attitude Cluster</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protectionists</td>
<td>16</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>Multi–Users</td>
<td>2</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Rugged Pragmatists</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engagers with Nature</td>
<td>19</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Environmental Accommodators</td>
<td>7</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Outdoor Recreationalists</td>
<td>2</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immersive Engagers</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immersive Planners</td>
<td>4</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>TOTAL</td>
<td>58</td>
<td>13</td>
<td>57</td>
</tr>
</tbody>
</table>

Initial results show that of those who responded, most clusters exhibited an almost even split between people that wanted the same type of development and those that were unsure. The exception to this was Bathurst Harbour where most tourists clearly wanted the same type of development across the three areas. Due to this regional anomaly we investigated whether tourists’ preferences for cumulative development were influenced by the region people were asked the question. The results are in Figure 24.
It seems clear that more tourists in the Tarkine did not want the same level of development across all three sites, while more tourists in the Bay of Fires and Bathurst Harbour wanted the same level of development across all three sites. However, in both the Tarkine and Bay of Fires regions there was a large majority of unsure responses, which is an important finding.

The tourists responses were narrower (due to survey instrument rather than interview used to elicit reposess) however, it is clear that while there was a strong response (43%) to a desire for the same type of development across all regions, there was a stronger claim of uncertainty (48%).

The reasons for wanting the same type of development across the three regions was due to tourists choosing the type of tourist destination they would like to experience. For example:

[Tourist #1] ‘... Unique’
[Tourist #25] ‘... It’s what we enjoy.’

The desire for differential development across the three reasons was only identified by a few tourists; it seems that most of these expressed a desire to reflect the individual qualities of the regions, rather than have a unified tourist experience. This was expressed in comments such as:

[Tourist #7] ‘... Different areas and environmental impact.’
[Tourist #27] ‘... The three sites have distinct characteristics and tourism profiles already well established. Bathurst harbour should remain more or less undeveloped.’

Figure 24 Preference for the same type of development across all three sites by origin of interview
The uncertainty seemed to be primarily based on a lack of knowledge of the other areas. For example:

[Tourist #8] ‘...I am not familiar with areas’
[Tourist #9] ‘...don't know the area’
[Tourist #120] ‘...not been there yet’

**Summary of Results**

While the results on cumulative impact are not overly clear, there are three core insights that the study has provided.

First, that a preference for the same level of development across all three regions is not aligned to either stakeholder groups or attitude clusters.

Second, that it is clear, particularly for tourists, that there is a lack of understanding about other tourist destinations in Tasmania and hence further work needs doing to unpack how to understand cumulative development preferences when knowledge is low.

Lastly, while stakeholders and tourists chose different attitude clusters there is a shared sense that all the clusters are ‘sustainable’ and preserve access to the environment that is represented in all three regions.

This last issue of similarity across clusters leads into the final results chapter for the report, where we examine the state–wide implications of the alternate clusters on the Tasmania economy. For this final section, we will investigate three state–wide clusters rather than the regionally specific clusters discussed to date.

**6.4 Tourism development scenarios**

Through this report, the focus has been on attitudes to sustainable development of three regions within Tasmania. This final section extrapolates these regional findings to discuss some likely implications for them to the Tasmanian State Economy. The rational for this ‘exploratory’ investigation of state impacts is outlined in Chapter 2, but basically comes down to the fact that the

**Cautionary Note**

*This work is exploratory and based heavily on secondary data.*

*As such, information provided on likely economic impacts to the state should be considered within the whole study — not as standalone figures.*
Tasmania economy is reliant on the Tourism sector and any suggested future development options should consider the likely economic impact.

6.4.1 State–wide development scenarios

To estimate the state–wide economic impacts of alternate development scenarios we first need to identify whole–of state tourism development scenarios. This was undertaken by a secondary factor analysis of the regional attitude clusters (further details and alignment across factors are provided in Chapter 2). The secondary analysis identified three state–wide clusters that explained 87% of everything that the regional clusters contain.

The state–wide clusters were designed the same as the regional clusters and were developed to tell an image driven story that represents the defining features of each scenario, in terms of their preferred tourist development preferences for all three regions combined. The three development scenarios we identified were:

(i) Environmental Engagers
(ii) Outdoor Multi–Users
(iii) Environmental Pragmatists

<p>| Attitude Clusters of Tasmanian– Based Stakeholders for all Three Regions |
|-----------------------------|------------------|
| Development Scenario        | Core Images      |
| Environmental Engagers      | <img src="image1.png" alt="Core Image" /> |
| Combines both Bathurst Harbour clusters, the Bay of Fires: Engagers with Nature and the Tarkine: Protectionists. They believed that tourism development should involve activities where the participant is immersed in the natural environment, but in a way that has minimal impact on the environment. They were concerned about the scale of tourism in the area — they believed a sense of solitude and remoteness is central to the tourism experience. They wanted tourism (numbers and type) to be controlled to ensure minimal environmental impact and retention of the existing tourist experience. |</p>
<table>
<thead>
<tr>
<th>Development Scenario</th>
<th>Core Images</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outdoor Multi–Users</strong></td>
<td><img src="image1.png" alt="Image" /> <img src="image2.png" alt="Image" /> <img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Combines Bay of Fires: Outdoor Recreationalists and Tarkine: Multi–Users. They want to encourage tourism that enables people to access and experience the wonderful natural places. They value activities that can be done by the family and are accessible to the less fit or able. They support an increase in tourism and feel that there needs to better facilitation of tourism: more information, more promotion, and more encouragement of activity development. Their preferred tourism seemed to be based on activities of their own interest and while concerned about environmental impact their activities of choice have a relatively high environmental impact. They are very clear that development should be small–scale tourism particularly in terms of accommodation options, so possibly see the scale of tourism and visual impact as the most harmful aspects.</td>
<td><img src="image4.png" alt="Image" /> <img src="image5.png" alt="Image" /> <img src="image6.png" alt="Image" /></td>
</tr>
</tbody>
</table>

| **Environmental Pragmatists**         | ![Image](image7.png) ![Image](image8.png) ![Image](image9.png) |
| Combines Bay of Fires: Environmental Accommodator’s and the Tarkine: Rugged Pragmatists cluster. The cluster wants accommodation and activities that promote and provide access to the natural values of the area in a way that minimises harm to the environment and experience, but they also want to make those opportunities accessible to a spectrum of people. To do this there is a need to see low impact activities and accommodation. They value the unspoilt natural beauty and sense of remoteness. There is differing opinions regarding the way that tourism should be developed, and how the places should be used and managed. | ![Image](image10.png) ![Image](image11.png) ![Image](image12.png) |
6.4.2 Results for state–wide scenarios

The stakeholders and tourists were classified by these three state–wide development scenarios (Figure 25 and Figure 26). The majority of stakeholders and tourists identified with the Environmental Engagers scenario. This scenario included people from all Tasmanian stakeholder and tourist groups and accounted for 73% of all study participants. As both Bathurst Harbour clusters are in the first state scenario they are not featured in either of the second clusters. The next most popular scenario was the Environmental Pragmatists (representing 18% of respondents), that included all Tasmanian stakeholder and tourist groups. Last, our analysis identified the Outdoor Multi–Users (representing 9%) that was primarily comprised of local and community Tasmanian stakeholders (include two tourism operators) and tourists mainly from Bay of Fires (with one Tarkine tourist).

![Stakeholders by Alternate State–Wide Development Scenario](image)

**Figure 25 Stakeholders by alternate state–wide development scenario**

These scenarios played an important role in determining the possible impacts on the economy, including how each scenario might impact the number and type of tourists visiting Tasmania. Table 21 identifies that from the tourists’ perspective, the three scenarios have slightly different expectations about their expected tourist numbers. The Environmental Engagers and Outdoor Multi–Users would expect to see the same number of tourists with a third stating that more could visit. While the Environmental Pragmatist scenario, clearly shows a split with almost half of tourists expecting more visitors under this scenario.
Tourists by Alternate State–Wide Development Scenario.

![Bar chart](chart.png)

Figure 26 Tourists by alternate state–wide development scenario.

<table>
<thead>
<tr>
<th>Table 21 Preference by development scenario for future number of tourists as identified by tourists and stakeholders*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
</tr>
</tbody>
</table>

In addition to understanding how many tourists the different scenarios wanted we also assessed the amount of development they preferred across the state would be (that is, going back to the cumulative impact issue). Figure 27 identifies that of the tourists in each scenario most Environmental Pragmatists want the same level of development across all three sites (although a large proportion are unsure). Most Environmental Engagers were either unsure or wanted differential development across the three regions, implying a different number of tourists and type of development at each site.
Preference for development by development scenario

Figure 27 Preference for the same type of development across all three sites by development scenario

This section has identified three possible state-wide development scenarios that could be used to gauge exploratory economic impact of the Tasmanian economy. The three scenarios and their main assumptions are expressed in Table 22.

Table 22 Assumptions under pinning state-wide clusters

<table>
<thead>
<tr>
<th>Clusters</th>
<th>Key assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental Engagers</td>
<td>• Desire little if any increase in tourist numbers.</td>
</tr>
<tr>
<td></td>
<td>• Do not necessarily want extra activities, accommodation or ‘tourism product’</td>
</tr>
<tr>
<td></td>
<td>• Want sustainable and appropriate development for each region</td>
</tr>
<tr>
<td>Outdoor Multi-Users</td>
<td>• Desire little if any increase in tourist numbers.</td>
</tr>
<tr>
<td></td>
<td>• Do want extra activities, accommodation and ‘tourism product’</td>
</tr>
<tr>
<td></td>
<td>• Want sustainable and appropriate development</td>
</tr>
<tr>
<td>Environmental Pragmatists</td>
<td>• Happy for an increase in tourist numbers.</td>
</tr>
<tr>
<td></td>
<td>• Do want extra activities, accommodation and ‘tourism product’</td>
</tr>
<tr>
<td></td>
<td>• Want sustainable and appropriate development for the whole state</td>
</tr>
</tbody>
</table>
The three scenarios differ between each other only by tourist expenditure and numbers, as these were the strongest results from our research. For the purposes of this report, we assume all other factors are held constant, such as tourism marketing, financial conditions, climatic et cetera. Importantly, none of these development scenarios consider the role of upfront infrastructure and additional marketing required to reach the extended Tourism market. This is not a failing but a realistic limitation as our results indicate that tourism operators prefer all three scenarios, however it would be outside the bounds of reality in this study to assume that we could even ‘guesstimate’ what expenditure these developments would generate and what sort of impact they would have on the state economy.

6.5 Possible economic impact of scenarios

Recently Tourism Tasmania and the Tasmanian Tourism Industry Council have focused on understanding the economic impact of tourist expenditure and tourism marketing to the regional and state economy. It would be remiss of this study not to acknowledge the importance tourism has to the state economy and to make comments regarding the possible implications this work may have on baseline predictions for future tourist expenditure. As such, we will use the scenarios developed in the previous section with already available tourism projections from Deloitte Access Economics (2013) and State Tourism Satellite Accounts (2011–12). Use and sources for secondary data are described in Chapter 2.

The scenarios presented in Section 6.4 presented three core tourism expenditure scenarios that form the basis of the economic impact analysis:

Scenario 1  **Environmental Engagers** — This is considered the baseline scenario with a continuation of current tourist numbers, spend and development.

Scenario 2  **Outdoor Multi–Users** — This is considered to attract about the same number of tourists, but with differential development across the state, we expect to have an increase in tourism expenditure. This is modelled as compounding growth starting at 1% and growing to 10% (marginal annual increase of 1% per year).

Scenario 3  **Environmental Pragmatists** — This is considered to attract more tourists, growing up to 5% (annually 1%, 3% and then 5% cumulative growth per annum) but with the same expenditure pattern as in the baseline scenario.

The scenarios presented in Section 6.4, based on the three state-wide clusters, form the basis of the economic impact analysis. Each scenario and the expected change from the baseline in terms of tourist number and expenditure are provided in Table 23.
Table 23  Key Assumptions for the Scenarios

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Key assumptions</th>
</tr>
</thead>
</table>
| Scenario 1: Environmental Engagers | • Baseline scenario with current tourism development.  
• Expect same number of tourists as detailed in current tourism projections.  
• Expect same expenditure of tourists as detailed in current tourism projects. |
| Scenario 2: Outdoor Multi–Users | • Tourism development to include a lot more value added products (for example, all-terrain vehicle, horse-riding experiences)  
• Expect same number of tourists as in the baseline  
• Expect an increase in tourism expenditure. This is modelled as compounding growth starting at 1% and growing to 10% (marginal annual increase of 1% per year) |
| Scenario 3: Environmental Pragmatists | • Tourism product to increase in an environmentally sensitive manner, for example more accommodation and transport options.  
• Attract more tourists, growing up to 5% (annually 1%, 3% and then 5% cumulative growth per annum for first 3 years)  
• Same expenditure pattern as in the baseline scenario |

As our primary data did not explicitly collect tourist expenditure or growth figures for each of the clusters, we have made informed assumptions to derive the percentage change identified above. It should be noted that these percentage change points are reasonable and within bounds of reality in tourism studies as discussed in the various tourism region based development plans and the Tourism Industry Marketing study (see Deloitte Access Economics 2013).

Figures 28, 29 and 30 identify the three different scenarios’ direct expenditure and multiplier effect using both high and low multiples as identified by Deloitte Access Economics (2013). Due to the linear growth path followed by all scenarios, there is a marginal increase in contribution to GSP from now until 2020. Additionally, it should be noted that while all three have different (albeit conservative) assumptions, there seems to be minimal difference between Outdoor Multi–Users and Environmental Pragmatists, although they have different assumptions.
Environmental Engagers projects for Gross State Product until 2020

Figure 28  Environmental Engagers projects for Gross State Product until 2020

Outdoor Multi–Users projects for Gross State Product until 2020

Figure 29  Outdoor Multi–Users projects for Gross State Product until 2020
Based on the explorations of each scenario separately we will present all three together to identify the relative change in direct Gross State Product and Employment from the three development scenarios. As shown in Figure 31 there is very little difference between the two scenarios of Environmental Pragmatists and Outdoor Multi–Users (hidden underneath). Both perform better than the baseline scenario of Environmental Engagers. However, both are conditional on an increase in the investment in tourism product to increase tourist expenditure or increase tourist numbers respectively.
Tourism Expenditure Outcomes

Figure 31 Tourism expenditure outcomes by alternate development scenarios measured as direct impact on employment (FTE) and Gross State Product (GSP)
6.6 Summary

The aim of this chapter was to present results of the final phase of the research for the study, looking specifically at the social attitudes to cumulative impacts. In doing this, the chapter directly addresses two of the study’s research questions:

1. Do the attitudes of these stakeholder groups towards sustainable tourism development in single locations recognised for the presence of MNES differ to their attitudes towards sustainable tourism development in multiple locations recognised for the presence of MNES?

2. What are the likely economic impacts of sustainable tourism development on marginal rates of visitation for selected areas recognised for the presence of MNES in Tasmania?

To address these questions, cumulative impacts were investigated in three ways, first data is presented on how likely the stakeholders and tourists were to apply the separate regional attitude cluster to the two other regions. Second, state-wide clusters or scenarios were developed based on second order Q sort analysis. These three development scenarios are discussed in respect to stakeholders and tourists. Finally, the state-wide scenarios are extrapolated onto known economic scenarios for tourism growth in Tasmania to identify any likely economic impacts.

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**Summary of Results**

Our results clearly identify that Tasmanian stakeholders (local, regulators, community and operators) covet more tourist numbers and are more likely to desire uniform cumulative development across the state.

Reasons provided include that the development options all reflected attributes of sustainability, uniqueness of place and maintains values of the separate regions.

Tourists were more circumspect about absolute increases in tourist numbers and were very unsure about the same level of development across all three regions. However, this uncertainty was mainly due to a lack of knowledge of the other areas.

---

The three state-wide development scenarios aligned very well with the previous eight regional clusters. The clusters (for this study) differed by number of tourists and style of development. Each cluster had representatives from stakeholders and tourists with the majority of people in Environmental Engagers then Environmental Pragmatists and only a small group associated with Outdoor Multi-Users. These scenarios were the basis for exploring the economic impact assessment.
The economic impact analysis was an exploratory investigation into the possible changes to the Tasmanian economy based on these development clusters. It was undertaken by taking the state-wide scenarios with already available tourism projections from Deloitte Access Economics (2013) and State Tourism Satellite Accounts (Pham, Kookana & Silec 2013). Overall, the work assumed that the Environmental Engagers category was a baseline for the state tourism industry. Therefore, changes were made in tourist numbers and tourist–spend to investigate the marginal change in direct and indirect tourist expenditure associated with the two other scenarios. Results indicated that all higher direct and indirect expenditure would be attracted to Environmental Pragmatists and Outdoor Multi–Users however there was negligible difference between the two. The research was able to identify some possible advantages to the Tasmanian economy if the tourism market was to expand current tourism product, in some areas to tap into the other two attitude clusters.
Chapter 7
Conclusions

This final chapter reviews the entire study and addresses the outcomes against the research objectives. In addition to an overview of the study, we address the innovations that were achieved through our unique methodological approach. These included advancements in the application of the Q method methodology, innovations in understanding of stakeholder theory and research innovations related to understandings of sustainable tourism spectrums.

Following a discussion of the limitations of the research, which related to the contextual nature of the research and mobility of tourists, the chapter concludes with recommendations. We propose recommendations for policy makers, further research and the tourism industry.

7.1 Summary of Findings

The aim of the study was to provide research into tourism stakeholders’ understanding of and attitudes towards sustainable tourism development in sensitive areas recognised for the presence of Matters of National Environmental Significance (MNES) in Tasmania with a focus on the Outstanding Universal Value (OUV) of world heritage places. For this study we identified stakeholders as locals, operators, those in regulatory positions and domestic tourists visiting Tasmania.

To achieve this aim, we specifically asked three research questions. We answer these questions below.

Research Question 1: What are stakeholders’ attitudes towards sustainable tourism development in sensitive areas in Tasmania, particularly those recognised for the presence of MNES?

We explored the attitudes towards sustainable tourism development in three sensitive area case regions of Tasmania: the Tarkine, the Bay of Fires and the Bathurst Harbour region. Given that sustainable tourism is dependent on the needs of multiple stakeholders being considered, this research first explored the attitudes of Tasmanian stakeholders (locals, community groups, tourism operators and regulators), resulting in attitudinal clusters of preferred tourism development style. Following this, the attitudinal clusters were tested with domestic tourists to Tasmania to decipher what form of tourism development they preferred.

Each region identified specific attitude clusters towards sustainable tourism development that differed by; style of tourism development, amount of tourists desired, and type of tourism product coveted. However, a universal link was that all stakeholders and tourists believed that the cluster representing their attitude to future development was sustainable, site sensitive development that preserved the unique ‘Tasmanian’ experience.
Research Question 2: Do the attitudes of these stakeholder groups towards sustainable tourism development in single locations recognised for the presence of MNES differ to their attitudes towards sustainable tourism development in multiple locations recognised for the presence of MNES?

The results on cumulative impact of development are not clear cut. This issue was investigated with respect to stakeholders and tourists preference to see development at the three regions the same as their preferred attitude cluster for the region of origin (that is, Tarkine, Bay of Fire and Bathurst Harbour). There are three core insights that the study has provided. First, that a preference for the same level of development across all three regions is not aligned to either stakeholder groups or attitude clusters. Second, that it is clear, particularly for tourists, that there is a lack of understanding about other tourist destinations in Tasmania and hence further work needs to unpack how to understand cumulative development preferences when knowledge is low. Lastly, while stakeholders and tourists chose different attitude clusters there is a shared sense that all the clusters are ‘sustainable’ and preserve access to the wilderness that is represented in all three regions.

This similarity across clusters of ‘sustainable’ tourism development leads into the development of state–wide scenarios based on regional clusters. The three state–wide clusters showed clearer results with Environmental Engagers wanting differential development across the state reflecting site–specific values and current levels of development (that is, emerging, developed, etcetera) with Environmental Pragmatists and Outdoor Multi–Users mainly happy to have their development preferences across all three regions.

Research Question 3: What are the likely economic impacts of sustainable tourism development on marginal rates of visitation for selected areas recognised for the presence of MNES in Tasmania?

The state–wide scenarios or attitude clusters differ between each other only by tourist expenditure and numbers, and style of tourism development. For the purposes of this report, we assume all other factors are held constant, such as tourism marketing, financial conditions, climatic etcetera. As our primary data did not explicitly collect tourist expenditure or growth figures for each of the clusters, we have made ‘heroic’ assumptions to derived the percentage change.

Scenario 1 Environmental Engagers — this is considered the baseline scenario with a continuation of current tourist numbers, spend and development.

Scenario 2 Outdoor Multi–Users — this is considered to attract about the same number of tourists, but with differential development across the state we expect to have an increase in tourism expenditure. This is modelled as compounding growth starting at 1% and growing to 10% (marginal annual increase of 1% per year).

Scenario 3 Environmental Pragmatists — this is considered to attract more tourists, growing up to 5% (annually 1%, 3% and then 5% cumulative growth per annum) but with the same expenditure pattern as in the baseline scenario.
It should be noted that these percentage change points are reasonable and within bounds of reality in tourism studies as discussed in the various regional tourism development plans and the Tourism Industry Marketing study (see Deloitte Access Economics 2013). The impact on state–wide revenues from tourism expenditure was shown to be a marginal difference between the Environmental Engagers and the additional spend of the other two scenarios of up to 16% by 2020. Both the Outdoor Multi–Users and the Environmental Pragmatists performed very similarly.

The research used to answer these three research questions was novel (Q method, tourist surveys with pictures), involved (98 in–depth interviews and 137 surveys in situ) and complex (four disciplinary backgrounds, mixing quantitative and qualitative data, many interested stakeholders, short timeframes). However, this approach to research is necessary in dealing with state–wide tourism development issues in potentially impacting on matters of national significance. Further information on the approach is in Chapter 2 and highlights of the research innovation are provided below.

7.2 Research innovation

7.2.1 Attitude clusters across region and state

The use of the Q method is growing in significance and importance, especially in tourism studies (see Hsu and Song, 2014 and Hunter, 2013). It is well suited to describe preference groups, based on eliciting individual preferences for specific scenarios or desires – particularly in tourism where the industry is very visual in its assessment of issues. Our research identified that due to the site specific nature of the different regions under investigation, the interviews including the Q method, should be deployed separately for each region. This is common practice. However, while the clusters were separate and highlighted specific issues at each region, there was also considerable overlap between the clusters. As such, we opted to do a second order Q methodology sort to determine if state–wide clusters could be gleaned from the eight regionally identified clusters. The results were statistically strong and so our state–wide scenarios were based on this second order Q sort. The more traditional approach to using Q method to determine state–wide clusters would have been to resort all the original interviews (not just sort within region – but combine them all) into clusters. This option was tested but not taken, as it was felt the second order analysis (that is, sorting eight clusters) produced stronger and more coherent results while the state wide, first order analysis (sorting all interviews) elicited greater diversity with less clearly identifiable clusters for this study.

7.2.2 Q method innovations

Most Q method studies use written statements as the elements that respondents need to sort and organise. However, the use of pictures instead of written cues is growing in significance (for example, Fairweather & Swaffield 2001). Most of this work uses pictures in the interview process (as we did) and then if a secondary phase of analysis is used to test the applicability of the clusters to other stakeholders groups then these factors are reduced to names, written descriptions and perhaps a visual prompt (see Fairweather & Swaffield 2002).
The innovative aspect to our study was the continuation of using only visual cues to elicit preferences and leaving each photo’s interpretation open to the respondent. This innovation ensured that there was less bias given to tourists as to what the attitude cluster represented from the stakeholders perspective. It also continued the strong role of visual engagement that the tourism industry has with its surroundings, being more representative of this particular industry’s needs in assessing development options.

7.2.3 Innovations in stakeholder theory

There is now a widespread acceptance within the tourism literature that sustainable tourism requires the needs of all stakeholders to be met (Byrd 2007; Hardy & Beeton 2001).

There is plethora of research exploring tools and methods for implementing stakeholder involvement in tourism (Sautter & Leisen 1999; Bryd 2007), the role of stakeholder involvement in determining the success of destinations and destination management organisations (Bornhost, Ritchie & Sheehan 2010) and methods to enhance stakeholders participation (Waligoa Clarke & Hawkins 2012). However, other aspects of understanding the role of stakeholders in sustainable tourism have been sidelined due to debate over what sustainable tourism really means (Waligoa, Clarke & Hawkins 2012). For example, underpinning the definition of sustainable tourism development, defined by the World Tourism Organisation (1998) is the assumption that different stakeholder groups will have differing opinions. They define sustainable tourism as: ...[meeting] the needs of the present tourists and the host regions while protecting and enhancing opportunities for the future (World Tourism Organisation 1998: 21). Traditional approaches to stakeholders’ attitudes tend to identify the stakeholders groups, assess their attitudes and focus on the differences between these groups (Suman, Shivlani & Milon 1999; Imran et al. 2014; Alam & Beaumont 2014). Surprisingly there is little research that assesses multiple stakeholder opinions concurrently (Hardy & Beeton 2001; Kuvan & Akan 2012) and that which focuses on attitudinal segments formed by opinions rather than stakeholder group. This tendency assumes that one’s physical vocation defines their attitudes, such as being employed as a tourism operator or regulator.

The innovative approach of this research is that it moved beyond the assumption that vocation informs attitudes. The inductive and largely qualitative nature of this research meant although stakeholder groups in our case study areas were initially defined by their vocation (that is, operators, regulators, locals, members of community groups), our analysis revealed that attitudinal segments were not confined to these groups. Indeed, groups based on attitudes were far more relevant and predominant in all our case study regions, meaning that they were made up of individuals from different vocationally based stakeholder groups.

7.2.4 Development of a new sustainable tourism development spectrum

The research design looked for a method of sorting and categorising images that represented sustainable tourism relevant to nature-based activities. As part of this process, we modified the Boyd and Butler’s (1996) Ecotourism Spectrum (ECOS), itself an adaptation of the Recreation Opportunity Spectrum (Clark & Stankey 1979). The ECOS was useful but our focus was not
restricted to ‘ecotourism’; we wanted to encompass all tourist experiences related to the natural environment in the case study areas, and as such, we adjusted the spectrum. We developed new categories of tourists, and selected criteria that more accurately measured a range of sustainable tourism experiences as opposed to ecotourism activity. These included access, accommodation, impacts and management, and visitor experiences, including the impacts, energy use and level of intensity of activities. The Sustainable Nature–Based Tourism Development Spectrum formed the basis for our selection of photographs. It should be noted that the spectrum focused only on aspects related to the tourism experience and associated infrastructure. Aspects that are traditionally included in definitions of sustainable tourism, such as interaction with the host community and socio-cultural impacts, were not assessed within this spectrum.

The spectrum revealed that despite some regional differences (all stakeholders for the Bathurst Harbour region fell into the ‘eco-specialist category’ while the preferred images for the Tarkine and Bay of Fires fell across the three spectrums of eco-specialist, facilitated nature-users, and generalists with a slight dominance in the eco-specialist spectrum) there was an over-riding preference for ‘eco-specialist’ tourism in our three case study regions. When preferences were made for non-eco-specialist tourism and for photographs that sat within the ‘generalist’ spectrum, these were generally explained as being chosen because the individuals liked the particular activity (for example, horse riding), or supported access. Commonly, their explanations included concern about aesthetic and environmental impact. It seems, therefore, that many respondents across the attitude clusters had concern for the environment. Protection was a common element across the clusters. However, ‘protection’ meant different things to different people. For example, some people talked about protecting the place but also wanted to ride horses, or use quad bikes; indeed one participant’s preferred activity was horse riding and they disagreed with hiking, because of the impacts from the hikers.

Reinforcing the common concerns for protection and environmental impact was the commonality of ‘least liked’ images. Sixteen of the least preferred images were from the generalist spectrum, and all attitude clusters selected at least one image from this spectrum. Arguably, the majority of the least preferred images represented relatively high levels of access, and aesthetically inappropriate infrastructure for natural places. There appeared to be a consistent dislike of these features, who were perceived as intruding on the natural environment and increasing access to that environment. In doing so, these photographs also revealed participants’ preference for locally based, small–scale tourism.

In terms of social sustainability some locals, community members and regulators in Bathurst Harbour, the Tarkine and Bay of Fires indicated they wanted either the same number of tourists or fewer. This reinforced that whilst there is general acceptance and agreement for growth in tourism in these areas, there is also a belief that tourism should not come to dominate and have a negative impact on the lives of local residents. Environmental and economic sustainability notwithstanding, it is important that tourism development does not adversely impact the quality of life for local residents. Based on the comments we attained an important factor here is locals continuing to be able to engage in their preferred leisure activities, such as horse riding, quad bikes and spending time in the location of choice uninterrupted by tourists. Whilst it is important to develop
environmental protection strategies these should not disenfranchise locals from their preferred leisure activities, perhaps through the use of zoning, and careful/extensive/thoughtful communication.

In terms of economic sustainability the responses indicate an overall acceptance of tourism as providing economic benefit to the community, with some individuals (not consistent across any attitude cluster) stating that they were dubious that tourism would be viable in the Tarkine, and/or solve the economic problems.

7.3 Limitations

Our approach was essentially qualitative in nature — aiming to elicit the breadth of opinion but not attempting to measure the representativeness of this opinion. We aimed to ensure that we spoke to all stakeholder groups who might provide diverse opinions. We are confident we achieved this. However, the interview process is, in part, a self-selecting process where interested stakeholders may be more likely to engage with the research than those who are disinterested. In examining and interpreting the Q sort data and interviews, we must therefore remember that the proportions of opinion are not representative — rather the data provides a detailed account of what the opinions are.

Our approach to Tarkine locals, interviewed in Smithton resulted in a set of respondents who are mostly more than fifty years of age. Because of this bias, we moved our data collection to improve our respondent range, but still achieved a respondent set that is biased toward the over-fifties. All social research is contextually tied, and we need to acknowledge that at the time of this study (and a continuing issue) there was great angst in the Tarkine regarding changes to forestry employment, and the imposition of protected status over the local natural areas. Local residents felt that decisions were being made that over turned their lifestyle and employment security associated with logging, and that decisions were being made without consideration to their feelings and points of view. Consequently, any efforts to discuss the alternative industry — tourism — were viewed as further ‘salt in the wound’. We were fully aware of residents’ frustrations in this area prior to the research and used strategies that we hoped would enable residents and other local stakeholders to want to participate in this study. We ensured residents were aware of the study and its focus on tourism and that the study aimed to collect all stakeholders’ perspectives; we tried to find convenient public opportunities for stakeholders to participate; and we listened sympathetically to stakeholders views and anger, when it arose.

We were hoping for a representative sample of Tasmania’s nature–tourists. Our tourist sample was targeted toward those tourists visiting one of the three case study sites, that is, we were targeting tourists with an interest in nature tourism. Again, the data needs to be understood in this context—the data does not include insight into Tasmanian tourism as a whole, including the significant culture/creativity tourist segments. Our tourist sample from the Bay of Fires and the Tarkine have higher proportions of people over fifty years of age than does the whole of Tasmania tourist population. This may be reflective of the nature tourism segment. It should be noted that Tourism Tasmania does not collect visitation data specifically related to any of the three case study areas,
and so our comparison to known tourist characteristics is limited. We recommend that if any of these three areas will be promoted or developed then data collection for these particular sites will be useful.

7.4 Recommendations

The implications of this study may be categorised into a number of different recommendations. We have divided these into three sections: policy implications, research implications and tourism industry implications.

**Recommendations for Policymakers**

1. Both the state–wide and regional attitudinal clusters in this study identified the level of tourism development that stakeholders are willing to ‘bear’. In the Tarkine and Bay of Fires, three clear attitudinal clusters emerged, while in Bathurst Harbour we identified two. For policy makers, these attitudinal groups may prove useful for the design of future tourism development policies and approval processes.

2. This research highlighted the highly parochial nature of Tasmania. We elicited clear differences in attitudes between the regions in terms of their tourism preferences. We recommend that policymakers consider this and develop tourism policy that is sensitive to regional differences.

3. The research focused on developing sustainable tourism scenarios, based on the preferences of Tasmanian stakeholders and tourists to Tasmania. The scenarios were developed from photographs that graphically represented sustainable tourism options only. Arguably, sustainable tourism destinations and attractions have the potential to compete with cultural and creative tourism attractions and festivals. The research team recommends that this study should be viewed only as one that addresses sustainable tourism preferences. Further research is necessary to elicit preferences for cultural and creative tourism attractions and festivals and their relationship to sustainable tourism products. This is necessary to ensure that one sector is not given preference to the detriment of the other.

4. We recommend that future tourism development applications ensure that stakeholder consultation occurs with a broad cross section of stakeholders, including local community members, members of community non–governmental organisations, tourists, operators and those in regulatory positions.

5. The results highlighted simmering tensions in the Bay of Fires and Tarkine over the potential loss of local amenities as a result of increased tourism development. We recommend that future policy makers consider the creation of ‘zones’ to ensure that that locals retain their recreational amenities, and tourism opportunities and infrastructure occurs in geographically different parts of the region. Approaches such as these may help alleviate or prevent future conflict over usage.

6. Generally, stakeholders positively viewed future development and increased tourism numbers in the Bay of Fires and Tarkine. This willingness to bear greater tourism numbers and sustainable tourism development suggests that policy makers may consider streamlining approval processes for tourism development in Tasmania.
Recommendations for the Tasmanian Tourism Industry

1. The approval process for tourism development in protected areas is often debated in Tasmania. This research has revealed willingness for specific forms of tourism to be developed and for tourism numbers to increase in some cases. The findings of this study suggest that there would be support from a range of stakeholder groups for streamlining approval processes for sustainable tourism development.

2. There is need to strengthen the tourist data set. Further research should be undertaken to reveal whether the opinions of tourists in a particular case study region differ from those who visit other parts of Tasmania. Similarly, further research is also needed to elicit whether those who do not visit Tasmania at all, but are aware of the Tarkine, have differing opinions on how tourism development should occur in the region.

3. This study relied on visitation data that has been generated on a state-wide scale as our research revealed a dearth in regional tourism data. We recommend that further research be conducted in order to understand the numbers of visitors to the Tarkine, Bay of Fires and Bathurst Harbour, and their movement within these regions.

Recommendations for Future Tourism Research

1. This research revealed that attitudes towards tourism development in Tasmania did not align with stakeholder groups. Significantly, this finding challenges traditional approaches to stakeholder analysis, whereby assumptions are often made that stakeholders’ views align with their stakeholder group. The findings from this study suggest the need for further research to explore this phenomenon in more detail.

2. Although the study was able to elicit stakeholders’ attitudes towards tourism development and the reasoning behind the forms of tourism development that they liked or disliked, further research is need to explore the relationship between participants attachment to the case study region and whether this affected their preferences for tourism development.

3. This research utilised a novel methodology, which proved particularly useful in regions where the communities were sceptical of research, or felt they were ‘over-surveyed’. Its visual nature would also be very useful in regions where literacy rates may be low, or if English was not participants’ first language. Further research into the use of novel methodologies as a technique to increase community engagement in research is recommended.
REFERENCES


Legge RW (1928) Tasmanian Aboriginal middens of the West Coast. *Australian and New Zealand Association for the Advancement of Science*, vol 19, pp 323–328.


APPENDICIES

A. Sustainable Tourism Spectrum
B. Stakeholder Interviews
C. Tourist Interviews
D. Photos used in Q Sort
Appendix A
Sustainable Tourism Spectrum

A detailed discussion of the development of Sustainability Spectrum.

The Ecotourism Spectrum (ECOS) complies with these conditions, but has an additional of the factor 'level of skill and knowledge'. This is not directly under management control, but the skill and knowledge of any commercial operator would be (in that they would not receive a permit to operate in a national park if not demonstrating given levels of competency, and would not receive public liability insurance). It is important to acknowledge these criteria because they ensure that the reliability, relevance and usefulness of the framework. It should be pointed out, that the original Recreational Opportunity Spectrum (ROS) was designed, and has been used as a management tool for protected areas and other natural areas. The Ecotourism Spectrum was also designed to be a management tool.

The Recreational Opportunity Spectrum mapped out four 'recreation opportunities': modern, semi-modern, semi-primitive and primitive. A recreationist who wanted a semi-modern experience for example would generally not want to experience one of the other three, and the manager's job was to provide all or some of the recreation opportunities in a way which ensured that opportunity type was protected, and did not overlap detrimentally with the other recreation opportunities.

In the same way the original ECOS framework that we used maps three ecotourism opportunities; eco-specialist, intermediate and eco-generalist — the managers task is to provide these experience types in a way which protects that experience. For example at Bathurst Harbour, managers might provide for both the eco-specialist and the intermediate and thus need to provide management strategies that ensure the two ecotourist 'opportunities' are maintained and that the engagement in either of these does not negatively impact on the other (see following figure).
The Components of the Ecotourism Opportunity Spectrum (ECOS)
(modified from Boyd & Butler, 1996, p 560)

<table>
<thead>
<tr>
<th>ACCESS</th>
<th>Eco-Specialist</th>
<th>Intermediate</th>
<th>Eco-Generalist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficulty</td>
<td>Arduous &amp; Hard</td>
<td>Difficult &amp; Vigorous</td>
<td>Moderate &amp; Easy</td>
</tr>
<tr>
<td>Transportation</td>
<td>Waterways</td>
<td>Roads-Loose Surface</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Float Planes</td>
<td>Roads-Logging</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Roads-Paved</td>
</tr>
<tr>
<td>Marketplace</td>
<td>Personal Experience Friends</td>
<td>Local Tourism Operators</td>
<td>Travel Companies</td>
</tr>
<tr>
<td>Information Channels</td>
<td>Word of Mouth</td>
<td>Advertisements &amp; Local Tourism Brochures</td>
<td>Travel Company Tours</td>
</tr>
<tr>
<td>Means of Conveyance</td>
<td>Foot, Canoes, Horses</td>
<td>Motorised Vehicles</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OTHER RESOURCE RELATED ACTIVITIES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationships</td>
<td>Incompatible</td>
</tr>
<tr>
<td></td>
<td>Depends on Nature &amp; Extent</td>
</tr>
<tr>
<td></td>
<td>Compatible on a Larger Scale</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ATTRACTIONS OFFERED</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>More Orientated to Natural Environment</td>
<td>Focus on Natural and Cultural Aspects</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXISTING INFRASTRUCTURE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Extent</td>
<td>No Development</td>
</tr>
<tr>
<td></td>
<td>Development only in Isolated Areas</td>
</tr>
<tr>
<td></td>
<td>Moderate Development</td>
</tr>
<tr>
<td>Visibility</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Primarily Natural</td>
</tr>
<tr>
<td></td>
<td>Obvious Changes</td>
</tr>
<tr>
<td>Complexity</td>
<td>Not Complex</td>
</tr>
<tr>
<td></td>
<td>Level of Complexity Increasing</td>
</tr>
<tr>
<td>Facilities</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Search &amp; Rescue</td>
</tr>
<tr>
<td></td>
<td>Rustic Accommodation</td>
</tr>
<tr>
<td></td>
<td>……Some comforts</td>
</tr>
<tr>
<td></td>
<td>(lodges)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOCIAL INTERACTION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Ecotourists</td>
<td>Avoid or Little Contact</td>
</tr>
<tr>
<td>Hosts (local population)</td>
<td>Little Contact</td>
</tr>
<tr>
<td></td>
<td>Some Contact (travel in small groups)</td>
</tr>
<tr>
<td></td>
<td>Some Interpretation &amp; Use of Basic Services</td>
</tr>
<tr>
<td></td>
<td>Frequent Contact; Service &amp; Source for Handicrafts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LEVEL OF SKILL &amp; KNOWLEDGE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional &amp; Extensive</td>
<td>Extensive to Limited</td>
</tr>
<tr>
<td></td>
<td>Minimal to no knowledge</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ACCEPTANCE OF VISITOR IMPACTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree of Impact</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Low to Moderate</td>
</tr>
<tr>
<td></td>
<td>High-Degree</td>
</tr>
<tr>
<td>Prevalence of Impact</td>
<td>Minimal or Uncommon</td>
</tr>
<tr>
<td></td>
<td>Prevalent in Small Areas</td>
</tr>
<tr>
<td></td>
<td>Prevalent</td>
</tr>
<tr>
<td>Level of control</td>
<td>No Control</td>
</tr>
<tr>
<td></td>
<td>Minimum Control</td>
</tr>
<tr>
<td></td>
<td>Moderate to Strict Control</td>
</tr>
</tbody>
</table>
Appendix B
Stakeholder Interviews

COMMUNITY MEMBERS

Interviewer: __________
Location: __________
Respondent Code: __________
Date: __________

Hello, we are doing research into people’s attitudes towards tourism development in Tasmania. Would you be interested in participating?

SHOW CARDS As you can see from this image, we are exploring people’s attitudes towards tourism development in natural areas. For our study today, we are focussing on the area of the [Case Study Region].

1. Which of the following best describes your residential status in the [Case Study Region]?
   a ☐ I live full time in the [Case Study Region]
   b ☐ I own a shack in the [Case Study Region] and visit often
   c ☐ I own a shack in the [Case Study Region] and visit occasionally
   d ☐ I am currently in the [Case Study Region] for seasonal work and will probably relocate after the season is over
   e ☐ I don’t own land in the [Case Study Region] but visit the region regularly
   f ☐ I work in the area and rent
   g ☐ I have never been there but belong to an interest group that supports the region.
      Name of Interest Group: ____________________ Go to Question 2
   h ☐ Other: ____________________

2. SHOW CARDS If you have never been to the [Case Study Region] before, how likely are you to go there within the next two years?
   1 Very un-likely  2 Not likely  3 No opinion  4 Quite likely  5 Extremely likely

3. Do you work in tourism or an industry that benefits from tourism?
   a ☐ Yes.
   b ☐ No.

4. Does anyone in your family work in tourism or an industry which benefits from tourism?
   a ☐ Yes.
   b ☐ No.
COMMUNITY MEMBERS, survey cont

5. Please indicate your attachment to the [Case Study Region] by circling where your preference lies:

<table>
<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither Agree or Disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel the [Case Study Region] is part of me</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I feel very attached to the [Case Study Region]</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I don't have particularly strong feelings for the [Case Study Region]</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The [Case Study Region] is very special to me</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The [Case Study Region] is one of my favourite places to be</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I miss the [Case Study Region] when I am away from it for too long</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

6. When you think of the [Case Study Region], what words would you use to describe the region?

_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

7. When you think of tourism in the [Case Study Region] what words come to your mind?
   - prompts - tourism
   what do you like/ dislike about it? If dislike what would you do to change it?
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________
COMMUNITY MEMBERS, survey cont

8. SHOW CARDS If YES, When you think about the number of tourists who go to the [Case Study Region] NOW, should the [Case Study Region] be trying to attract ... (tick one only)
   a □ Fewer
   b □ About the same numbers
   c □ More

9a. Now that you have done this, I would like you to sort some pictures. All of the pictures depict different types and levels of tourism development. When we talk about tourism development we mean things like transport, roads, accommodation, visitor information, the amount of people, management, activities and different styles of tourism. When you look at the picture please try to focus on the tourism development in the photo, not the quality/colour schemes/ composition/ artistic merit of the photos.

FIRSTLY I would like you to sort these pictures into THREE piles – one which has the amount and type of tourism development you like in the [Case Study Region] destination; the second which has the amount and type of tourism development you don't like in the [Case Study Region] destination; and the third which depicts the amount of tourism development you neither do nor don’t like in the [Case Study Region] destination.

FROM YOUR PILE OF PICTURES WHICH YOU LIKE, I would like you to pick the images of tourism development which you like the most
   • Now pick the image which you like the most
   • Now pick the two images which you like the most
   • Now pick the four images which you like the most

FROM YOUR PILE OF PICTURE WHICH YOU LIKE THE LEAST, I would like you to pick the image of tourism development which you DISLIKE the most
   • Now pick the images which you DISlike the most
   • Now pick the two images which you DISlike the most
   • Now pick the four images which you DISlike the most

FROM YOUR PILE OF PICTURES WHICH YOU NEITHER LIKED OR DISLIKED, I would like you to sort the remaining photos

****INTERVIEWER: ENSURE YOU PLACE A LINE IN THE RECORDING SHEET WHERE THE LIKE AND DISLIKE ENDS********
COMMUNITY MEMBERS, survey cont

9b. now that you have sorted your photographs, please tell me why you chose the piles
- why did you classify your pictures in this way?
- Preferences for numbers of people in the classifications
- Preferences for size and type of accommodation in the classification
- Preferences for infrastructure, facilities and roads in the classification
- For the sorted piles which participants do NOT like, Would you still want to go there if it looked like this?

Order your preferences for tourism development

Data Recording Sheet Only
Subject No. ______________
Date: ______________
Location: ______________

LIKE

DISLIKE
COMMUNITY MEMBERS, survey cont

10. SHOW CARDS As part of our study, we are looking at two other locations (SHOW MAP). Would you support the same level and style of development in all three of these locations?

a □ Yes. If Yes, why?
____________________________________________________________________________
____________________________________________________________________________

b □ No. If No, why?
____________________________________________________________________________
____________________________________________________________________________

c □ Unsure. If Unsure, why?
____________________________________________________________________________
____________________________________________________________________________

11. In your mind, do these 3 regions differ in any way?
____________________________________________________________________________
____________________________________________________________________________

12. Have you been to these areas?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. In what age bracket do you fit?

a □ 14-20
b □ 21-30
c □ 31-40
d □ 41-50
e □ 51-60
f □ 61 plus
14a. Where were you born?
   a □ within 50km of the [Case Study Region] - if this is selected, please answer question 14b
   b □ Elsewhere in Tasmania
   c □ Elsewhere in Australia
   d □ In another country

14b. If you were born within 50km of the [Case Study Region], how many years have you lived there (or owned a property)?

15. Are you now in paid employment?
   a □ Yes, full time, If yes, please go to Q 19
   b □ yes, part time, If yes, please go to Q 19
   c □ No, retired
   d □ No, students
   e □ No, looking or work
   f □ No, home duties,
   g □ No, do no work
   h □ Other: __________________

16. What is your day time occupation?
   a □ Professional (Director, doctor, lawyer etc.)
   b □ Other professional (Nurse, teacher, policeman)
   c □ Manager/business owner (general Manager, head, partner, proprietor)
   d □ Sales Person/shop worker/ office worker (Clerk, receptionist)
   e □ Skilled or semi-skilled worker (electrician, carpenter, waiter, apprentice)
   f □ Other manual worker

END OF COMMUNITY MEMBERS INTERVIEW
SHOW CARDS As you can see from this image, we are exploring people's attitudes towards tourism development in natural areas. For our study today, we are focussing on the area of the [Case Study Region].

1. When you think of the [Case Study Region], what words would you use to describe the region?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

2. When you think of tourism in the [Case Study Region] what words come to your mind?
   -prompts- tourism
   what do you like/dislike about it? If dislike what would you do to change it?
   ________________________________________________________________
   ________________________________________________________________

3. SHOW CARDS If YES, When you think about the number of tourists who go to the [Case Study Region] NOW, should the [Case Study Region] be trying to attract ... (tick one only)
   a ☐ Fewer
   b ☐ About the same numbers
   c ☐ More

4. Which of the following best describes your business status in the [Case Study Region]?
   a ☐ I run a business in the region
   b ☐ I run a business in the region and have plans to develop more in the region
   c ☐ I run a business in the region and had plans to develop more in the region but put these plans on hold
   d ☐ I am in the process of developing a business in the region
   e ☐ I am a regulator who is involved in businesses in the region
   f ☐ Other: ______________________________________________________

5. If possible, could you please describe your business / planned business?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
6. How would you describe the process of developing a new business in that area  
Prompts: what worked/ what didn’t work

_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

7. SHOW CARDS Please indicate your attachment to the [Case Study Region] region by circling where your preference lies:

<table>
<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither Agree or Disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel the [Case Study Region] is part of me</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I feel very attached to the [Case Study Region]</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I don’t have particularly strong feelings for the [Case Study Region]</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The [Case Study Region] is very special to me</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The [Case Study Region] is one of my favourite places to be</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I miss the [Case Study Region] when I am away for it for too long</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
OPERATORS/DEVELOPERS, survey cont

8a. Now that you have done this, I would like you to sort some pictures. All of the pictures depict different types and levels of tourism development. When we talk about tourism development we mean things like transport, roads, accommodation, visitor information, the amount of people, management, activities and different styles of tourism. When you look at the picture please try to focus on the tourism development in the photo, not the quality/colour schemes/composition/artistic merit of the photos.

FIRSTLY I would like you to sort these pictures into THREE piles – one which has the amount and type of tourism development you like in the [Case Study Region] destination; the second which has the amount and type of tourism development you don’t like in the [Case Study Region] destination; and the third which depicts the amount of tourism development you neither do nor don’t like in the [Case Study Region] destination.

FROM YOUR PILE OF PICTURES WHICH YOU LIKE, I would like you to pick the image of tourism development which you like the most
- Now pick the image which you like the most
- Now pick the two images which you like the most
- Now pick the four images which you like the most

FROM YOUR PILE OF PICTURES WHICH YOU LIKE THE LEAST, I would like you to pick the image of tourism development which you DISLIKE the most
- Now pick the image which you DISlike the most
- Now pick the two images which you DISlike the most
- Now pick the four images which you DISlike the most

FROM YOUR PILE OF PICTURES WHICH YOU NEITHER LIKED OR DISLIKED, I would like you to sort the remaining photos

****INTERVIEWER: ENSURE YOU PLACE A LINE IN THE RECORDING SHEET WHERE THE LIKE AND DISLIKE ENDS*******

8b. now that you have sorted your photographs, please tell me why you chose the piles
- why did you classify your pictures in this way?
- Preferences for numbers of people in the classifications
- Preferences for size and type of accommodation in the classification
- Preferences for infrastructure, facilities and roads in the classification
- For the sorted piles which participants do NOT like, would you still want to go there if it looked like this?
Order your preferences for tourism development

Data Recording Sheet Only
Subject No. ________________
Date: ________________
Location: ________________

9. **SHOW CARDS** As part of our study, we are looking at two other locations (SHOW MAP).

Would you support the same level and style of development in all three of these locations?

a □ Yes. If Yes, why?

b □ No. If No, why?

c □ Unsure. If Unsure, why?
10. In your mind, do these 3 regions differ in any way?

_______________________________________________________________________________
_______________________________________________________________________________

11. Have you been to these areas?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. Do you have business interests in these areas?

<table>
<thead>
<tr>
<th></th>
<th>If YES- type of interests</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13a. Where were you born?
   a ☐ within 50km of the [Case Study Region] - if this is selected, please answer question 12b
   b ☐ Elsewhere in Tasmania
   c ☐ Elsewhere in Australia
   d ☐ In another country

13b. If within 50km of the [Case Study Region], how many years have you lived there (or owned a property)?

END OF OPERATORS/DEVELOPERS INTERVIEW
Appendix C
Tourist Interviews

SURVEY FOR DOMESTIC VISITORS TO BATHURST HARBOUR

1. Are you visiting Tasmania:
   a ☐ in a rented, borrowed, or your own vehicle
   b ☐ as part of an organised bus tour
   c ☐ as a cruise ship passenger
   d ☐ other: ________________________

2. When you think about the number of tourists who go to BATHURST HARBOUR, should Bathurst Harbour be trying to attract ... (tick one only)
   a ☐ Fewer
   b ☐ About the same number
   c ☐ More

3. Below are 2 groups of photos for possible tourism development in BATHURST HARBOUR. Please rank the groups from 1-2 (where 1 is your favourite & 2 is your least favourite) according to how you would like tourism to exist in BATHURST HARBOUR.

   Group 1

   Rank ___

   Group 2

   Rank ___

4. Are there other options you would prefer to see?
   ______________________________________________________
   ______________________________________________________
5a. As part of our study, we are looking at two other locations: the Tarkine and the Bay of Fires. Would you rank your preference for tourism development in these locations in the same way?
- a ☐ Yes
- b ☐ No
- c ☐ Unsure

5b. Please tell us why you made this choice:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

6. In your mind, do these 3 regions differ in any way?
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

7. On a scale of 1 to 5, please indicate your preference for visiting the following types of attractions during your visit to Tasmania.

<table>
<thead>
<tr>
<th>Nature based locations</th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don't have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>History and cultural sites</th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don't have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fine wine and food locations</th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don't have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Art and cultural attractions</th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don't have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

8. How long do you intend to stay in Tasmania ____________ days

9. Have you been to these areas?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Now that we have talked about natural tourist destinations in Tasmania are you more likely to go visit them?
- a ☐ Yes
- b ☐ No

11. If the destinations we have just discussed were developed according to your preferences would you be more likely to visit them?
- a ☐ Yes
- b ☐ No

12. In what age bracket do you fit?
- a ☐ 14-20
- b ☐ 21-30
- c ☐ 31-40
- d ☐ 41-50
- e ☐ 51-60
- f ☐ 61 plus

13. In what state do you live?
- a ☐ Victoria
- b ☐ New South Wales
- c ☐ Queensland
- d ☐ Northern territory
- e ☐ South Australia
- f ☐ Western Australia
- g ☐ Tasmania

14. If you have any other comments about the current state of tourism in Bathurst Harbour, please let us know.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Page 153
SURVEY FOR DOMESTIC VISITORS TO BAY OF FIRES

1. Are you visiting Tasmania:
   a ☐ in a rented, borrowed, or your own vehicle
   b ☐ as part of an organised bus tour
   c ☐ as a cruise ship passenger
   d ☐ other: __________________

2. When you think about the number of tourists who go to BAY OF FIRES, should Bay of Fires be trying to attract … (tick one only)
   a ☐ Fewer
   b ☐ About the same number
   c ☐ More

3. Below are 2 groups of photos for possible tourism development in BAY OF FIRES. Please rank the groups from 1-2 (where 1 is your favourite & 2 is your least favourite) according to how you would like tourism to exist in BAY OF FIRES.

   Group 1
   [Images of photos]
   Rank

   Group 2
   [Images of photos]
   Rank

   Group 3
   [Images of photos]
   Rank

4. Are there other options you would prefer to see?
   ______________________________________________________
   ______________________________________________________

Chief Investigator: Dr Anne Hardy
Anne.Hardy@utas.edu.au
Ph: 03 6226 7687
5a. As part of our study, we are looking at two other locations: the Tarkine and the Bathurst Harbour. Would you rank your preference for tourism development in these locations in the same way?
   a □ Yes
   b □ No
   c □ Unsure

5b. Please tell us why you made this choice:
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

6. In your mind, do these 3 regions differ in any way?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

7. On a scale of 1 to 5, please indicate your preference for visiting the following types of attractions during your visit to Tasmania.

<table>
<thead>
<tr>
<th></th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don't have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature based locations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>History and cultural sites</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Fine wine and food locations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Art and cultural attractions</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

8. How long do you intend to stay in Tasmania ___________ days

9. Have you been to these areas?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Now that we have talked about natural tourist destinations in Tasmania are you more likely to go visit them?
    a □ Yes
    b □ No

11. If the destinations we have just discussed were developed according to your preferences would you be more likely to visit them?
    a □ Yes
    b □ No

12. In what age bracket do you fit?
    a □ 14-20
    b □ 21-30
    c □ 31-40
    d □ 41-50
    e □ 51-60
    f □ 61 plus

13. In what state do you live?
    a □ Victoria
    b □ New South Wales
    c □ Queensland
    d □ Northern territory
    e □ South Australia
    f □ Western Australia
    g □ Tasmania

14. If you have any other comments about the current state of tourism in Bay of Fires, please let us know.
   ________________________________________________________________
   ________________________________________________________________

Page 155
SURVEY FOR DOMESTIC VISITORS TO THE TARKINE

Hello, we are doing research into people’s attitudes towards tourism development in Tasmania. We are looking for visitors to Tasmania who do not normally live in Tasmania. Would you be interested in participating? If yes, before we start we need to ask some questions to see if your visitor profile meets our research needs?

1a. Are you visiting Tasmania:
   a □ in a rented, borrowed, or your own vehicle
   b □ as part of an organised bus tour
   c □ as a cruise ship passenger
   d □ other: ______________________

3b. When you think about the number of tourists who go to the TARKINE, should the TARKINE be trying to attract ... (tick one only)
   a □ Fewer
   b □ About the same numbers
   c □ More

Below are 3 scenarios for tourism development in the Tarkine. Please rank the three options from 1-3 (where 1 is your favourite and 2 is your least favourite) according to how you would like tourism to exist in the Tarkine.

Option 1: please mark you preference, where 1 is your favourite and 3 is your least favourite
Preference: ________

Option 2: please mark you preference, where 1 is your favourite and 3 is your least favourite
Preference: ________

Chief Investigator: Dr Anne Hardy
Anne.Hardy@utas.edu.au
Ph: 03 6226 7687
SURVEY FOR DOMESTIC VISITORS TO THE TARKINE, cont.,

Option 3: please mark your preference, where 1 is your favourite and 3 is your least favourite

Preference: __________

4. Are there other options you would prefer to see?
____________________________________________________________________________
____________________________________________________________________________

7. On a scale of 1 to 5, please indicate your preference for visiting the following types of attractions during your visit to Tasmania.

<table>
<thead>
<tr>
<th></th>
<th>Not at all interested</th>
<th>Slightly interested</th>
<th>I don’t have an opinion on this</th>
<th>Very interested</th>
<th>I am only in Tasmania to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature based locations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>History and cultural sites</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Fine wine and food locations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Art and cultural attractions</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

As part of our study, we are looking at two other locations: the Bay of Fires and Bathurst Harbour. Would you support the same level and style of development in all three of these locations?

a ☐ Yes. If Yes, why?
____________________________________________________________________________
____________________________________________________________________________

b ☐ No. If No, why?
____________________________________________________________________________
____________________________________________________________________________

c ☐ Unsure. If Unsure, why?
____________________________________________________________________________
____________________________________________________________________________
SURVEY FOR DOMESTIC VISITORS TO THE TARKINE, cont.,

10. In your mind, do these 3 regions differ in any way?

_______________________________________________________________________________

11. Have you been to these areas?

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tarkine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bay of Fires</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bathurst Harbour</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. Now that we have talked about natural tourist destinations in Tasmania are you more likely to go visit them now?
   a □Yes.
   b □No.

13a. If the destination we have just discussed was developed according to your preferences would you be more likely to visit it?
   a □Yes.
   b □No.

14. How long do you intend to stay in Tasmania _________________ days

15. In what age bracket do you fit?
   a □14-20
   b □21-30
   c □31-40
   d □41-50
   e □51-60
   f □61 plus

17. In what state do you live?
   a □Victoria
   b □New South Wales
   c □Queensland
   d □Northern territory
   e □South Australia
   f □Western Australia
   g □Tasmania
SURVEY FOR DOMESTIC VISITORS TO THE TARKINE, cont.,

18. Are you now in paid employment?
   a ☐Yes, full time, If yes, please go to Q  19
   b ☐Yes, part time, If yes, please go to Q  19
   c ☐No, retired
   d ☐No, students
   e ☐No, looking or work
   f ☐No, home duties,
   g ☐No, do no work
   h ☐Other: ______________

19. What is your day time occupation?
   a ☐Professional (Director, doctor, lawyer etc.)
   b ☐Other professional (Nurse, teacher, policeman)
   c ☐Manager/business owner (general Manager, head, partner, proprietor)
   d ☐Sales Person/shop worker/ office worker (Clerk, receptionist)
   e ☐Skilled or semi-skilled worker (electrician, carpenter, waiter, apprentice)
   f ☐Other manual worker

2c. If you have any other comments about the current state of tourism in the Tarkine, please let us know.
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

END of SURVEY FOR DOMESTIC VISITORS TO THE TARKINE
Appendix D: Photos used in Q Sort

<p>| | | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1</td>
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<td>25</td>
</tr>
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<td>2</td>
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</tr>
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<td>3</td>
<td>15</td>
<td>27</td>
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<td>4</td>
<td>16</td>
<td>28</td>
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<tr>
<td>12</td>
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</table>
Hub Acknowledgements

The Landscapes & Policy Research Hub is supported through funding from the Australian Government's National Environmental Research Program and involves researchers from the University of Tasmania (UTAS), The Australian National University (ANU), Murdoch University and the Antarctic Climate & Ecosystems Cooperative Research Centre (ACE CRC), Griffith University and Charles Sturt University (CSU).

Scientific leadership and contributions are from a consortium of schools from these organisations including: UTAS Centre for Environment, UTAS School of Geography and Environmental Studies, UTAS School of Economics and Finance, Murdoch University School of Veterinary and Life Sciences, The ANU Fenner School of Environment & Society, ACE CRC Climate Futures, UTAS School of Zoology, UTAS School of Plant Science - Environmental Change Biology Group, Griffith University Griffith Climate Change Response Program and CSU Institute for Land and Water Society.

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