FEASIBILITY STUDY

Investment in Ben Lomond Skifield Northern Tasmania

Acknowledgements

The Feasibility Study for Ben Lomond Skifield has been prepared by TRC Tourism Ltd (www.trctourism.com) for the client which includes Northern Midlands Council, Launceston City Council, Department of State Growth, the Ben Lomond Committee, Northern Tasmania Development, Tourism Northern Tasmania, Tasmanian Parks and Wildlife Service, and Regional Development Australia (Tasmania).

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Executive Summary

The Ben Lomond skifield is located in Ben Lomond National Park in Northern Tasmania. It is the state's only commercial skifield and provides opportunities for the community and visitors to the region to participate in a range of snow based activities including beginner and intermediate skiing and snowboarding, tobogganing, and snow play.

There only a handful of small ski areas like Ben Lomond left in Australia. Costs asscociated with snow making equipment, facilities, services and insurance has resulted in the consolidation of smaller ski areas into larger resorts.

The small ski areas that remain viable generally have the following characteristics:

- a sole operator and provider of all snow area services (parking, lifts, ski hire, instruction, food & beverage) giving control and management of customer service and the guest experience
- clear market positioning as beginner and family snow experience area
- reliable low cost snow making
- intensive summer grooming
- reliable water supply to support snowmaking
- low operating costs and affordable lift ticket prices
- long term leases that give certainty to the business operators and investors.

The Ben Lomond ski season is often short, hampered by unreliable snow cover. It continues to experience seasonal challenges that have been overcome through snowmaking in other small ski areas in Australia, New Zealand and elsewhere. The continued reliance on natural snow falls and two snow making guns to support skifield activities is no longer considered viable. Despite attempts by ski area operators to secure small amount of grant funding to extend snowmaking in the skifield, little investment has occurred in recent years. The lack of investment is symptomatic of the level of uncertainty associated with return on investment given the highly intermittent nature of snowfall and and whether the skifield has the potential to become a key driver for tourism growth in the traditionally low tourism season.

In order for Ben Lomond skifield to successfully compete in today's competitive marketplace as a snow destination and support tourism growth to the region, it will need to "*guarantee*" snow and reposition itself as an exciting value for money snow experience for 6-8 weeks of the year for families and young people.

Participation in snow sports in Australia is, at best, keeping up with national population trends. High quality, value for money snow play experiences continue to remain popular. In light of these trends, any investment in the Ben Lomond skifield must be realistic and pragmatic and focussed on improving the offer to those who are most likely to find it appealing.

The goal should be to establish a sustainable beginners snow play destination with similar features of other viable ski aeas in Australia and New Zealand.

Initially investment should focuss on infrastructure that supports the development of a new revitalised snow play experience that:

- specifically targets the intrastate visitor market - families and young people
- increases the number of visitors who return to the ski area annually
- increases the length of stay in the region by offering a new range of activities in the ski area
- increases visitor spending opportunities to support local businesses
- raises the profile of Ben Lomond National Park.

Investment in the order of $1.3 million to $1.8 million is required to achieve this outcome. Invesment consists of:

- additional snowmaking
- a revitalised snow play experience with magic carpet and snow tube park
- intensive summer grooming to maximise snowmaking effort
- increased water supply and energy capacity
- a new walking track that takes visitors to the Legges Tor from the village
- signage and interpretation and new visitor amenities; and
- integrated marketing.

This level of investment is beyond the capacity of current operators. Whilst investment from local skifield operators should contibue to occur, the lease/licence arrangements will need to be restructured to attract new investors.

Revitalised facilities must be designed to meet today's alpine industry criteria and service standards, comply with current safety and building codes. Establishing a "champion" or "investment leader" to enable investment to develop infrastrucutre that meets these standards is considered fundamental to offering a consistent, high quality snow experience that generates sufficient demand to drive investment in other ski area services.

The likley impact on visitor numbers as a result of the required investment has been estimated according to high, medium and low growth scenarios. Under a high growth scenario total annual visitors increase to 65,247; 58,261 under a medium growth scenario; and 55,636 under a low growth scenario in 2021.

Based on the various growth scenarios, regional spending would increase from $3.6m in 2015 to $5.4m under a high growth, $4.3m under medium growth $4m under a low growth scenario.

It is estimated that a total of 22.3 local jobs were generated by visitor spending in the winter season in 2015 and 36.6 jobs were generated by visitor spending in non-winter periods. It is estimated that this would increase with visitor growth to 33.1 jobs under a high growth scenario; 26.5 jobs under a medium growth scenario and 24.6 jobs under a low growth scenario by 2021.

Total regional income associated with visitors would increase from: $3.6 million in 2015 to income in $4.8m under a high growth scenario, $4.2m under a medium growth scenario and $4.0 under a low growth scenario by 2021..

In the event that the recommended capital improvements are not made, visitor numbers would be likely to fall over the period to 2021 and local jobs would decline.

Investment of $1.8 million in the Ben Lomond Skifield will provide a major tourism and recreational product of state significance, capable of generating new and complimentary tourism investment in Northern Tasmania and contributing to the economic growth of the wider region.

Contents

1 Introduction

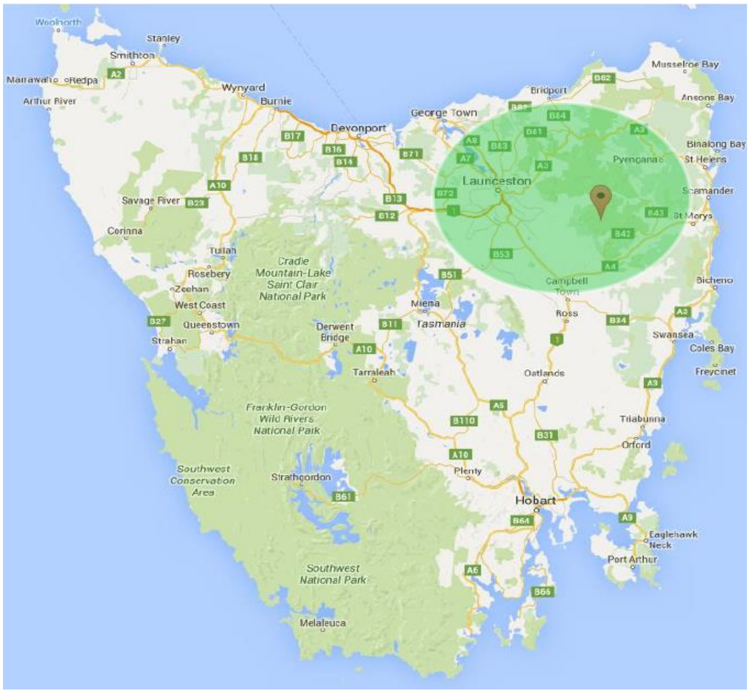
1.1 THE BEN LOMOND SKIFIELD

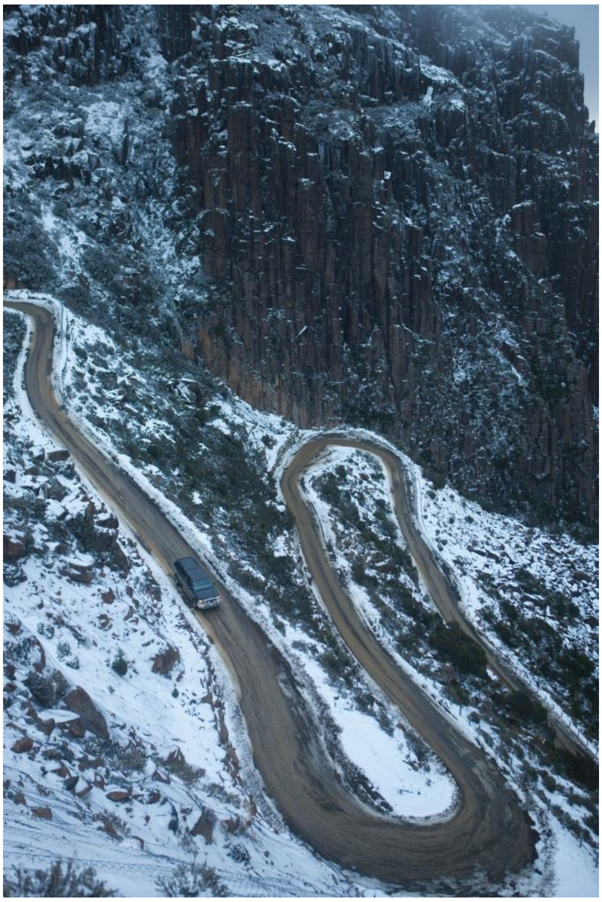
The Ben Lomond Skifield is a small ski area situated on a spectacular mountain plateau between 1,460 and 1,570 metres above sea level in Ben Lomond National Park south east of Launceston in northern Tasmania (Figure 1). The skifield is about a one hour drive from Launceston and a three-hour drive from Hobart.

Being the only commercial skifield in Tasmania it provides limited opportunities for beginner and intermediate skiers and snowboarders and facilities for tobogganing, snow play and socialising.

It has 7 ski tows (T-Bars and Pomas) and ski runs with limited fall and length (no greater than 100 metre fall and 500 metre length) and a ski village consisting of a car park, a day shelter and amenities, a cafe, equipment hire and ski instruction, a hotel and club lodges with a total bed capacity of 500 (Figure 2).

Figure1: Location of the Ben Lomond Skifield



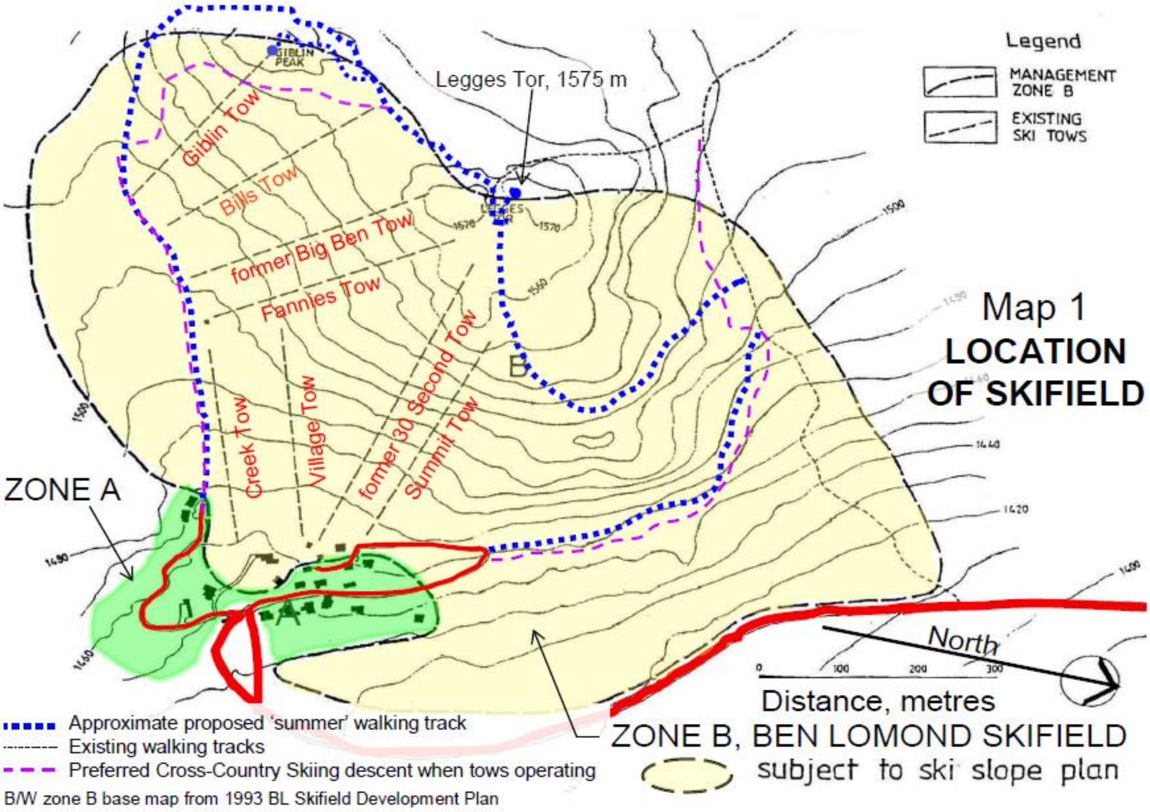


Close to the city of Launceston and its many visitor assets, Ben Lomond National Park is located in a region with heritage towns and properties, several national parks and nature-based attractions, local produce, outdoor adventure activities and touring routes. It is also an emerging cycling and mountain biking destination stimulated by recent investment, infrastructure and promotion.

Outside of the cooler months, rock climbing, alpine walking and road touring are popular activities in the Ben Lomond National Park.

The Ben Lomond ski season extends from early July to late September but is often much shorter, hampered by unreliable snow cover which makes the extent of the ski season unpredictable. The retention of snow on the slopes has been a problem due to a decrease in snow falls and the rate of snow melt on exposed rocky terrain. In recent years, two snowmaking guns have been installed on the front slopes of the beginners ski area. While there are a number of cross country skiing routes marked by snow poles, the unreliability of snow cover also means the general mountain area is little used for cross country skiing. The continued reliance on natural snow falls to support ski field activities is no longer considered a viable option, as over time, the skifield will not be able to operate.

Figure 2: The Ben Lomond Skifield area



Little investment has occurred in the skifield in recent years due to the level of uncertainty within both the private and public sector about whether return on investment will be realised and if the skifield has the potential to become a key driver for tourism growth in the traditionally low tourism season.

This uncertainty stems from contrary views on whether:

- the mountain's altitude, topography, rainfall and terrain challenge the technical feasibility of achieving consistent snow coverage across the winter season
- improving the beginners' skiing and snow play experience will increase visitation sufficient to warrant additional investment. In particular, winter offerings on the Australian mainland and New Zealand are competitive, and Tasmania's small population means intra-state patronage may never be high enough to justify extra investment.

1.2 FEASIBILITY STUDY

This feasibility study aims to clarify the sustainability of Ben Lomond Skifield as a financially viable, seasonally reliable, beginner to low/intermediate ski and snow play destination. It seeks to confirm if Ben Lomond can offer consistent snow cover during the ski season and generate sufficient visitor numbers to justify investment.

The report aims to answer the following questions:

a) Would infrastructure and associated developments, above and below ground, contribute to a more reliable and longer snow season?
b) Would a more reliable and longer snow season attract sufficient increased tourist visitation and spend in the region generally, and alpine businesses specifically, to warrant expenditure on the infrastructure and associated developments and ongoing operating costs?
c) Taking into account a) and b) what other tourism offerings would significantly enhance Ben Lomond National Park as a year-round destination?

1.3 METHODOLOGY

The preparation of the feasibility study has involved three stages as outlined below.

Literature Review

This stage of the project involved a review of the relevant plans and strategies relating to economic development, tourism and specific recreation activities relevant to the ski field area, Ben Lomond National Park and the region. These reports were reviewed to identify any specific recommendations relating to proposed infrastructure developments or other relevant opportunities.

Site Analysis and Consultation

The consultants undertook a field trip in August 2015 to assess the skifield and to consult with stakeholders. During this period conditions were optimal with ample snow cover. Consultations were undertaken with the Ben Lomond Committee, Tasmanian Parks and Wildlife Service, local and State Government representatives, regional tourism organisations, accommodation providers and business operators in the ski field. The primary focus of the consultation process was to gather information relating to the study area and identify issues, opportunities and aspirations of the local business community.

Assessment of development opportunities and report preparation

The next stage of the project involved analysing and compiling the findings from the previous stages of the project into a draft report for consideration and discussion with key stakeholders. The draft feasibility study was finalised following feedback from the Steering Committee which is made up of representatives from Ben Lomond Steering Committee, Parks and Wildlife Service, Regional Development Australia (Tasmania), Northern Development Tasmania, Northern Midlands Council, Launceston City Council, Tourism Northern Tasmania and State Growth

1.4 REPORT STRUCTURE

The remainder of this report is structured as follows:

Section 2	provides an overview of the regional context including an overview of tourism to Ben Lomond National Park and the region
Section 3	presents a summary of Ben Lomond Ski Field and visitor experience
Section 4	presents an analysis of other ski fields in Australia and elsewhere and key market trends affecting snow based recreation and tourism to the region
Section 5	presents a summary of the challenges and opportunities for the ski field and priority investment requirements. This section also includes the indicative costs of investment
Section 6	presents the findings from the cost benefit analysis of investment and includes an assessment of the net community benefits and the economic impacts on the local economy
Section 7	presents a summary of findings and recommendations

2 Regional Context and Tourism Demand

Ben Lomond National Park is located within the boundaries of Northern Midlands Council (pop 12,500) and is zoned national park under the Northern Midlands Interim Planning Scheme 2013. The park is managed by Tasmanian Parks and Wildlife Service under the *National Parks and Reserve Management Act* 2002. The Council collects rates from the lessees and licensees in Ben Lomond Skifield although it does not provide direct services to them.

Launceston is the largest regional city in Northern Tasmania (pop 143,000) and is a major point of entry for visitors and trade to the State. Launceston City Council have an interest in the development of the skifield as it manages part of the road infrastructure that services the area and is a tourism asset for the community. The region is serviced by Launceston airport, with Launceston being an integral part of the principal air-route network for south-eastern Australia.

Both Northern Midlands and Launceston Councils have a clear commitment to tourism as an important pillar of their economic development as seen throughout local planning, economic development and community plans that set out local priorities and development opportunities.

2.1 REGIONAL AND STATE STRATEGIES

Economic development in Northern Tasmania is focused on addressing two challenges:

» creating job opportunities (Northern Tasmania's unemployment rate sits at 8.2% which is well above both Tasmania's rate of 6.6% and Australia's rate of 6.3%.)

» improving Northern Tasmanians' standard of living[1].

The Northern Tasmania Regional Futures Plan (RFP) seeks to raise the economic profile of the region, seek new opportunities for economic development in the region, and make more effective use of resources in promoting regional economic development. The RFP identifies the pillars of the Northern Tasmanian economy[2] as:

» food and agribusiness

» tourism

» advanced manufacturing.

Northern Tasmania's tourism products, experiences and destinations are recognised as having key roles to play in contributing to delivery of the $2.05billion annual spend target by interstate and international visitors in Tasmania by 2021.

2.2 TOURISM TO THE REGION

Overview

Northern Tasmania received 2.4 million visitors in 2014/15[3]. Intrastate visitors (Tasmanian residents) comprise 81% of total annual visitation (see Table 1), the vast majority (67%) being day trippers. Interstate visitors comprise 16% (368,000) of total visitors and there is a small international visitor component (3.4%). The estimated 702,000 annual domestic overnight visitors comprised 30% of total visitation to Northern Tasmania in 2014/15 (refer Table 1)

Interstate, international and overnight intrastate visits and nights have all grown strongly since 2012, with day visitors also showing 1.6% per annum growth. Growth in interstate visitor nights has been strong over the period however there have been falls in international and intrastate visitor nights (despite the growth in overall visitors), indicating shortening average lengths of stay (ALOS).

Between 2012 and 2015, Northern Tasmania's market share of the State's visitation has remained broadly constant at 32.5% (0.5% growth).

[1] Northern Tasmania Regional Futures Plan Discussion Paper June 2015

[2] Ibid

[3] Sourced from Tasmanian Visitor Survey (interstate overnight), the International Visitor Survey (IVS) and the National Visitor Survey (NVS) (day visits, intrastate overnights). All data is for the year ending March 2015.

Seasonality

As would be anticipated, Northern Tasmania exhibits strong levels of seasonality in trading patterns. For overnight visitors 64% of visitation is between November and April, while for day visitors, November and December is the peak period (25% of visitors)[4]. June and September are the quietest months for day and overnight markets presenting an opportunity to Ben Lomond skifield to grow visitation during this time (refer Figure 3)

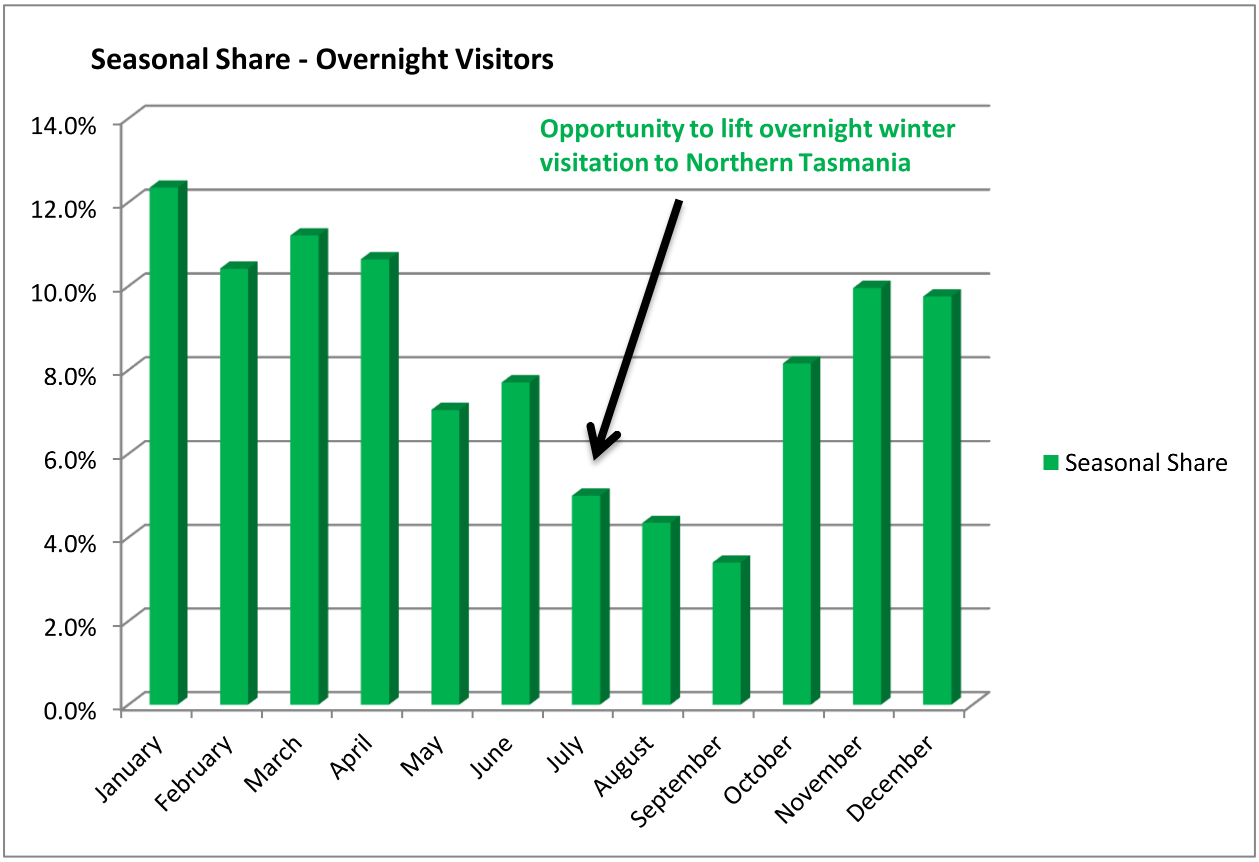
Key characteristics of visitors to Northern Tasmania and relevant to Ben Lomond Skifield are presented in Table 2 and detailed in Appendix 1.

Table 1: Annual Visitation to Northern Tasmania, year ending March 2015[5]

Visitors	Numbers	% change between March 2012 and March 2015	Nights	% change between March 2012 and March 2015
Intrastate Day	1,589,895	+6.4%	-	-
Intrastate Overnight	333,965	+11%	616,381	-10.2%
Interstate Overnight	367,890	+23%	4,884,455	+25%
International	79,691	+50%	797,740	-2.7%

[4] Source from IVS, NVS All data is for the year ending March 2015.
[5] Sourced from Tasmanian Visitor Survey (interstate overnight), the International Visitor Survey (IVS) and the National Visitor Survey (NVS) (day visits, intrastate overnights). All data is for the year ending March 2015.

Figure 3: Seasonal Share - Day and overnight visitors to Northern Tasmania



2.3 OVERVIEW OF VISITOR CHARACTERISTICS

A summary of the key characteristic of visitors to Northern Tasmania is presented in Table 2.

Table 2: Key market characteristics

	Intrastate visitors (day and overnight visitors) account for the majority of visitors to the region - 81% 1.6 million Tasmanian residents made a day visit to the region in 2014/15 334,000 Tasmanian residents stayed overnight in the region 367,890 interstate visitors and 79,691 international visitors account for approximately 3% of visitors.
	Northern Tasmania's market share of the State's visitation has remained steady in the last 3 years Day visitor volume has grown by 6.4% since 2012 International visitor numbers have doubled since 2012 however; there has been a 3% decrease in nights in the same time period Interstate visitors and nights have grown by 23% and 25% since 2012
	The region has a strongly season tourism trading pattern – for overnight visitors, 64% of visitation is between November and April
	China, Hong Kong, USA and UK account for half of all international visitors – Chinese visitor numbers have grown by 250% since 2012 Victoria and NSW are the key interstate source markets - 64% of interstate visitors
	Older visitors love Northern Tasmania– the 50+ age group is the largest for international; day and interstate visitors Overnight domestic visitors tend to travel as families with children or as older couples. Couples with no kids are our largest single grouping
	Nearly 4 in 10 overnight visitors use hotel accommodation Nearly 20% of visitors stay with friends and relatives
	78% of visitors take part in outdoor and other activities - 64% of visitors take part in bushwalking and other walks and 52% of overnight visitors, visit national parks
	Less than half of the visitors who travel the driving routes in the region, stay overnight for at least 1 night

2.4 VISITORS TO BEN LOMOND NATIONAL PARK

Accurate visitor data for Ben Lomond National Park is limited. The most recent estimate from the Tasmanian Parks and Wildlfe Service (PWS) indicates that Ben Lomond National Park receives anywhere between 30,000 and 49,900 visits per annum, most of which visit during winter[6] (refer Appendix 1). The direct relationship between visitation and snow conditions can be seen in the PWS vehicle counts from 2012. Put simply, when there is snow, visitors arrive. Outside the snow season around 630 vehicles a month or 20 a day visit the mountain. Assuming an average of two persons per vehicle the out of season visitation could be 40 persons per day[7].

Skier Days at Ben Lomond Ski Field

The 2010 Ski Slope Plan indicates that visitation to Ben Lomond had declined in the previous 17 years, mainly in winter. The reasons cited by visitors for this trend included unreliable and poor snow cover, inaccurate snow reports, queues, tow breakdowns and unreliable operating times, short runs, relative cost, cheap airfares and packages to resorts with reliable snow and better facilities. Ageing of skiers who had previously used the skifield was also reported.

The skier day history of the resort which has been supplied to the Australian Ski Areas Association (ASAA) by Alpine Enterprises P/L shows a very unreliable skier day history[8].

Table 3: Ben Lomond Skier Days

2004	2005	2006	2007	2008	2010	2009	2011	2012	2013	2014	2015
13,000	3,000	0	1,000	0	0	3,000	0	3,000	0	No data	No data

To put the above into some perspective the Australian ski resorts ski a total average of approximately 2.2 million skier days per season (approximate average for past 5 seasons)[9]. Hence Ben Lomond Skifield receives at best less than 0.5% of the total.

[6] Estimation of visitation to the park and skifields is based on traffic counters and car counts conducted by park staff. The visitation record is unreliable and has gaps due to malfunction of the under-road traffic counters

[7] Groupwork, Ben Lomond National Park Tourism Feasibility Study 2012

[8] Note that the data on skier days have not been validate by the ASAA and are to be used with caution

[9] Australian Ski Areas Association 2015 – Unpublished

Market characteristics of winter visitors

The majority of winter visitors are from Tasmania including around 49% from southern Tasmania and around 48% from Northern Tasmania[10].

Snow Sports rental data for 2015 winter season[11] indicates that 49% of visitors were from North, North East and East Tasmania; 17% from the North West; and 18% from Southern Tasmania, suggesting that there has been a reduction in the number of southern based visitors over the last 15 years.

While only a small proportion of visitors to Ben Lomond are from interstate and other countries, anecdotal data suggests that this proprotion is increasing. For examle, snow sports rental data for the 2015 winter season[12] indicates that 8% of visitors were from interstate and 3% were international visitors which means around 12% of visitors to Ben Lomond ski field in 2015 were not from Tasmania.

Ben Lomond skifield operators have also noted that that the majority of winter visitors are families enjoying snow play activities, beginners, intermediate skiers and snow boarders and club members who traditionally visit during winter. Other trends that the operators have noted inlcude:

- » an increase in day visitor numbers i over the last 3 years
- » an upward trend in young adults interested in downhill sports requiring uphill tows eg snowboarding
- » local families and lodge members were traditionally the main customers but local lodges are struggling to maintain visitor numbers due to better value propositions for families at Australia's mainland alpine resorts as well as overseas resorts
- » around 5% of intrastate visitors are making repeat visits. Families with school age children are the main group undertaking repeat visits. It is important to note that this equates to 95% of visitors who are not coming back to the skifield , representing growth potential to win them back with a more compelling product offering.

[10] A survey conducted by the Ben Lomond Ski field Management Authority in 2000

[11] Data collected from Snow Sports Rental Hire Information 2015 from 2,133 rental cards

[12] Ibid

Awareness of Ben Lomond National Park

According to the 2014 Community Monitor (refer Appendix 1) awareness of Ben Lomond National Park with Tasmanian residents is high, however visitation is low:

» 65% of Tasmanian respondents to the survey said they were aware (knew about) the Ben Lomond National Park

» awareness was highest nearby in the Launceston and North East region:

- 59% of respondents living the Hobart region were aware of Ben Lomond
- 59% of respondents in the South East region were aware
- 76% of respondents in the Launceston and North East region were aware
- 66% of respondents in the West and North West region were aware

» Ben Lomond was one of the most well-known parks or reserves in the region – along with Freycinet National Park, the Bay of Fires, Maria Island National Park and Friendly Beaches

» although awareness was high, the number of Tasmanians visiting Ben Lomond was much lower

» Only 9% of Tasmanian residents who had been to a National Park or reserve in the previous 12 months went to Ben Lomond

» Ben Lomond is not the only park or reserve where awareness is high but visitation is relatively low – for example, 63% of Tasmanians are aware of the Mole Creek caves, but only 11% visited in the previous 12 months

» However, when thinking only about parks and reserves in the east region, Ben Lomond is regionally important. Of the Tasmanians who had been to a park or reserve in the East Region in the previous 12 months, Ben Lomond was ranked fourth after Freycinet, Bay of Fires and Friendly Beaches

» Residents who lived nearby were, not surprisingly, more likely to have visited Ben Lomond

- 12% of residents who lived in the Launceston North East region (who had visited a park or reserve in the previous 12 months) had been to Ben Lomond; compared to only 6% of residents who lived in the South East region of Tasmania.

2.5 KEY CONSIDERATIONS RELEVANT TO BEN LOMOND SKI AREA

» The intrastate market is currenlty the primary market for Northern Tasmania. This will continue to be the case.

» Growth in interstate and international visitors is likley to be consistent with growth from these markets to Tasmania as a whole.

» Northern Tasmania is attractive to the family market (parents with children), specifically Launceston and Northern Midlands.

» These markets are trending toward a decreasing length of stay

» The region experiences low overnight visitation in the winter months (June –September) .

» The high rates of awareness of Ben Lomond by the intrastate market indicate that this market has the potential to grow.

» The skifield presents an opportunity to offer high quality low-cost snow based experience for families and increase the length of stay in the region.

» Ben Lomond already has a market from which to draw - existing visitors are predominately from intrastate and are likely to have some established connection and more likely to return for a snow experience if the offering is appealing.

» Ben Lomond is the only commercial ski area in Tasmania. The only other ski area in Tasmania is at Mount Mawson in Mount Field National Park which is a small club field operated by the Southern Tasmanian Ski Association which cannot compete with the Ben Lomond ski area.

» Nature based tourism is a popular activity which presents an opportunity for the ski area and Ben Lomond National Park to increase length of stay in non-winter periods.

» Ben Lomond's' proximity to Launceston means it is well placed to leverage new visitors and extend length of stay if a high quality snow based experience is offered in off peak periods.

» Visitors are demanding more sophisticated product with food and accommodation offerings that appeal to their market segment.

» The most popular activities across the holiday types are bushwalking, visiting National Parks, tasting Tasmanian food and wine and visiting historic sites. These activities are compatible with what Ben Lomond has to offer.

» Tourism growth is a focus point of both State and Federal Government priorities due to its value adding potential.

3 Ben Lomond Skifield

3.1 BEN LOMOND NATIONAL PARK

Ben Lomond National Park is an alpine plateau over 1500 metres high and visible from much of Tasmania's north. The plateau is roughly 14 kilometres in length, 6 kilometres wide and is in excess of 1300 metres in height. A summit on the plateau named Legges Tor is the second highest point in Tasmania (1572 metres). Jacobs Ladder, a steep and narrow section of road with striking features including dolerite columns and scree slopes is a spectacular feature of the drive to the plateau for visitors.

The Ben Lomond National Park is invaluable for the conservation of the flora communities and species diversity of Tasmania's alpine areas and is an important asset for the Tasmanian community. The area consists of an outstanding variety of glacial and periglacial features which are considered of national significance. The main values of the skifield and nearby areas are summarised in Appendix 2.

The Ben Lomond Skifield occupies part of the park's alpine landscape that has been modified over at least 80 years by skiing and associated developments and, to a lesser extent, by summer recreation.

The Northern Tasmanian Alpine Club formed in 1929 and pioneered trips to the mountain and improved the access track. In 1932, a chalet was built at Carr Villa and construction of a road from Upper Blessington to Carr Villa began soon after. It was finally completed in 1953.

In 1950 a Parliamentary Standing Committee recommended that Ben Lomond be developed as a ski resort. The Australian National Championships were held at the site in 1956. In 1963 the access road was extended to the top of the plateau via the steep and scenic "Jacobs Ladder". Subsequent developments have included ski lifts, visitor facilities, a licenced hotel and accommodation, sewerage system, and improved access. The skifield has historic heritage that is considered of social value to the skiing community and other park users.

3.2 BEN LOMOND SKIFIELD

Management

The PWS assumed the role of managing authority for the skifield from the former Ben Lomond Skifield Management Authority in 2007. PWS also manages the surrounding Ben Lomond National Park.

The PWS is responsible for road infrastructure, snowclearing operations and management of sewage treatment plant and water supply. It also owns four buildings one of which is leased for ski hire / snow sports operation, one to house the ski patrol, a public day shelter and a garage/workshop. Skifield businesses (including the ski lifts, equipment hire, and accommodation) are operated under lease or licence from PWS with varying terms. PWS allocates $120k per annum[13]. to support winter operations. This allocation includes some revenue from park entry fees collected from the mountain. PWS focuses on critical infrastructure issues such as road access, sewerage, water supply and the day use shelter. There is no direct expenditure on the slopes of the ski area.

Northern Midlands Council collects rates from each ski field business which are calculated by property assessed annual value (AAV) multiplied by a rate of 6.2 cents in the dollar. A minimum charge applies of $211 plus state fire levy of $38 (total $249). Total revenue retained by council is estimated to be approximately $15, 000 per annum[14]. There is no direct expenditure by council in relation to the ski field operation.

The total revenue collected on average from the Club lodges for base rental, shire rates and sewerage and water services is very low on a per bed basis compared with mainland alpine resorts.

The club / lodge and business operators at Ben Lomond have formed the Ben Lomond Committee which acts as a lobby group for Ben Lomond skifield and seeks to coordinate promotion of Ben Lomond, an events program and mountain operations. It operates a website (benlomond.org.au) which includes snow and weather reports and skifield information.

[13] Pers comms PWS 12 August 2015
[14] Email advice from Northern Midlands Council, Corporate Services Manager 24 August 2015

Ski Slope Plan

The *Ben Lomond National Park Management Plan 1988* zones the area for skifield development activities which encompasses the existing ski village and ski infrastructure and most of the snowfields suited to downhill skiing. This Zone includes the Meadow Vale catchment except for about 25 hectares in the vicinity of Hamilton Crags which is the only known Australian location of the Rock Cushion Plan (known as *Chionohebe ciliolata* or *Veronica ciliolata*) listed as vulnerable under the EPBC Act and Tasmania's *Threatened Species Protection Act 1995*. The Skifield Development Area Zone is intended to provide for coordinated development of skiing and other visitor activities and facilities throughout the year while protecting the areas natural and heritage values. It is also intended to be the site of the park's principal visitor and management services and facilities.

The 1988 Management Plan requires that detailed management of the skifield be guided by a Skifield Development Plan that must be compatible with the prescriptions in the Plan of Management. The *Ben Lomond Ski Slope Plan* in 2010[15] is a framework for long term ski slope and associated infrastructure and visitor services development and management. It assesses the existing conditions and infrastructure and proposes measures to achieve improved use, development and management of the slopes and winter and summer visitor activities taking account of the protection of the environment and heritage, the marginal snow conditions, and the aim to provide affordable visitor experiences. Proposals in the plan include:

- providing more reliable snow cover through summer slope grooming and winter snow farming and snow grooming
- further trialling and assessment of snow making (by commercial interests)
- a more reliable and enjoyable snow experience through ski tow capacity increases and improvements for tobogganing, tubing and snow play and development of a terrain park
- construction of a vehicle service route to minimise environmental impacts and reduce maintenance costs
- short walking tracks for summer visitors.

The ski slope plan provides a comprehensive program of works that can be undertaken by business enterprises in the ski area. Other than the installation of snowmaking and minor summer slope grooming maintenance activities, few of the recommendations have been implemented as it relies on resourcing by commercial operators and volunteer assistance. In the absence of a major commercial operator to drive investment, implementation of the ski slope will continue to be slow.

3.3 SNOW COVER

According to the 2010 Ski Slope Plan snowfalls from 2 to 25 millimetres are common, but heavier falls (which could lay down a deep snow pack) occur less frequently. Snow deposition on the slopes is also adversely affected by frequent strong winds. There is no systematic snow depth monitoring, but the 2010 Ski Slope Plan identifies that total winter snow fall is unlikely to exceed 2 metres. The retention of snow on the slopes is affected by melting during warmer days (including the warming effect of solar radiation on the many rocks in the area) and winter rainfall.

A 2007 study found that snowmaking is feasible at Ben Lomond with most nights from late June until late July reaching the required conditions (low temperatures). The Ski Slope Plan permitted a formal trial of snowmaking which commenced in 2010. Details of when and how often snowmaking occurred are not available although anecdotal feedback suggests that it has occurred intermittently over the years as conditions have allowed and when there has been sufficient water.

No detailed modelling of future climate change related snow cover changes has been conducted for Ben Lomond Skifield.

The 2010 Ski Slope Report draws on the results of a 2006 report by the CSIRO and Hydro Tasmania[16] that concluded that climate change would minimally affect Tasmania up to 2040 due to the moderating effect of the Southern Ocean. The report predicted that north-east Tasmania would experience warmer winter temperatures of about 1°C by 2040, which translates into an annual maximum temperature rise of 0.2 to 0.3°C at Ben Lomond.

[15] Parks and Wildlife Service (2010), *Ben Lomond National Park Ski Slope Plan*, Parks and Wildlife Service, Department of Primary Industry Parks Water and the Environment, Hobart.

[16] CSIRO, Hydro Tasmania and the Tasmanian Partnership for Advanced Computing (2006), *Report on Climate Change in Tasmania*.

Modelling of Tasmania's climate change trends was also conducted in 2010 for the Climate Futures for Tasmania project. That report concluded that Tasmania would experience rises in mean annual temperature during the 21st century, but at a lesser rate than for the Australian and global predicted temperature increases. Daily minimum temperature is projected to increase more than daily maximum temperature.

Changes in climate are not a unique concern for Ben Lomond Skifield. All ski areas across the world including mainland Australia have a real concern regarding climate change. The average number of temperature windows that are suitable for ski areas to make snow are shortening in duration. Improvements in technology have however largely mitigated this concern to date.

The implications of these predicted changes for snow falls on Ben Lomond Skifield are not known. As there is no Bureau of Meteorology data specifically for Ben Lomond National Park or the skifield, data from nearby sites has been utlised, recognising that Ben Lomond could have its own unique weather conditions. Estimates are:

- Between 1976 and 2015 the average 9 am & 3pm relative humidity for Ben Lomond area was between 60 & > 90%, slightly higher than rest of snow covered Australia. Minimum temps in Ben Lomond area increased by 0.6 degrees C in last 35 years
- The temperature needs to be below minus 2.5 wb (or @ 90% rh) to be able to make snow. Snow can be made at higher temperatures with lower levels of production
- In Australia most snowmaking takes place with a relatively high RH level as, due to the effect of cold air drainage, cold air gets heavier and RH levels generally increase the colder the air gets. It is quite normal to have RH levels of 70% - 80% during snowmaking operations in Australian resorts
- Potential frost days (less than minus 2 degrees) are: 8 in June, 12 in July, 7 in August which means that Ben Lomond will have around 25 snowmaking days per annum. Given that snowmaking days does not necessarily cover a full 24 hr period there are likely to be weather windows in which conditions are right for snowmaking over around 8 weeks.

3.4 SNOW PLAY AND SNOW SPORTS TERRAIN

The designated toboggan/snow play area is on the front slope of the skifield area. Most of the toboggan area is prone to thin snow with rock hazards and the area is not groomed or shaped for tobogganing. There is little area available for general snow play that is safe and away from toboggan and ski/board activity and when snow is available activity is concentrated in this small area.

There are 7 ski tows (T-Bars and Pomas) and ski runs with limited fall and length (no greater than 100 metre fall and 500 metre length). It should be noted that some of these lifts have had little usage over the last ten years with one or two lifts having had virtually zero usage in that time.

Most grooming has been superficial and obstacles are present throughout the snow sports area. Rocks, bushes and water present holes or cause snow to break under the snow user even under good conditions. These items present safety hazards for visitors as recognised in the ski slope plan.

The lack of slope grooming is one of the major concerns of all interested parties and is a must for the future of the operation. Even with approvals in place for more grooming to take place it has not eventuated due to a lack of funds or volunteer labour and materials to carry out the approved work.

3.5 COMMERCIAL ENTERPRISES

Three commercial enterprises operate in the ski field: Alpine Enterprises Ski Tow Service, Ben Lomond Snow Sports and Ben Lomond Alpine Hotel.

Interviews conducted with each of the operators indicated that profitability is variable depending on snow. A lack of co-ordination regarding investment and mountain operations is a major issue. Each operator felt that other operators were competing with the small number of visitors to Ben Lomond which causes tension. There was general agreement that a new management structure that invested, marketed and co-ordinated all on mountain operations would be preferable..

All operators indicated that investment was required in the following areas for the snowfield to remain viable:

- Snowmaking and increased water supply capacity to support it
- Summer slope grooming and snow fencing
- Branding and marketing
- Reticulated energy supply.

Alpine Enterprises Ski Tow Service

The ski tow company reported that the business historically requires between 4 - 6 weeks operation per season to break even. If the ski field is fully operational more than 70% of visitors to the mountain use the tows. In a poor season this reduces as tobogganing and snow play increases. The operator indicated that there is an expectation by other commercial enterprises and clubs in the village that the lifts will continue to operate throughout the season regardless of conditions.

The ski tow operator is reliant on snowmaking noting that Alpine Enterprises are joint asset owners of snowmaking infrastructure together with Ben Lomond Snow Sports.

In 2014 the operator traded for 3 days due to lack of snow.

The enterprise employs 10 casual staff:

- 2 maintenance staff
- 6 ski lift operators
- 1 ticket seller
- 1 owner/manager.

The variability of snow means staff can only be employed casually – in a good season the business may employ up to 22 casual staff. Regardless of the season full time staff are asked to commit to a 6 day week.

To increase the level of certainty, the operator indicated that an increase in snowmaking is required to provide a consistent and reliable snow experience to visitors.

The lift ticket prices for Ben Lomond are comparable to other similar small resorts on the mainland such as Baw Baw ($75 Day weekend, $25 midweek).

Table 4: Ben Lomond Ski Lift Ticket Prices 2015

2015 Lift ticket costs (benlomond.org.au)
ADULT (18-64) Day – $65 Afternoon (from 12.30) – $40
SENIOR (65-69) Day – $50 Afternoon (from 12.30) – $35
JUNIOR (13-17) Day – $45 Afternoon (from 12.30) – $30
CHILD (7-12) Day – $30 Afternoon (from 12.30) – $20
The young (Under 7) and the young at heart (70 and over) FREE
School Groups of 10 or more SECONDARY Day – $35 PRIMARY Day – $25
Value Season: 6th June to 21st June 2015 and 31st August to 6th October 2015
Peak Season: 22nd June to 30th August 2015
Adult: 16 to 65 Child: 8 to 15 Senior: 65+
Multi day passes run over consecutive days only
Half day passes are valid between 8:30am to 12:30pm or 12:30pm to 4:30pm

Ben Lomond Snow Sports

Ben Lomond Snow sports operate the snow sports hire and lessons, café, shuttle services. Snowsports are joint asset owners of the snow making facilities, together with Alpine Enterprises. Snowmaking is undertaken with two snowguns. The estimated cost to run the snow guns is $500 per night and the capacity to expand snowmaking is currently limited due to water supply.

The shuttle service is offered to guests on peak days when the car park is full and for overnight guests who leave their vehicle in the overnight carpark. Two troupe carriers are used to transport guests (each one licenced to carry 10 passengers).

The business employs up to 5 full time equivalent (FTE) during snow season (including owners), but varies with snow cover. The operator indicated that employing full time qualified ski instructors is challenging due to short and unpredicatable snow season.

The operator also runs a snow grooming service although there is insufficient snow to undertake grooming without risking damage to equipment and the slopes.

It should be noted that to have a non-lift operator providing both the snow making and lessons is highly unusual in Australia and most ski resorts around the world.

The Ben Lomond Alpine Hotel

The Ben Lomond village offers a total of 500 beds divided between the Ben Lomond Alpine Hotel and 15 club lodges. The main accommodation open to non-members is the Ben Lomond Alpine Hotel. The Ben Lomond Alpine Hotel is the only regular provider of year-round accommodation, having established summer trading for the first time in 2014/15. It provides 6 motel cabin rooms (double bed plus one bunk bed) and 3 lodge suites (one double bed) with shared facilities[17], and is geared more to adults than children. The hotel is fully licenced and operates a restaurant, cafe and tavern. The operator reports good occupancy in the summer period with variable occupancy in winter. The operator reports that club lodges offering accommodation to non-members and lack of co-operative marketing are impacting on occupancy rates in winter.

Other Accommodation

There are 15 club lodges in Ben Lomond ski field area ranging in bed capacity. Ten lodges have bed capacity of over 20 beds, the largest being 73 beds.

The Northern Tasmania Alpine Club operates two lodges – The Lodge which has a capacity of 68 people in lodge rooms with shared facilities and Frederick Smithies Lodge which accommodates 34 people in 4 self-contained units. Guests must supply their own linen. The lodges are available to members and their guests year round and are also available for large group bookings for clubs, corporate groups and schools[18].

Rovers Ski Lodge accommodates 66 persons in rooms with shared facilities. It is open to non-members on payment of a nominal affiliate membership fee of $1 a season and is also open to school groups[19]. While normally closed out of the ski season, Rover Ski Lodge opens in summer for not for profit groups and organisations.

It is understood that winter accommodation occupancy is high on Friday nights and weekends during good snow conditions with lesser mid-week occupancy. Lodge operators have commented that there is scope for the existing lodges to take on more guests.

It should be noted that there is a major conflict between the commercial accommodation provider and the other club lodges providing accommodations to non-club members and friends.

It is essential if Ben Lomond is to continue to improve and move forward that all available accommodation in Ben Lomond is available for any visitor to be able to book.

3.6 MOUNTAIN ACCESS AND PARKING

Entry to Ben Lomond National Park (as with all Tasmanian national parks) requires a valid entry permit. Day passes are available in the village or online from PWS. Annual park passes can also be purchased from the PWS or Service Tasmania.

Ben Lomond Road, an 18 km unsealed mountain road, provides access to the village from the main road (C401) between Blessington and Mathinna. The road is subject to snow and ice on the winding upper reaches (known as 'Jacobs Ladder') requiring the use of snow chains which must be carried by all vehicles from June to September. Alternatively winter visitors can leave their vehicles at the national park entry station and use a shuttle bus service (run by Ben Lomond Snow Sports) to the village.

Commercial operators are reliant on good access for visitors, staff and supplies to access the mountain. Consultation with operators indicates that the road clearing operations are mostly reliable although during the heavy falls experienced in July 2015 slow clearing operations did not commence until 6am resulting in delays for visitors to access the mountain.

Commercial operators also indicated their dependency on the shuttle service during the peak periods to get guests on and off the mountain quickly each day and the limited capacity of the shuttle service was frustrating.

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[17] www.benlomondalpinehotel.com.au
[18] www.ntac.org.au
[19] roverskiclub.com

3.7 PEDESTRIAN ACCESS AND CIRCULATION

Visitors can park in the designated parking area in the village area to walk to snow sports hire, lifts and accommodation. Club lodges are permitted to use skidoos to transport members and supplies to the lodges in winter.

Signage around the village is limited and there are no formed/groomed paths for visitors in winter making access around the village difficult and dangerous during snow melt.

Apart from the boarded walk to Snow Sports, tracks in and around the ski area range from very rough to marked routes. There is limited signage/interpretation and wayfinding signage is very poor. Pedestrians often wander onto the southern skiing slopes, some with toboggans and are often asked to leave the downhill slopes for safety reasons.

3.8 PUBLIC SHELTER AND TOILETS

A day shelter approximately 400 meters from the ski field base area provides the only public toilets for visitors to Ben Lomond. This is an awkward walk for parents with small children and skiers/boarders. The shelter is owned by PWS and maintained in winter under contract.

3.9 OTHER MOUNTAIN SERVICES

Food and beverage offering for visitors is limited to the Ben Lomond Alpine Hotel and Snow Sports cafe. There are no grocery supplies available in the village. There are limited retail /souvenirs available for visitors.

3.10 UTILITIES

The Ski Slope Plan outlines the current state and capacity of utility infrastructure servicing the village. Of particular note is the limitations on water supply and electricity which will impact on the future viability of the ski field with respect to snowmaking.

Water Supply

Water is currently supplied by a 900m^3 dam located on Big Ben Creek. The capacity of the dam is approximately 0.9 ML with a maximum wall height of 2.7 metres[20]. The storage is the main water supply for domestic purposes within the village. Water is gravity fed from the storage to the various dwellings. No treatment of the water is undertaken as the water is of very high quality.

The domestic water usage requirements for the Ben Lomond Village are not known but are generally quite low. However, during peak visitor times the water usage for the village increases for short periods of time. During these periods water usage for snowmaking is closely monitored.

A report on water availability from the Ben Lomond Village water supply storage for snow making purposes was undertaken in 2011[21] as a requirement of the 2010 Ski Slope Plan. The report concluded that the existing supply was sufficient to provide for a small amount of snow making which has been undertaken since that time (2 guns).

The report recommended that before the allocation of water for any additional snow making (as outlined in the Ski Slope Plan) water flows in Big Ben Creek will need to be accurately monitored to determine if there was sufficient supply. It was recommended that water monitoring should occur once a week during the winter period and each day during the snow making period. It was also recommended that the village should be metered to gain a better understanding of the village's average and maximum water requirements.

Despite the recommendations in the report, it is understood that monitoring has not occurred. Anecdotal evidence suggests that the dam has been drained on a few occasions during snowmaking confirming that additional capacity will be required to enhance snowmaking in the ski field.

Without increase water supply and/or extra storage that can be made available for increased snowmaking it will be near impossible for Ben Lomond to continue or to offer an improved product.

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[20] Taswater Consulting Pty Ltd Ben Lomond Ski Field Water Assessment Report for Snow Making Proposal May 2011
[21] Ibid

Energy Supply

Energy is supplied via diesel and gas and there are a few solar panels and small petrol generators. Gas is widely used for light, cooking and heating and most electricity is diesel generated. The current situation is not considered optimal as servicing and delivery is difficult in winter, is noisy and presents a number of OH&S and environmental risks to business operators.

The ski slope plan indicated that grid electricity would be a preferred option at an estimated cost of up to $5 million. This is no longer considered feasible, and a more pragmatic approach would be reticulated gas (via large tank) and electricity via a common generator. This could be further investigated.

3.11 WALKING TRACKS

There is no defined track to Legges Tor from the car park or Village. The Carr Villa Track from the north ends at the top of Summit Pass near Bills Tow. In the extreme north of the Ski Slope a rough track runs from the road to the Carr Villa Track near Ben Bullen. An unsigned runs to the East from the plateau road to a small waterfall on the Ben Lomond Rivulet.

3.12 KEY POINTS

» The skifield has historic heritage and social value to the Tasmanian skiing community and other park users and with little investment in recent years it is becoming an asset liability for Government.

» PWS is the managing authority and individual businesses are charged rates by Northern Midlands Council despite there being no services provided.

» The ski area operates through individual business operations that are loosely co-ordinated through the Ben Lomond Committee. This is not the optimal arrangement.

» The current situation where the lift operator does not control snow making, snow grooming and the ski school is highly unusual in Australian and most ski resorts around the world.

» The *Ben Lomond Ski Slope Plan* in 2010[22] provides a solid framework for long term ski slope and associated infrastructure and visitor services development and management, however implementation has been slow and investment limited.

» The ski area suffers from infrequent snowfall over the winter period, making it unreliable for visitors and operators.

» Some snowmaking has been installed however, additional snowmaking is required to guarantee a beginner/intermediate ski/board and snow play experience.

» It is estimated that snowmaking is considered feasible for around 8 weeks of the year. The water supply will require augmentation for this to occur. Detailed assessment is required.

» The lack of slope grooming is one of the major concerns of all interested parties and is a must for the future of the ski area to ensure natural and artificial snow is retained and the risk to visitors is reduced.

» All operators indicated that investment was required in the following areas for the snow field to remain viable:

  - Snowmaking and increased water supply capacity
  - Summer slope grooming and snow fencing
  - Branding and marketing
  - Reticulated energy supply

- Conflict between the commercial accommodation provider and the other club lodges providing accommodation to non club members and friends needs to be addressed.
- All available accommodation in Ben Lomond needs to be available to visitors to maximise occupancy and provide benefits to visitors and businesses.
- Visitors and commercial operators depend on a reliable and efficient shuttle service during peak periods to get guests on and off the mountain quickly each day.
- Improvements to visitor amenities in the ski area (signage, toilets, walking tracks, interpretation) could greatly improve the visitor experience.
- Individual gas and diesel generators impact on the operation of the resort and the visitor experience. Reticulated gas from a large gas tank and electricity supply from a common generator would greatly improve the environmental, OH&S, operational issues currently experienced by individual businesses.

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[22] Parks and Wildlife Service (2010), *Ben Lomond National Park Ski Slope Plan*, Parks and Wildlife Service, Department of Primary Industry Parks Water and the Environment, Hobart.

4 Other ski areas and key market trends

4.1 AUSTRALIA

Australia, in common with many other parts of the world, has experienced a decline in the number of small ski resorts and the consolidation of facilities into larger resorts. Costs asscociated with snow making equipment, facilities, services and insurance now expected by the market are possible reasons.

Operational ski resorts that were members of the Australian Ski Areas Association have reduced from thirteen resorts in 1987 to six resorts currently. This has included the consolidation of the Perisher Smiggins, Guthega and Blue Cow resorts in NSW into the Perisher resort and the consolidation of Falls Creek, Mount Hotham and to a degree Dinner Plain resorts in Victoria under a single operator. Several small club skifields such as at Mount Field in Tasmania are managed by volunteers.

Small resorts are under enormous pressure to continue to exist. In the USA / Canada, where many of these ski fields have simply discontinued to operate, the local community / town/ city or county have stepped into operate these resorts as community assets that provide employment for youth, sporting activities and cultural reasons.

Small resorts in Australia are clearly under similar pressures as other ski areas around the world. Australian ski resorts operate under some of the most marginal conditions in the world combined with the highest cost pressures, such as labour, cost of all imported equipment, from ski lifts to skis and clothing. Further, the cost of conducting a business in Australia's regulated and legalised environment is high in comparison to other places.

Mt Selwyn NSW

- Selwyn is one of Australia's most successfully small resort operations.
- This is largely due to its simple structure (one company, one operator, one lease), the right investment into snowmaking at a time when infrastructures costs were lower. A very well run operation which also hadthe benefit of a large secondary supplement business that were complimentary to each other (this will no longer be the case).
- Highly regarded for snow making knowledge and commitment to invest.
- The rates are listed below and offer a much greater value than Ben Lomond. Selwyn offers a great product largely based on 100% snowmaking.
- Both summer and winter groomed runs, great snow play and tube park.
- It is a simple day resort with great facilities.
- Currently the resort has a lease term of approx. 12 years remaining with the NSW NPWS which is concerning to the current operator as it makes any capital ongoing investment questionable.

Table 5: Selwyn Snowfield Ticket Prices[23]

	Value Season		Peak Season		All Season	
	Adult	Child	Adult	Child	Senior	7 & Under
1/2 Day	$57	$31	$75	$42	$36	$7
1 Day	$66	$36	$88	$48	$42	$12
2 Days	$127	$70	$169	$93	$80	$22
3 Days	$179	$99	$245	$134	$116	$32
4 Days	$221	$121	$310	$169	$147	$40
5 Days	$251	$137	$356	$195	$170	$47

Charlotte Pass NSW

- Very similar to Mt Selwyn, however this small resort is managed under a head lease by the NSW NPWS and provides services such as sewage and water and access and commercial licences for other third parties.
- The main concern for the current head lessee is the lease period has effectively run out, which means there has been little investment in recent times.

Mt Baw Baw Victoria

- Baw Baw still continues to operate largely due to the continued funding by the Victoria Government.
- The operating model has changed from a resort management board model to a commercial operator who has been contracted by government to operate the Baw Baw resort.
- This model is fully underwritten by the Victoria state government at a cost of between $2 million - $3 million per annum.

Lake Mountain Victoria

- This small snowplay and cross country ski facility, which historically was operated by government, is now operated by a third party commercial operator. The new operator also took over the operation of a new large base facility which the government developed and funded. It is managed on a relatively short agreement with funding from both the government and revenue returned from the operation of the facility.
- Lake Mountain is largely dependent on artificial snow for its snow play area. Its cross country operation is dependent on natural snow and is infrequently open.

Mt Buffalo Victoria

- No longer operates summer or winter due to a lack of Governmental investment. It became uneconomical due to a total lack of services, no mains electricity and limited water supply.
- Mt Buffalo had at its peak 53,000 skier days in 1986.

4.2 NEW ZEALAND SKI AREAS

New Zealand ski areas are following a similar trend with the larger commercial ski areas growing such as Coronet Peak and The Remarkables in Queenstown and Mt Hutt in Methven, Canterbury. These three ski areas are owned and operated by NZSki Ltd (NZSki). Extensive capital investment in recent years has considerably upgraded the infrastructure at all three mountains. This has been complemented by investing heavily in staff, snowmaking, grooming, transport and ski and snowboard hire to ensure that the guests' experience is the best it can possibly be. Coronet Peak, Mt Hutt and The Remarkables ski operational season is normally from early June to mid October.

Porter Ski Area is about to undergo a major expansion with new investors assuming finance is secured.

There is a declining number of skier days on Whakapapa Ski Area and steady performance on Turoa Ski Area - both of which make up Mount Ruapehu, the biggest ski area in New Zealand.

[23] Selwynsnowfields.com.au

The smaller ski areas and club fields are staying afloat with variable commercial results. Round Hill at Lake Tekapo has been closed for several years. Rainbow Ski Area near Nelson Lakes National Park, 1.5hrs from Nelson is a small field owned by a community trust and operates with a small surplus after the community purchased it from the previous owner. Most other club fields on the Craigieburn Range (Mt Cheeseman, Broken River and Craigieburn), Mt Olympus and Temple Basin are still operating independently by ski clubs. Some ski clubs in the North Island are struggling with decreasing membership. Club fields largely are under great pressure to continue to survive.

4.3 KEY LEARNINGS RELEVANT TO BEN LOMOND SKI AREA

The critical success factors for small ski areas across Australia and New Zealand are:

- a sole operator and provider of all snow area services (parking, lifts, ski hire, instruction, food & beverage) giving control and management of customer service and the guest experience
- clear market positioning as beginner and family snow experience area
- reliable low cost snow making system that guarantees a snow experience
- intensive summer grooming maximises snowmaking effort and tops up thin snow cover
- reliable water supply is required to support snowmaking
- low operating costs and affordable lift ticket prices
- continuous investment resulting in reliable lifts and excellent beginner to intermediate skiing products
- coordinated/integrated marketing of snow experience across the ski area and embedded in destination marketing for the region
- long term leases that give certainty to the business operators and investors.

4.4 MARKET TRENDS AND DEMAND DRIVERS

Participation rates in snow sport activities

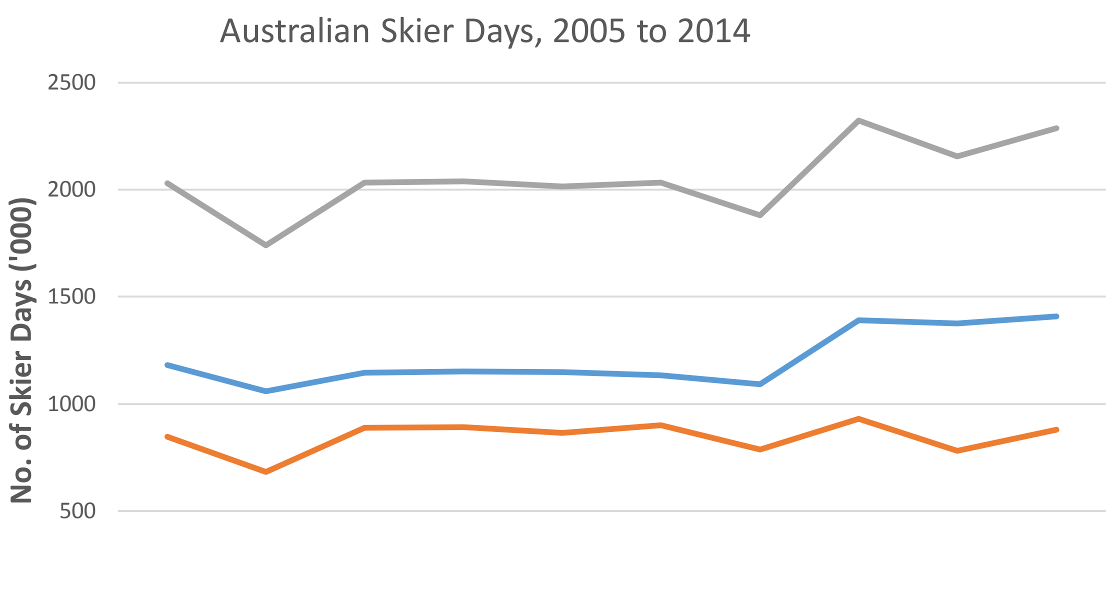
The Australian Bureau of Statistics estimated that 0.8% of Australians participated in ice/snow sports in 2011-12[24]. The figure for Tasmanian residents is slightly lower at 0.7% which accounts for 3,605 people in 2015 (excludes snow play) .This is a similar participation rate to horse riding, canoeing/kayaking and squash/racquetball and a higher participation rate than a range of other physical activities including hockey, rugby league and rugby union (all 0.6%), sailing (0.4%) and scuba diving/snorkelling (0.4%). Ice and snow sports are a niche activity among Australians, with a much lower participation rate than popular outdoor physical activities such as walking (23.6%), swimming/diving (7.8%), cycling (7.6%), golf (4.8%) and bushwalking (2.4%).

Estimates by the Australian Ski Area Association of skier days (a lift ticket purchased by one person for one days' skiing) from 2005 to 2014 show variation in skiers/ boarders visiting the ski resorts in NSW and Victoria in recent years[25] (see Figure 4). However, this does not indicate the numbers of visitors who did not buy lift tickets and who may have participated in other snow-related activities such as tobogganing, snow play and cross-country skiing.

In summary figures from the ASAA indicate that participation in skiing in Australia is, at best, keeping up with national population trends and is heavily influenced by season. These trends do not account for the number of Australian residents travelling overses to participate in snow sport activities which is estimated to be at least 1 million skier days each year.

[24] Australian Bureau of Statistics (December 2012), *41770DO001_201112 Participation in Sport and Physical Recreation, Australia, 2011-12*
[25] *www.asaa.org.au*

Figure 4: Estimated skier days in NSW and Victorian Ski Resorts, 2005 to 2014



Years	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
NSW SKIER DAYS	1182	1058	1146	1150	1149	1132	1092	1391	1374	1409
VIC SKIER DAYS	847	682	887	890	865	901	787	931	781	878
TOTAL	2029	1740	2033	2040	2014	2033	1879	2322	2155	2287

Trends in Nature-Based Tourism

A 2014 snapshot by the Adventure Travel Trade Association noted that there has been a significant increase in interest in adventure tourism in Australasia since 2012 with bicycling, trekking and cultural experiences the most frequently requested activities by travellers. Adventure activities including mountain biking, bungy, ziplines, and soft-adventure sports are growing at 9-13% per annum in Australia, well above the 2-3% average annual growth rate (Tourism Research Australia, 2013). Mountain-biking has seen a 21% growth while walking has grown by only 3% since 2008.

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

Key growth areas in Australia include:

» Boutique luxury lodges and camps in remote locations
» Overnight accommodated (including luxury) walks
» Food and gourmet tourism
» Ziplines and high-ropes
» Mountain-bike trails
» Participation sports events
» Heli-touring, jet boating and rapid transport.

Events

Nationally, event participation has been growing at an average of 5.9% p.a. since 2010.The most popular event categories are food and wine, music related, garden and botanical, sport and art exhibitions. A recent survey undertaken by Tourism Research Australia suggests that events in natural settings are gaining popularity.[26] The findings suggest that event participation is strongly influenced by word of mouth recommendations, with events in natural settings such as food and wine events being more likely to be recommended than others.

Whilst Ben Lomond is not suitable to host major events, the opportunity exists to leverage off larger events occurring in the region and offer small festivals and niche events with guests accommodated in existing lodge style accommodation.

Food and Beverage

Food and wine is becoming a more significant part of Tasmania's overall tourism experience and one of the first things that comes to mind when asked about Tasmania. According to the Tasmanian Visitor Survey, there was significant growth in the number of visitors going to local food producers, wineries, breweries and distilleries during their stay in Tasmania in 2014.

Tourism Tasmania's Tourism Info Monitor (TIM) indicates that travellers are looking for the opportunity to:

» Eat fresh, locally grown food for breakfast, lunch and dinner

» Buy local produce in its various forms

» Take short drives to places of interest near the main destination

» Make the journey a part of their holiday, with 'interest' stops on the way to the main destination and the return journey home.

4.5 KEY CONSIDERATIONS

» All other commercial ski areas in Australia are managed through a sole operator and provider of all snow area services (parking, lifts, ski hire, instruction, food & beverage) giving control and management of customer service and the guest experience. Long term leases that give certainty to the business operators and investors are critical.

» Participation in snow sports is heavily influenced by season and is, at best, in keeping with national population trends.This means that investment in infrastructure at Ben Lomond should be practical and staged to achieve a reasonable return on investment.

» The first step is to ensure clear market positioning for Ben Lomond ski area to remain viable. A high quality low cost family snow experience for Tasmanian residents is recommended. The first stage of investment should focus on achieving this outcome.

» Low cost snow making system that guarantees a snow experience for a revitalised snow play /beginners area is the highest priority together with intensive summer grooming to maximise snowmaking effort.

» Non winter activities are essential for businesses in the ski area to remain viable. A new walking track that takes visitors to the Legges Tor from the village with interpretation is recommended as a minimum

» Opportunities to host small events and festivals focussed on local food/wine offerings through the year will enhance the appeal/atmosphere of the village and create and increase occupancy

» Coordinated/integrated marketing of snow experience must be embedded in destination marketing for the region to attract new visitors to the ski area.

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[26] Tourism Research Australia, 2014. Events: Drivers of Regional Tourism

5 Opportunities for Ben Lomond Ski Field

The strengths, weaknesses and potential opportunities for the Ben Lomond Ski Area are summarised in Table 6. It draws on the information presented in Section 3 and 4 and points raised during consultation with stakeholders. There are some strengths in the existing offer and a number of significant challenges to overcome if it is to become a sustainable tourism resource for the community and visitors to Tasmania.

The ski area's strengths are:

» proximity to Launceston, Devonport and 3 hours from Hobart

» established market – club lodge members and local residents

» good beginner ski slope (skiers snow borders and snow play) that are suitable when covered in snow

» road and lift infrastructure in place

» supportive regulatory framework for snowmaking and slope improvement

» located on popular touring route in summer offering some excellent viewpoints and walking tracks

» located in tourism region offering visitor services and attractions in surrounding areas

» a range of accommodation exists on the mountain with year round hotel accommodation offering food and beverage

» the product has potential to fit with Tourism Tasmania's brand.

The issues can be summarised as:

» offering a reliable snow cover to deliver on the Ben Lomond snow experience and overcome the seasonal challenges experienced by operators

» no leadership in *future proofing* the ski area in light of climate change, and changing market preferences

» an undefined visitor experience that is not owned or managed by any one entity, evidenced by the 95% of visitors that do not come back to the ski area after their first visit

» lack of brand, market positioning and integrated marketing

» lack of investment in ski lift, snowmaking and slope grooming – the three essential elements of a ski area

» lease and licence structure and tenure the current structure cannot continue if Ben Lomond is to develop and continue to invest – it needs a structure that enables one party to control and provide all services such as a head lessee

» lack of overarching investment strategy and entity driving the investment. Without investment the area will be known as a hazardous, unreliable ski area and will be positioned as such in the market place

» businesses are challenged to remain profitable in below average snow years and often close, impacting on all other businesses that are willing to remain open

» the scale of resources required to bring the infrastructure up to the standard necessary for the destination to develop, especially the capacity of water and electricity to increase snow making is beyond the capacity of current operators

» unreliable access in peak snow periods resulting in delays and safety issues for visitors

» lack of summer activities that encourage visitors to visit or return to Ben Lomond.

Table 6: Strengths, Weaknesses and Opportunities – Ben Lomond Skifield

Core Element	Strength of Ski Area	Weakness	Desired Experience	Potential Strategies to Optimise
Activities & Products	» Area is within an hour's drive of a major population centre Launceston and 3 hours from Hobart » Lifts infrastructure good with competitive lift prices » Beginner ski slope (skiers snow borders and snow play) are suitable when covered in a suitable snow cover. Location is good etc. » Views / lookouts – the main road to the village offers some excellent viewpoints » Located in tourism region offering visitor services and attractions in surrounding areas » Year round hotel accommodation and food and beverage offer » Popular touring route in summer	» Lack of reliable snow cover and reduction of non-viable season length » Contracting skier market » Increasing competition » Lift infrastructure operates on diesel fuel generators (noise, risk issues, cost) » Lack of summer slope grooming making snow activities hazardous » Products are not tailored to appeal to specific market segments » Limited signage throughout village from main entry point, shuttle drop off to main snow play areas and food and beverage areas » Lack of sense of arrival » Skiing facilities are some distance from car parking » Lack of toilets and shelter at the lifting / Snowsports base » Location of current facilities is poor » Seasonal fluctuations make operations challenging for the three small enterprises » High competitor standards	» Ben Lomond is known as Tasmania's premier *affordable snow experience* for a minimum of 6 weeks per year » Experiences on offer meet the needs and aspirations of the target markets and maximise economic benefits to local communities » First time visitors are attracted to the area to make it worthwhile - a guarantee of snow and a fun day out	» Clear positioning in market place as premium snow play area and entry point for beginner snow sports in Tasmania that offers guaranteed snow cover for 6 weeks to 8 week season, not as the slope plan suggests (12 – 16 weeks) Focus investment on: » Increasing capacity of water supply to provide limited snowmaking in beginners and snow play/beginner areas of front slopes – 2 additional guns » Reticulated energy supply that provides electrify supply to lifts » Installation of snow tube park to enhance snow play experience for families » Summer slope grooming (drainage, excavation of soil, shrubs) » Installation of snow fences » Install toilets and shelter in base area » Signage throughout village » Products are tailored to appeal to specific market segments and invite commercial operators to offer » Continual benchmarking against competitors.

Core Element	Strength of Ski Area	Weakness	Desired Experience	Potential Strategies to Optimise
Branding and marketing	» The product is a good fit with Tourism Tasmania's brand	» No clear market positioning and marketing and promotion is currently uncoordinated and confusing to visitors » The elements that contribute to making the site unique are not defined for each segment –why visit? » The area will have to compete with other activities/destinations in a competitive tourism environment - the offer will have to be compelling to appeal to locals, and interstate markets	» The ski area has a personality that evokes a set of emotions for the Tasmanian community to make it a must do and return again destination » Experiences are offered that will engage families and connect them with the snow experience	» Define core values and experiences that fit within the Regional Tourism brands. Integrate marketing effort with regional tourism boards and commercial operators » Develop cop-operative marketing strategy » Develop village events where possible » Site/park visitor use patterns (eg. length of stay, activities undertaken) are monitored » Visitor surveys are conducted regularly » The site collaborates with regional tourism authorities and marketing organisations to reach each segment
Accommodation	» A range of accommodation exists	» Limitations on ability of clubs to offer accommodation to non-members or visitors » Seasonal fluctuations » No transfer services	» Accommodation options are linked to the experiences on offer » Clubs and Commercial enterprise offer accommodation	» Establish point of difference between club style accommodation and commercial accommodation experience for visitors » Package accommodation and experiences with local operators » Provide user transfer service
Transport and Access	» Popular touring routes » Good road	» Own transport required » Limited public transport options » Snow clearing operations could be more responsive to changing conditions » Lack of road signage which makes it very hard for a first time user – where to get chains and how to fit them » Lack of info re shuttle bus - when to where etc. a lack of organised parking in lower of mountain car park » Lack of shelter etc for visitors waiting for shuttle in inclement weather.	» Reliable, service transports visitors to ski area » Road information readily available » Reliable safe road access with safe chain fitting bays in winter » Road safety information available to visitors from main sources in Launceston » Electronic signage informs visitors or road condition in winter at turn off to park » Access to the village from the overnight carpark and roadside parking on peak days is seamless	» Establish luggage transfer to accommodation » Provide Integrated booking service

Core Element	Strength of Ski Area	Weakness	Desired Experience	Potential Strategies to Optimise
Summer time activities'	» Rich stories of history of use of the corridor » Existing walking tracks » Summer trading - commercial hotel » Popular rock climbing.	» Interpretation is limited » No walking track linking village » Terrain not suitable to MTBs.	» Broad range of interpretation methods are used that appeal to target markets » Walking track links village.	» Establish walking track from village to Legges Tor » Offer a broad range of personal and non-personal interpretive products and programs.
Management	» Existing organisational model of state and local governments and Ben Lomond Steering Committee working together.	» Lack of co-ordination and investment is compromising the visitor experience » Lease/license structure limits cash flow for operators making trading challenging » Disconnect and tension between service providers as a result of management structure » No incentive for investment » Rates charged by Northern Midlands Council not invested back to village	» The coordinated organisational model supports visitor growth and provides for business enterprise.	» Establish new organisational model for management of the village and mountain operations » One head lease or mountain lease operation.

5.1 RECOMMENDATIONS AND INVESTMENT PRIORITIES

In order for Ben Lomond ski area to successfully compete in today's competitive marketplace as a snow destination it will need to guarantee snow.

Investment must be realistic and pragmatic and focussed on positioning Ben Lomond as an exciting value for money snow experience for 6-8 weeks of the year for the families and young people.

The Ben Lomond *snow play in day*[27] experience should focus on:

» the intrastate visitor market - families and young people

» increasing the number of visitors who return to the ski area annually

» increasing the length of stay in the region by offering a new range of activities in the ski area

» increasing visitor spending opportunities to support local businesses

» raise the profile of Ben Lomond National Park.

5.2 MINIMUM INVESTMENT REQUIREMENTS FOR SNOW BASED TOURISM

Snowmaking

Technological improvements have meant that snowmaking is now a much more viable option for Ben Lomond Ski area than in the past. Snowmaking technology is continuing to improve in both the production of snow in very marginal conditions and the cost associated with this production is continuing to drop.

It is estimated that 200 hours of snowmaking is achievable at Ben Lomond (based on a small number of hours of say 20 days at 10 hours per day) which would be sufficient to provide a good snowmaking base for the skifield area. This is comparable to an assessment undertaken in 2003 which indicated that snow making could occur between June and September for a maximum of around 50 days[28].

This means that with the right level of investment Ben Lomond should be able to produce sufficient snow to offer a snowplay/beginner area ski/board experience between 6-8 weeks per annum. To keep investment low, it is recommended that 2 additional snow guns be installed in a new revitalised snow play/beginners area.

Revitalise snow play experience with magic carpet and snow tube park

A magic carpet is a conveyor belt installed at the level of the snow. Passengers slide onto the belt at the base of the hill and stand with skis or snowboard facing forward. The moving belt pulls the passengers uphill. At the top, the belt pushes the passengers onto the snow and they slide away.

Magic carpets are limited to shallow grades due to their dependence on friction between the carpet and the bottom of the ski or board. Their slow speed, limited distance, and capacity confine them to beginner and novice areas. They are easier to use than T-bar lifts and Poma lifts that exist in the ski area and ideal for first time skiers.

Tubing on snow is almost always performed on a hill or slope, using gravity to propel the rider to the bottom of the grade. The rider often returns to the top of the slope with the tube to repeat the process. The low amount of friction between most tubes and snow allows tubers to reach considerable speeds while riding, especially on steep slopes. Snow grooming establishes the slopes or barriers on the periphery to guide the tubes along a safe course. Motorized pulley towlines are used to tow riders and their tube back to the top of the course after riding to the bottom.

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27 www.mtbuller.com.au/Winter/events-activities/.../**snowplay**-in-a-day

28 Taswater Consulting Pty Ltd Ben Lomond Ski Field Water Assessment Report for Snow Making Proposal May 2011

Increase water supply capacity

In order to produce more snow, the waters supply capacity in the ski area will need to be increased. Further investigation is required to determine the impact of the existing snow making operation (as required by the licence agreement) to determine the amount of additional water required and most appropriate source/storage solution. Options include desilting the existing storage to create greater capacity, increasing the height of the storage wall or establishing a new storage area.

Electricity / Gas Reticulation

It is recommended that further investigation be undertaken to install a central generator that services all businesses/lodges and replaces the individual diesel generators currently being used. IN addition reticulated gas from one centrally located single bulk storage depot will facilitate storage and distribution of gas via a reticulated service to customers in the ski area. A concept design and feasibility study for the reticulation of LP gas across the ski area and common generator should be investigated.

Shuttle Service and Shelter

To support the snow experience improved shuttle services and weather shelters will be required for visitors from the carpark during peak periods. A reliable and safe service will reduce the number of visitors using the road.

Signage and Interpretation

Improved way finding signage and interpretation for visitors to the area is required for both winter and non winter visitors. A signage and interpretation strategy is recommended prior to the installation of any additional signage to ensure it is consistent, high quality, maintained.

Snow fencing

The existing permanent and temporary fences in the ski area are very useful. It is recommended that the number of snow fences be increased to maximise snow retention in the new snow play area.

Summer slope grooming in beginner /snow play areas

Snow retention at Ben Lomond has suffered because of insufficient grooming. The installation of new snowmaking will need to be supported with intensive summer grooming as recommended in the ski slope plan.

Toilets

A new toilet facility is required closer to the snow play/beginners area. Further investigation is required regarding a suitable site.

5.3 EXPAND LODGE ACCOMMODATION OFFERING TO BROADER MARKETS

There are 500 beds available in the village with estimated occupancy at around 40% for most of the year. At present only club lodge members are legally permitted to stay in the lodge under current lease agreements. This presents an opportunity to offer the accommodation to a broader range of visitors and increase occupancy. Visitors would only be attracted to stay in the lodge style accommodation if there were a range of interesting activities to do.

Visitors are increasingly looking for opportunities to get actively involved and to learn more about significant places, try local food and wine and interact with locals. This trend is expected to continue and also presents an opportunity for Ben Lomond National park and the accommodation establishments in the ski field area.

Lodge accommodation traditionally has large kitchens and some of these could host local cooking classes leveraging the high quality regional food and wine offering with local celebrity chefs which could be appealing throughout the year.

The lodge style accommodation is perfectly suited to large groups and could host arts and crafts classes, small festivals and events in the village throughout the year.

Offering overnight accommodated walks in Ben Lomond National Park with local food gourmet offering, and highly regarded experts or thought leaders to interact with guests in lodge style accommodation could be very appealing to some markets.

5.4 CONSTRUCTION OF WALKING TRACKS

The Ski Slope Plan recommended that an easy 'dry shoe' walking loop from the village to Legges Tor should be constructed with a link to Giblin Peak. It is also recommended that signs be installed for interpretation (features like geomorphology, huts, skiing and flora) and 'way finding' to show the location of toilets, tracks, features and views. This recommendation is supported.

5.5 OUT OF SNOW SEASON ACTIVITIES

Ben Lomond National Park Tourism Feasibility Study[29] concluded that Ben Lomond National Park's altitude, scenery, walks, views, rock climbing, wildlife, the village precinct (in the ski field area), Storeys Creek and Rossarden provide a solid foundation for it becoming a year round attraction.

It recommended the development of nature-based tourism supported by heritage activities and food and beverage services. In particular it identified that Ben Lomond has international standard rock crack climbing. Rock climbing is a niche market that could attract international visitors and provide a base for a guiding business that could utilise village accommodation.

It also recommended the development of walking trails in the ski field area with possible dual use for mountain biking. Mountain biking in the plateau area is not considered feasible given the nature of the soil and the development of other areas in the region for mountain biking.

Opportunities for other non winter opportunities in Ben Lomond National Park include:

» Rock climbing events and other adventure activities

» Charity events and historic car rallies

» Road based sports events such as cycling, running festivals events

» Heli-touring involving sightseeing over region and landing on Ben Lomond Plateau.

5.6 RESTRUCTURE LEASE AND LICENCE ARRANGEMENTS

To attract additional investment beyond the current operators it is recommended that the the lease/licence arrangements be restructured. Revitalised facilities must be designed to meet today's alpine industry criteria and service standards, and be in compliance with current safety and building codes. Establishing a "champion" or "investment leader" to enable investment is considered fundamental to offering a consistent, high quality snow experience that generates sufficient demand to drive investment in other ski area services.

5.7 OTHER CONSIDERATIONS

Integrated marketing

All marketing activity associated with the Ben Lomond experience will need to be consistent with the overarching brand for Tourism Tasmania. An integrated marketing strategy that includes channels such as a high quality and media rich website that illustrates the snow play and snow sports opportunities as well as the other opportunities in Ben Lomond will be critical. The website will be an important source of information for potential visitors.

The website will need to use rich media tools (video, blogs, photos and interactive maps) to capture the imagination of visitors and entice them to visit. The website should also provide information that makes trip planning easy. This includes accommodation and transport links as well as competitive packages. Links to and from the website, visitor destinations, and Tasmania visitor attraction sites are also an important part of its function.

At the State level there needs to be a reference to the snow play/sports activities on Discover Tasmania.

The Mount Baw Baw website https://mountbawbaw.com.au/ is an excellent example of a comprehensive and well-designed website that provides alpine enthusiasts with all the information to make an informed decision about travelling to the mountain.

Social media tools like Facebook and YouTube provide a way to personalize the Ben Lomond experience and help spread the message in a relaxed and conversational way. This allows user generated content, which is arguably more credible to consumers. A Facebook page should also be created to complement the website and communicate with the market more directly.

5.8 MINIMUM INVESTMENT REQUIREMENTS

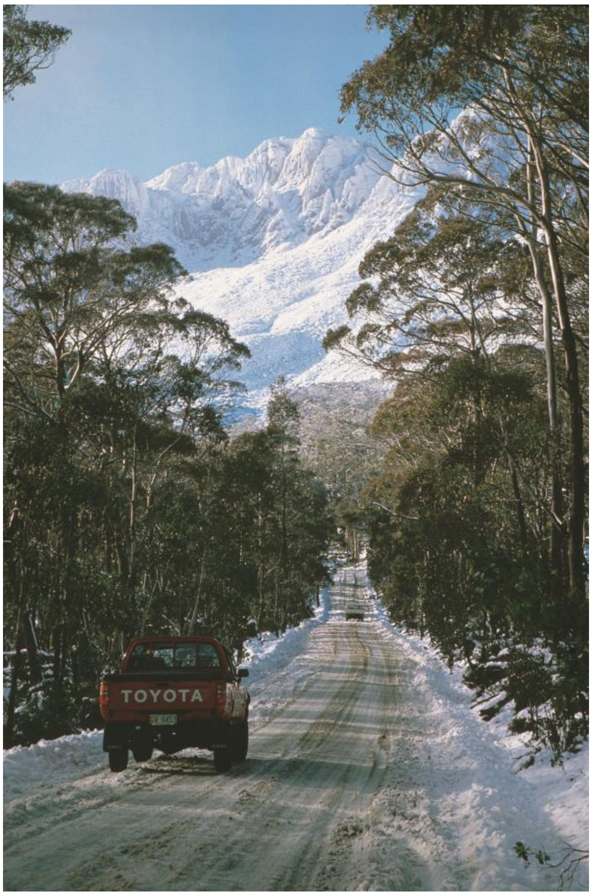
The following table lists the priority projects considered worthy of investment. These investments are considered the minimum required to ensure that Ben Lomond delivers a fun high quality value for money snow experience and summer time offering.

[29] Groupwork, Ben Lomond National Park Tourism Feasibility Study 2012

Table 7: Cost estimates for investment

Item	Rationale	Estimated capital cost	Ongoing operations and maintenance
Increase water supply capacity	To enable snowmaking	$500,000	10,000
Electricity / Gas Reticulation	To address cost, environmental, and noise issues (Note this could be self-funding)	$500,000	10,000
Install snowmaking in beginner snow play areas	To increase snow cover and double current snowmaking out put	$200,000	10,000
Install magic carpet and snow tube park in beginners area	To enhance offering to family market	$100,000	10,000
Summer slope grooming and snowfencing in beginner /snow play areas	To maximise snow retention	$100,000	20,000
Shuttle Service Shelter	Safety and convenience directed at family market	$100,000	20,000
Toilets	Visitor comfort and expectation	$100,000	$20,000
Walking Track to/from village to Legges Tor	Summer experience	$100,000	$10,000
Signage/Interpretation	Experience enhancement	$100,000	$10,000
TOTAL CAPITAL COST		**$1.8 Million**	**$120,000**
TOTAL CAPITAL COST Excluding Electricity / Gas Reticulation		**$1.3 Million**	**$110,000**

6 ECONOMIC BENEFITS AND SOCIAL IMPACT



This section examines the economic impacts of the $1.8 million (or $1.3 million) infrastructure upgrade recommended for Ben Lomond. It covers two elements:

» Construction phase: regional economic impacts of the capital works proposed.

» Operations phase: analysis of the economic impacts of potential increases in visitors covering the winter period and non-winter period.

6.1 MODELLING ASSUMPTIONS

The following tables show the modelling assumptions used in the economic impact analysis.

Table 8: Modelling assumptions

Visitor Growth

Scenarios	Winter	Non-Winter
	Growth Rate	Growth Rate
Case 1 Low	2.2% pa (11.5% over 5 years) <Growth rate for Tasmanian Tourism>	2.2% pa (11.5% over 5 years) <Growth rate for Tasmanian Tourism>
Case 2 Medium	20% growth over 5 years (3.7% pa)	15% over 5 years (2.8% pa)
Case 3 High	50% growth over 5 years (8.4% pa)	20% over 5 years (3.7% pa)

Visitor Spending

	Spend Trip	Spend Per Night
Day Visitors	$132.60	
Overnight Visitors	$476.05 (assumed average stay 2.5 nights)	$190.42

6.2 FORECAST VISITOR NUMBERS

The following table shows estimates of annual visitor numbers by category (winter and non-winter; day trips and overnight visits). The 2015 estimates from Parks Tasmania (49,900 total visitors) has been used as the base for 5 year visitor projections (2017-2021) for each of the growth scenarios.

Table 9: Visitor Number Assumptions[30]

	2010	2015	
Estimate of Visitors	**Annual Visitors**	**Annual Visitors**	**Shares**
Total (Annual)	30,000	49,900	1.00
Winter (3 months)	10,800	17,964	0.36
Non-Winter (9 months)	19,200	31,936	0.64
Winter			
Day Trips (intrastate)	8,640	14,371	0.8
Overnights	2,160	3,593	0.2
Total	10,800	17,964	
Non-Winter			
Day Trips (intrastate)	15,360	25,549	0.8
Overnights	3,840	6,387	0.2
Total	**19,200**	**31,936**	

The following charts show projections of the increase in visitor numbers under each of the scenarios. Total annual visitors increase from 49,900 in 2015 (base) to 2021 levels of:

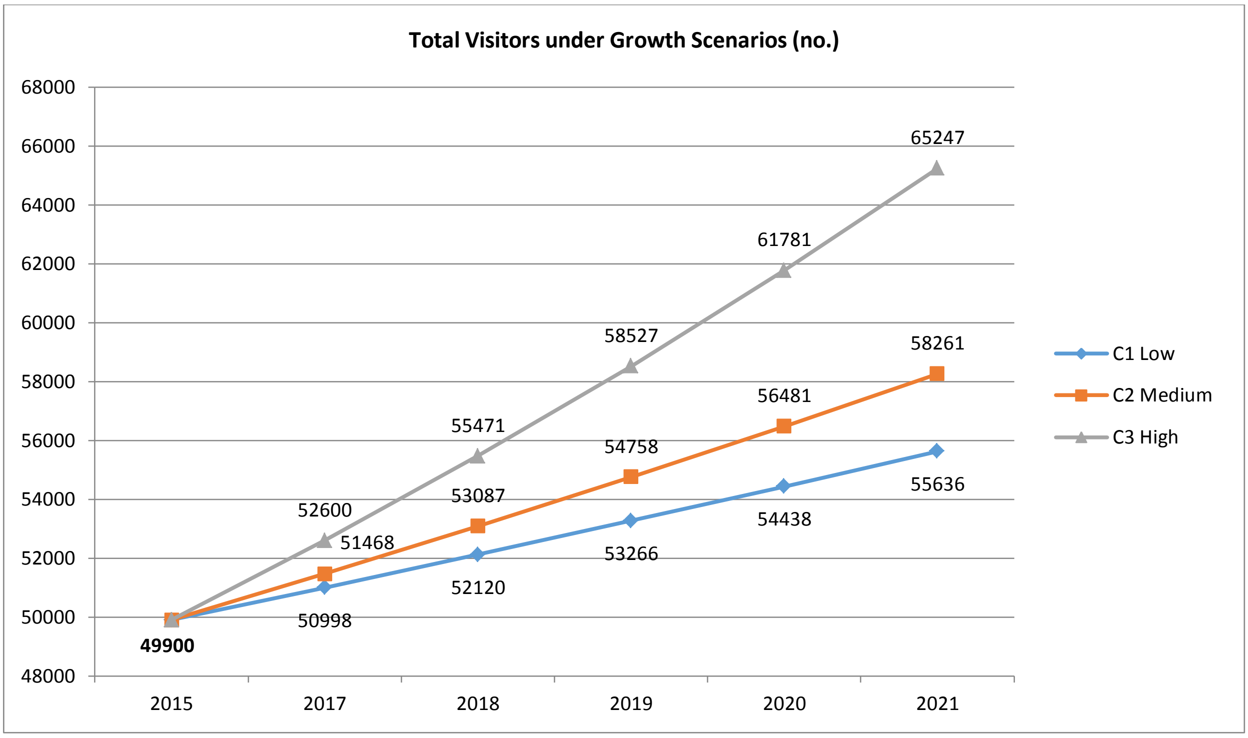
» 65,247 in 2021 under the C3 High Growth scenario

» 58,261 under the C2 Medium Growth scenario

» 55,636 under the C1 Low Growth scenario.

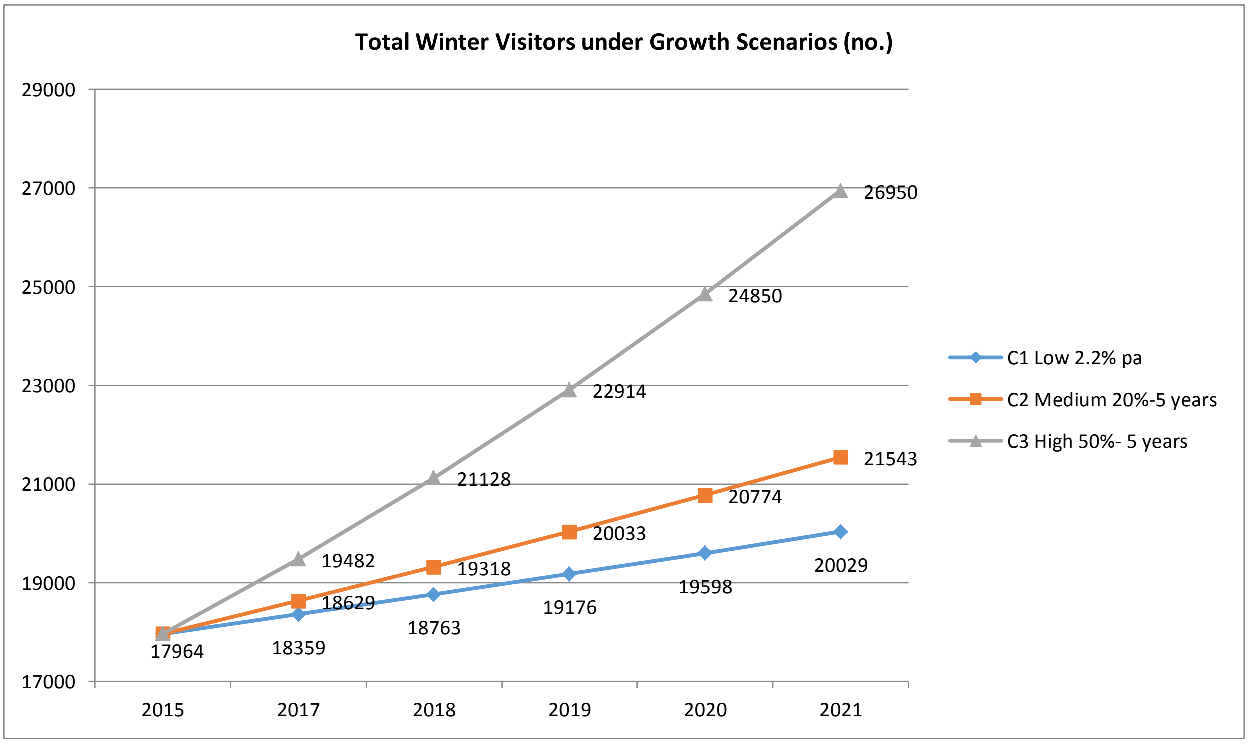
[30] Source: Parks Tasmania and MCa estimates

Figure 5: Total Visitors under Growth Scenarios (no.)



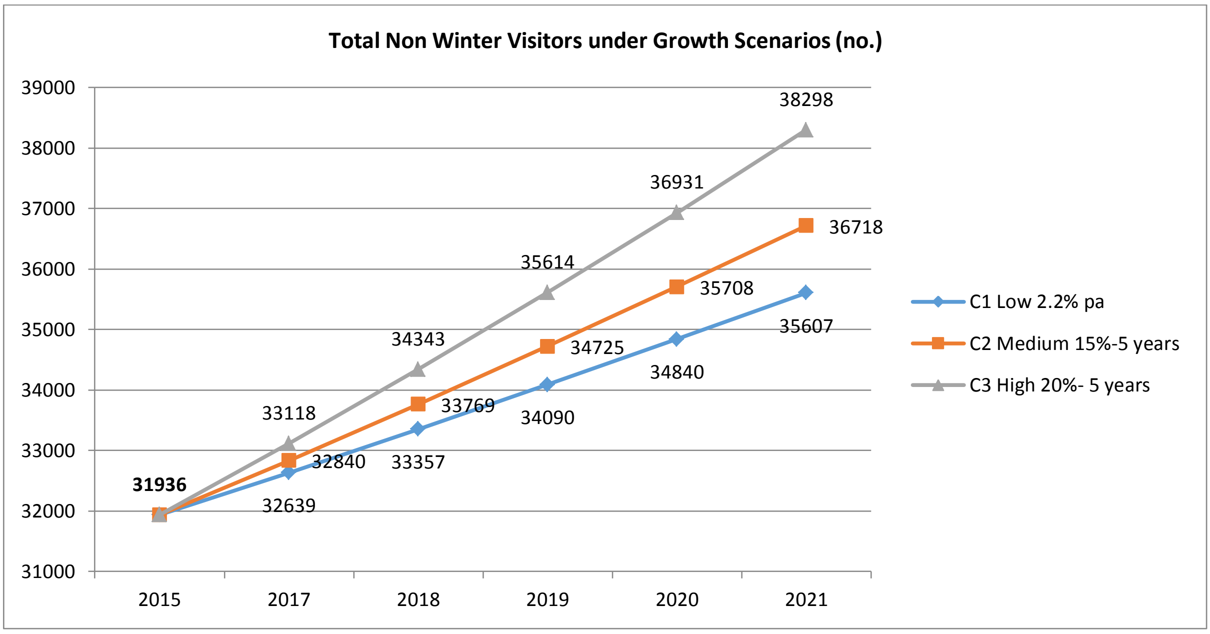
Winter Visitors: visitors in the winter season are projected to increase to: 20,029 (C1 Low), 21,543 (C2 Medium) and 26,950 (C3 High) in 2021.

Figure 6: Total Winter Visitors under Growth Scenarios



Non-Winter Visitors: visitors in non-winter periods are projected to increase to: 35,607 (C1 Low), 36,718 (C2 Medium) and 38,298 (C3 High) in 2021.

Figure 7: Total Non Winter Visitors under Growth Scenarios (no.)



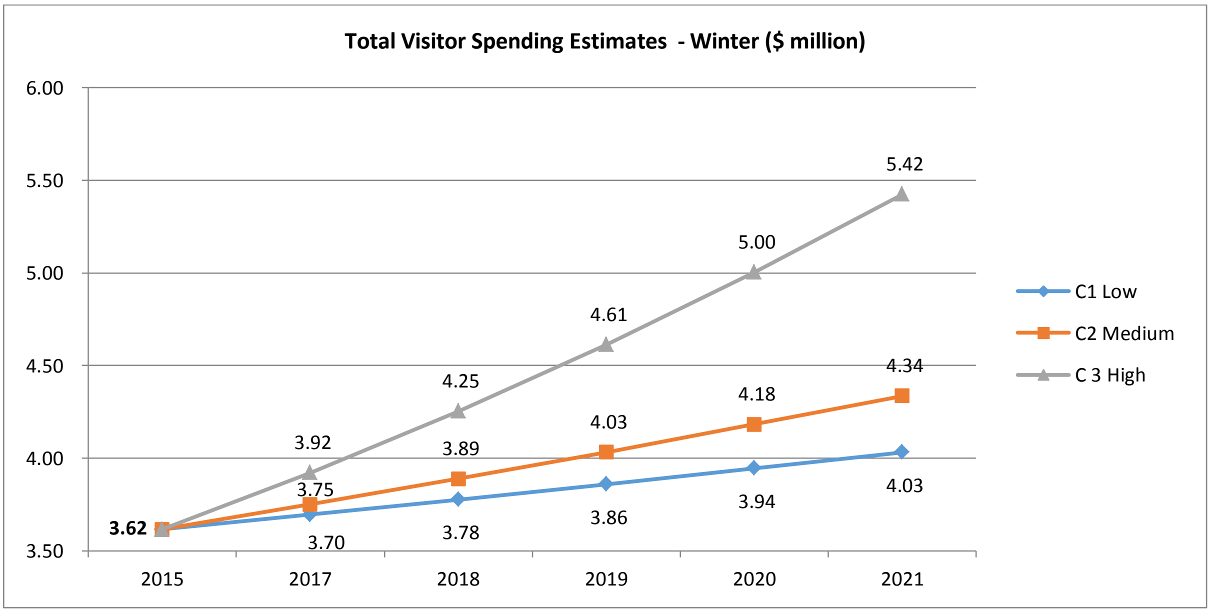
6.3 FORECAST EXPENDITURE LEVELS

The visitor scenarios have been used to estimate regional spending by visitors over the period to 2017-2021. This estimation combines visitor number estimates with of daily expenditure per person.

Winter Period

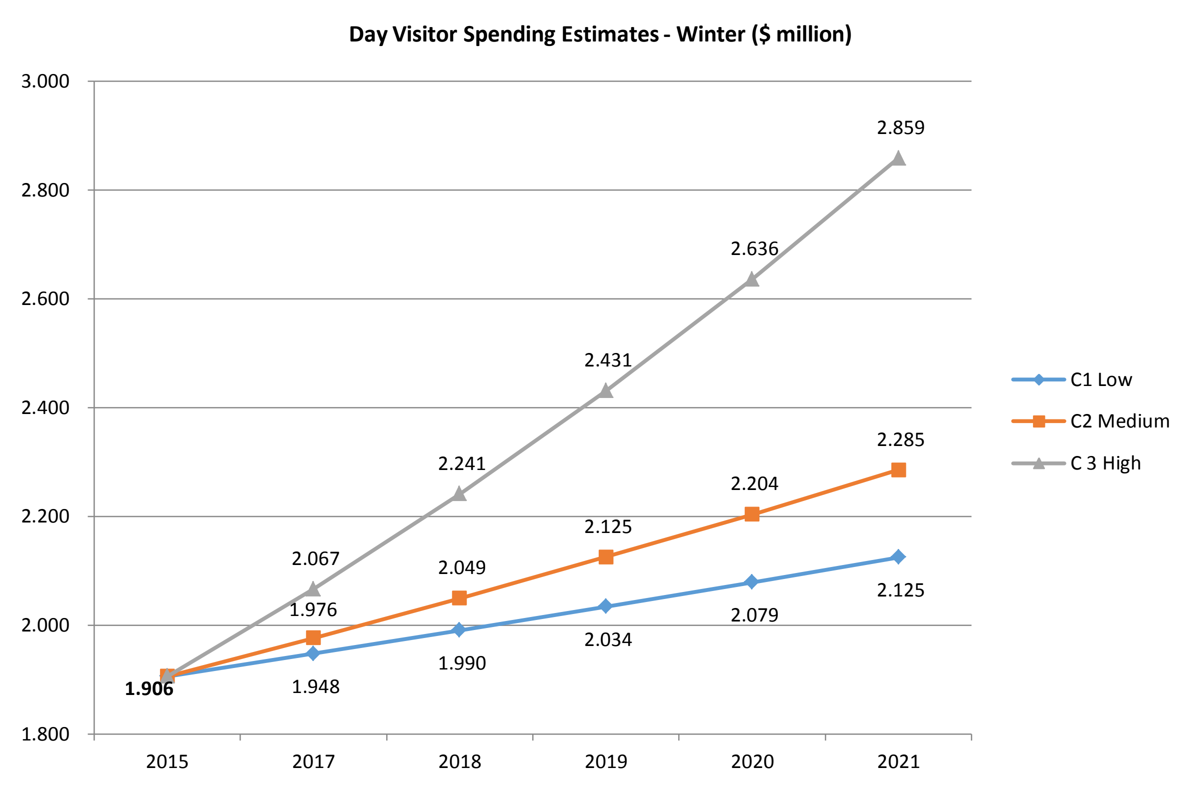
The following chart shows the estimated winter visitor spending over the period to 2021. Based on the various growth scenarios, regional spending would increase from $m 3.62 in 2015 to $m5.42 (C3 High), $m 4.35 (C2 Medium) and $m 4.03 (C1 Low).

Figure 8: Total Visitor Spending Estimates - Winter



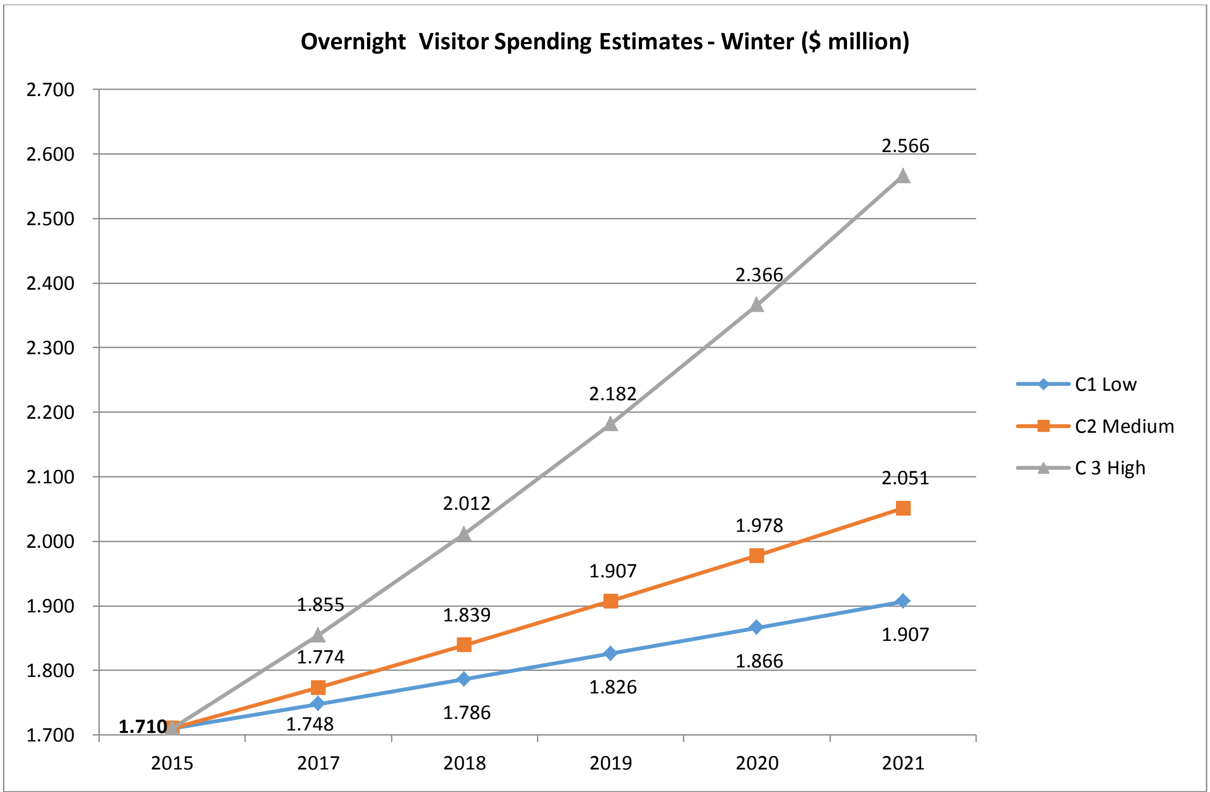
The following charts show the estimates for day visitors and overnight visitors for the Winter period.

Figure 9: Day Visitor Spending Estimates - Winter



Source: MCa Analysis September 2015

Figure 10: Overnight Visitor Spending Estimates - Winter

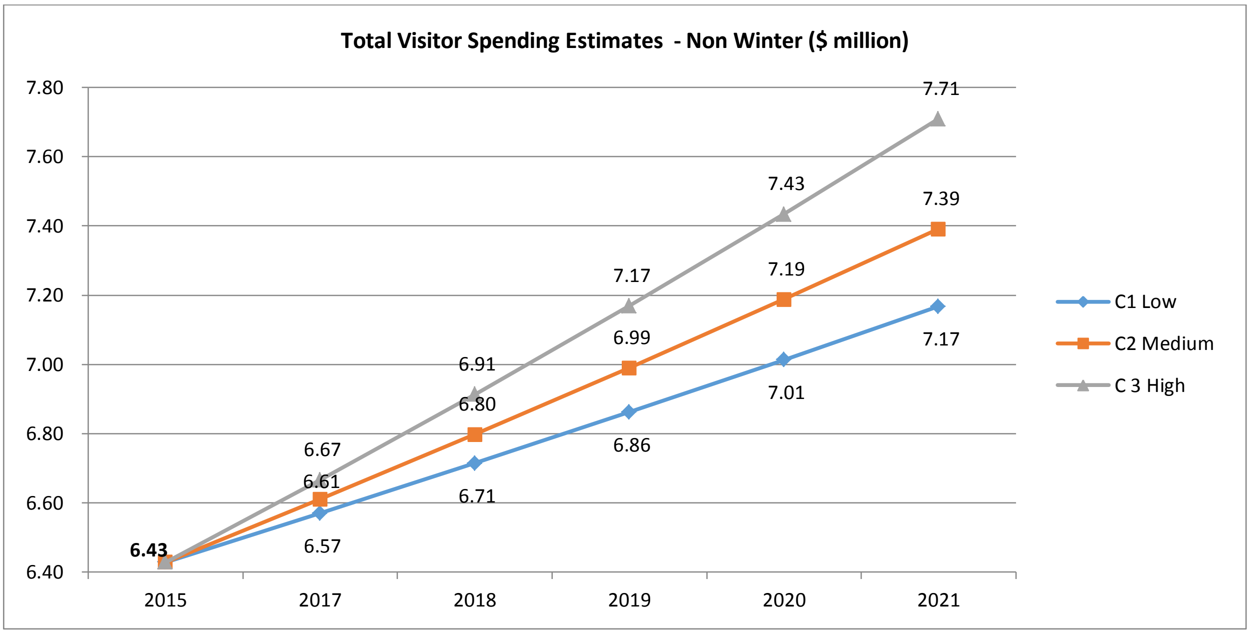


Source: MCa Analysis September 2015

Non-Winter Period

The following chart shows the estimated non-winter visitor spending over the period to 2021. Based on the various growth scenarios, regional spending would increase from $m 6.43 in 2015 to $m 7.71 (C3 High), $m 7.39 (C2 Medium) and $m 7.17 (C1 Low).

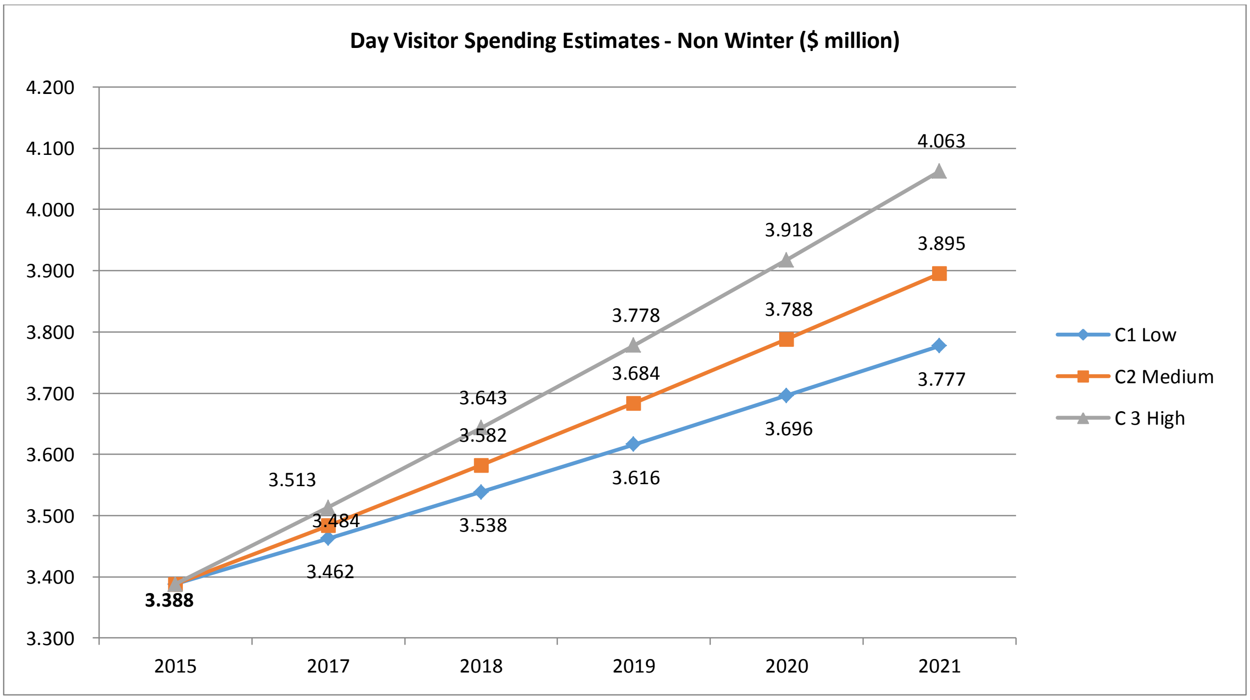
Figure 11: Total Visitor Spending Estimates – Non Winter



Source: MCa Analysis September 2015

The following charts show the estimates for spending by day visitors and overnight visitors for the Non-Winter period. Day visitor spending is projected to increase from $m3.388 in 2015 to $4.063 (C3 High Growth scenario).

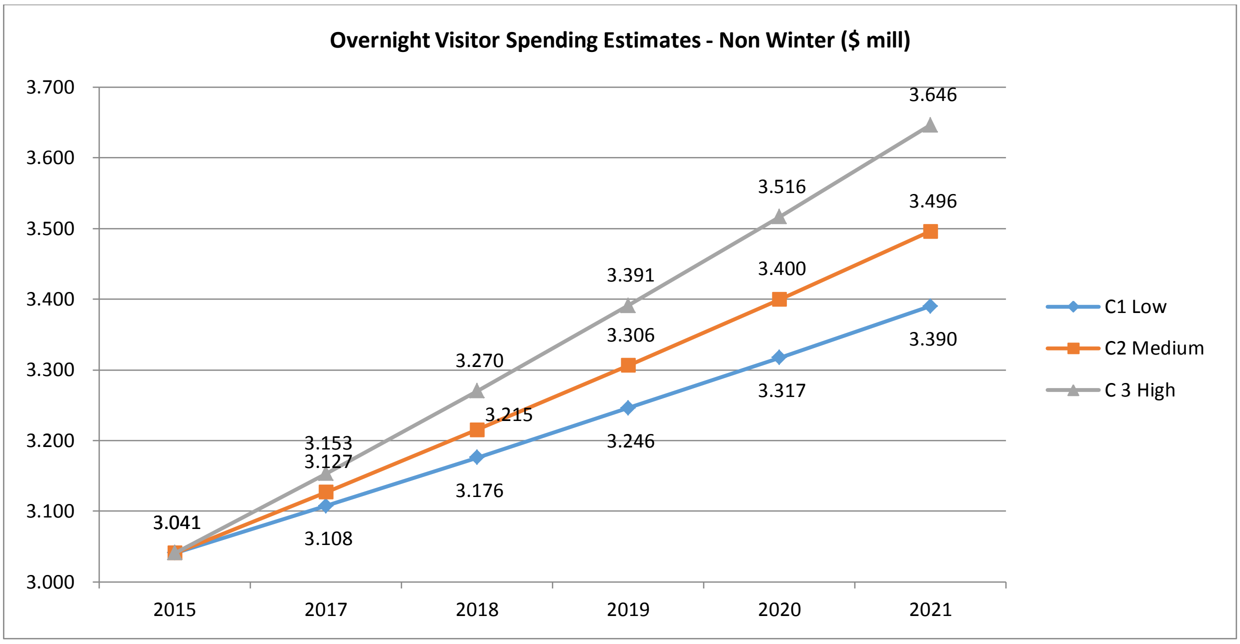
Figure 12: Day Visitor Spending Estimates – Non Winter



Source: MCa Analysis September 2015

Overnight visitor spending is projected to increase from $m 3.041 in 2015 to $m 3.646 (C3 High Growth scenario); $m 3.496 (C2 Medium); $m 3.390 (C1 Low).

Figure 13: Overnight Visitor Spending Estimates – Non Winter



6.4 ECONOMIC IMPACTS

The spending estimates were run through our tourism model to estimate the economic impacts, comprising jobs impacts and regional income impacts.

Construction Phase

The capital investment proposals analysed are those outlined in Section 6.3. Two levels of investment were examined:

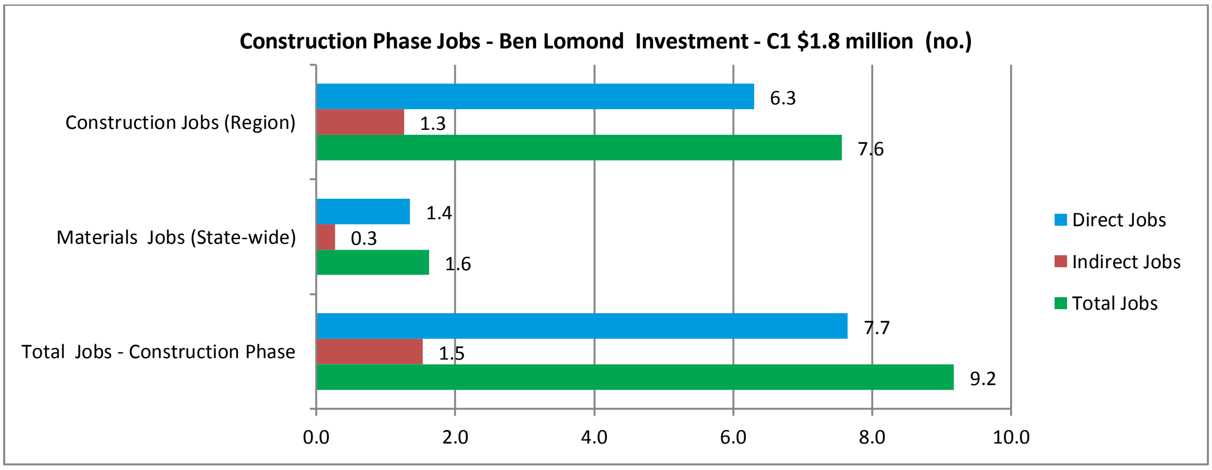
» C1 - All proposed investment: $1.8 million covering up all upgrades, including electricity/gas reticulation ($500,000)

» C2 – Proposed investment (excluding electricity/gas reticulation) : $1.3 million.

C1 - All proposed investment

The $1.8 million investment would generate an estimated total of 7.7 direct jobs during the construction period. These comprise 6.3 direct construction jobs in the region and 1.4 direct jobs in the materials supply. When indirect jobs (multiplier impacts) are included, there are a total of 9.2 jobs during the construction phase.

Figure 14: Construction Phase Employment - $1.8 Million

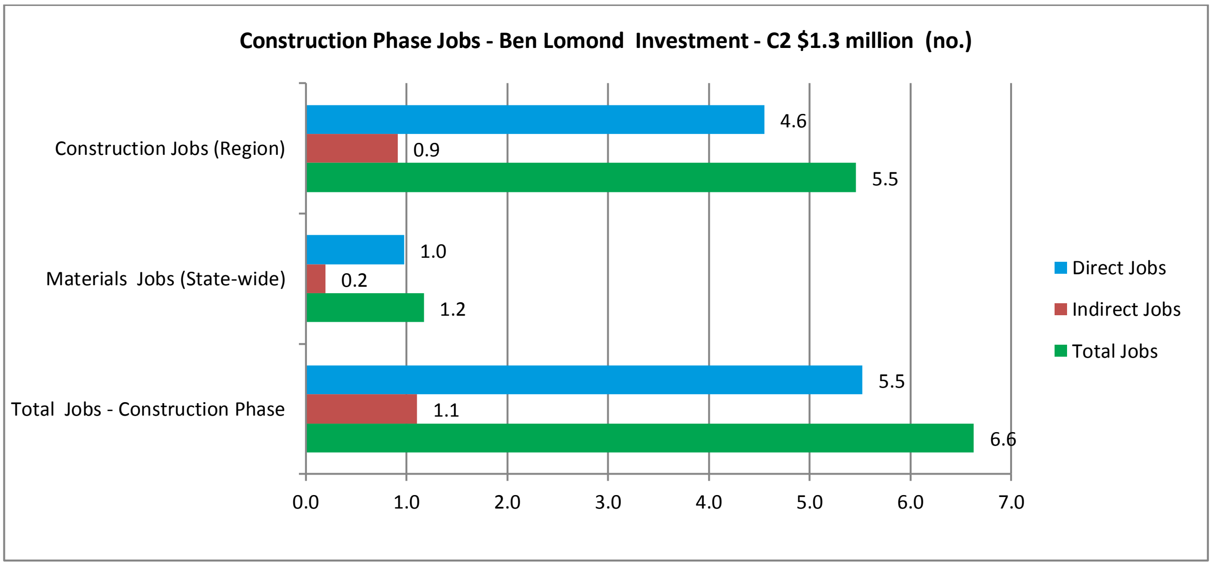


Source: MCa Analysis September 2015

C2 – Proposed investment (excluding electricity/gas reticulation)

The $1.3 million investment would generate an estimated total of 5.5 direct jobs during the construction period. These comprise 4.6 direct construction jobs in the region and 1.0 direct job in the materials supply. When indirect jobs (multiplier impacts) are included, there are a total of 9.2 jobs during the construction phase.

Figure 15: Construction Phase Employment - $1.3 Million



Source: MCa Analysis September 2015

Operations Phase

Detailed modelling was undertaken of alternate scenarios in relation to potential increases in visitor numbers to Ben Lomond. This covered: day visitors and overnight visitors; and the winter season and non-winter periods.

6.5 EMPLOYMENT IMPACTS

The charts below shows that a total of 22.3 local jobs were generated by visitor spending in the winter season in 2015 and 36.6 jobs were generated by visitor spending in non-winter periods.

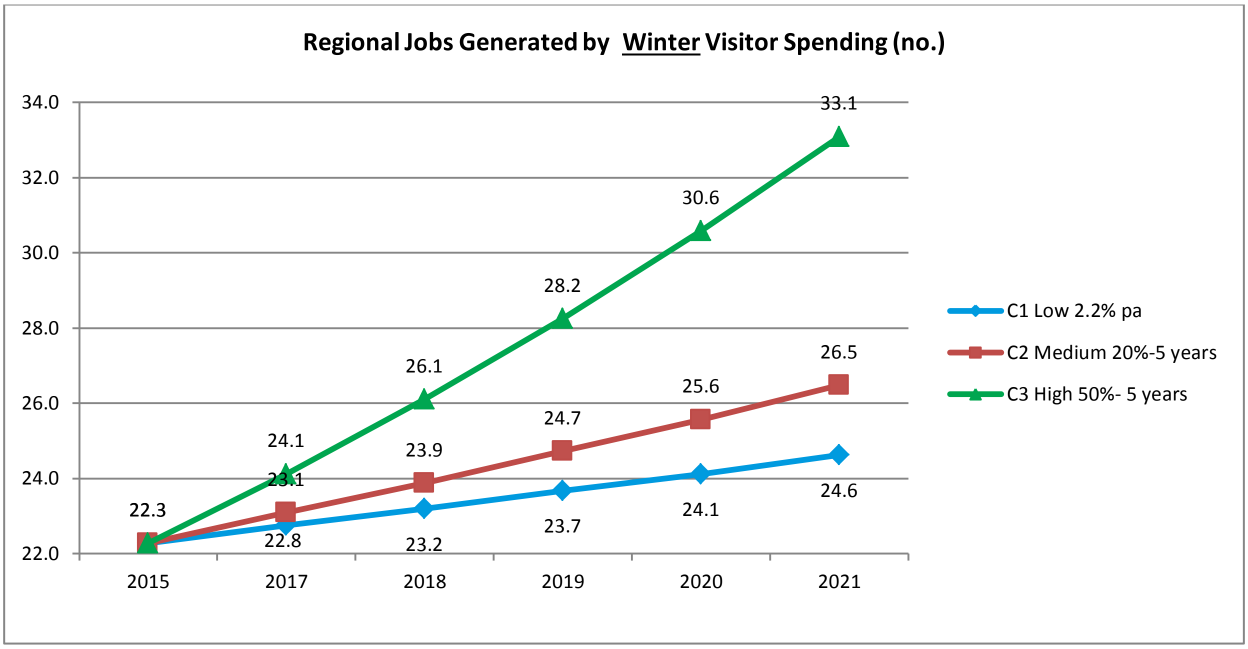
The charts also show growth patterns for jobs under each of the scenarios:

» **Winter:** with the growth in visitor numbers, jobs generated by spending would be 33.1 (C3 High); 26.5 (C2 Medium); and 24.6 (C1 Low)

» **Non-Winter**: with the growth in visitor numbers, jobs generated by spending would be 44.7 (C3 High); 42.0 (C2 Medium); and 40.6 (C1 Low).

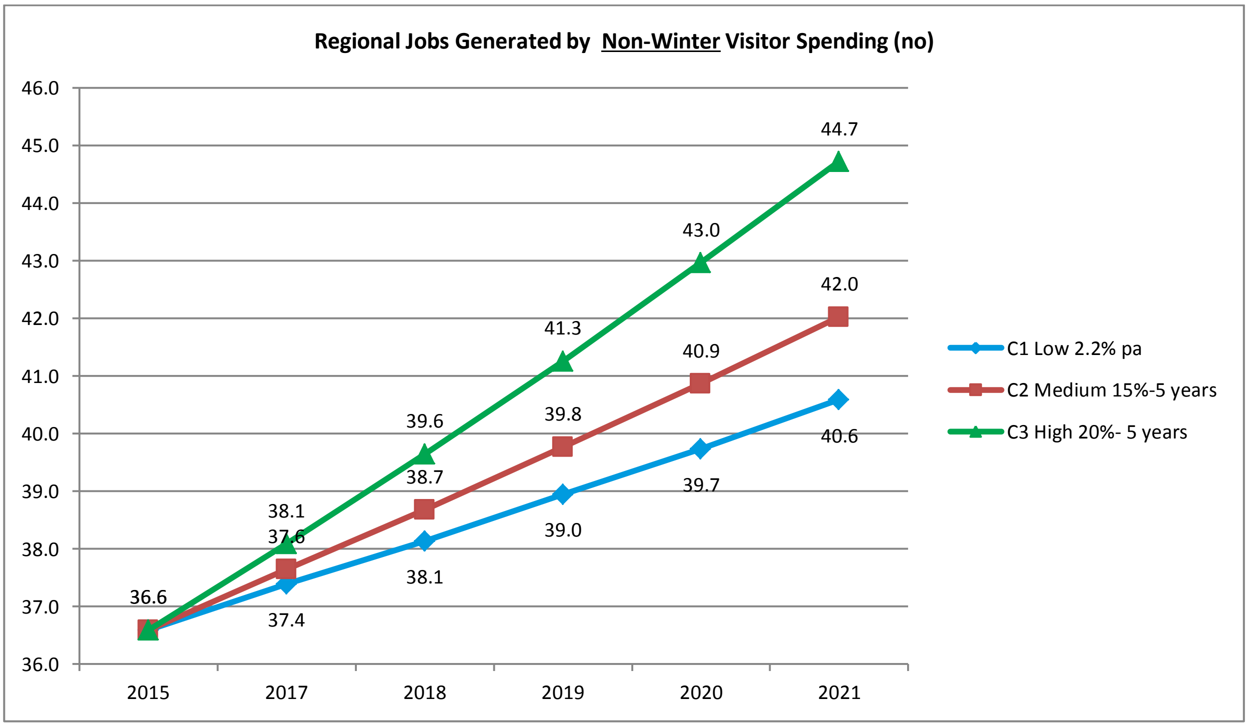
In the event that the capital improvements are not made, visitor numbers would be likely to fall over the period to 2021 and jobs would decline.

Figure 16: Regional Employment - Winter Spending



Source: MCa Analysis September 2015. <Growth rates in scenarios refers to growth rates in visitor numbers>
<Jobs are total jobs and include direct jobs in visitor related activities and indirect jobs generated by the multiplier impacts of these direct jobs>

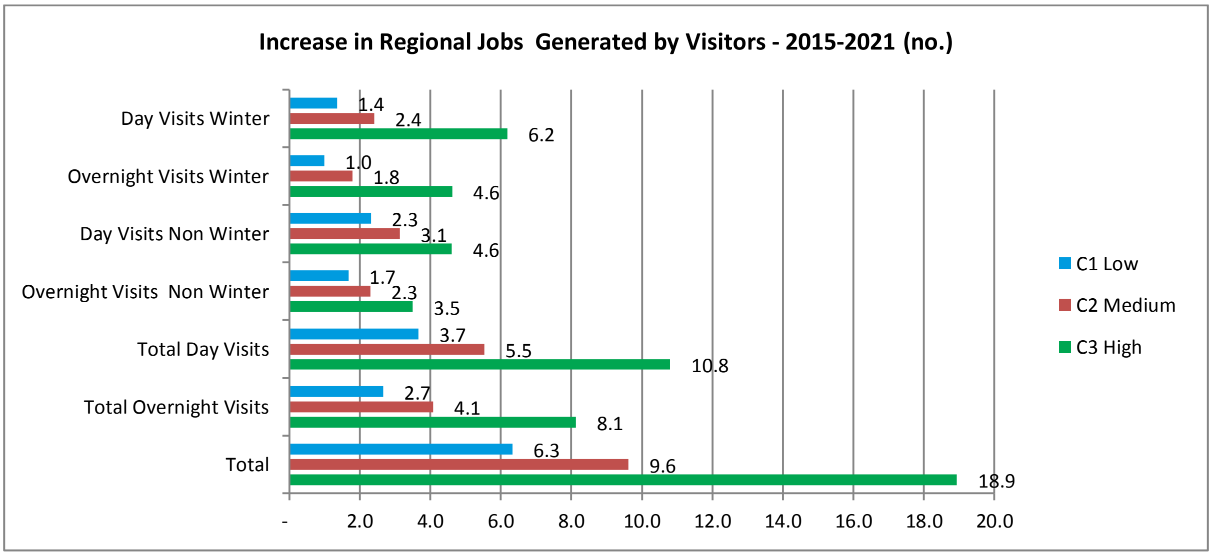
Figure 17: Regional Employment –Non winter Spending



Source: MCa Analysis September 2015 <Growth rates in scenarios refer to growth rates in visitor numbers>
<Jobs are total jobs and include direct jobs in visitor related activities and indirect jobs generated by the multiplier impacts of these direct jobs>

The following table shows the projected increase in jobs under each growth scenario and for each period (winter and non-winter) and for each type of visitor (day visitors and overnight visitors).

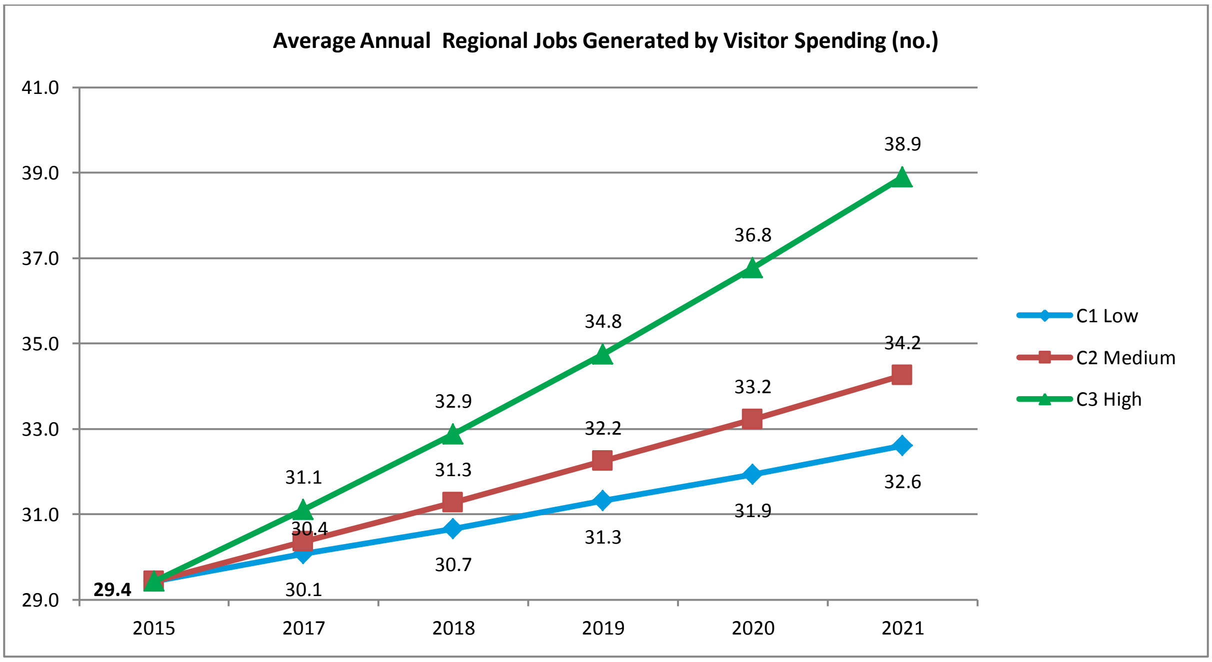
Figure 18: Increase in Regional Employment 2015 - 2021



Source: MCa Analysis September 2015 <Jobs are total jobs and include direct jobs in visitor related activities and indirect jobs generated by the multiplier impacts of these direct jobs.>

To measure the year round impacts these seasonal jobs were averaged to provide annual measure of jobs generated by visitors to Ben Lomond. The chart below shows the growth in jobs associated with each scenario. In 2015 an estimated 29.4 ongoing jobs were associated with the current level of visitors and this increases in 2021 to 38.9 (C3 High), 34.2 (C2 Medium) and 32.6 (C2 Low).

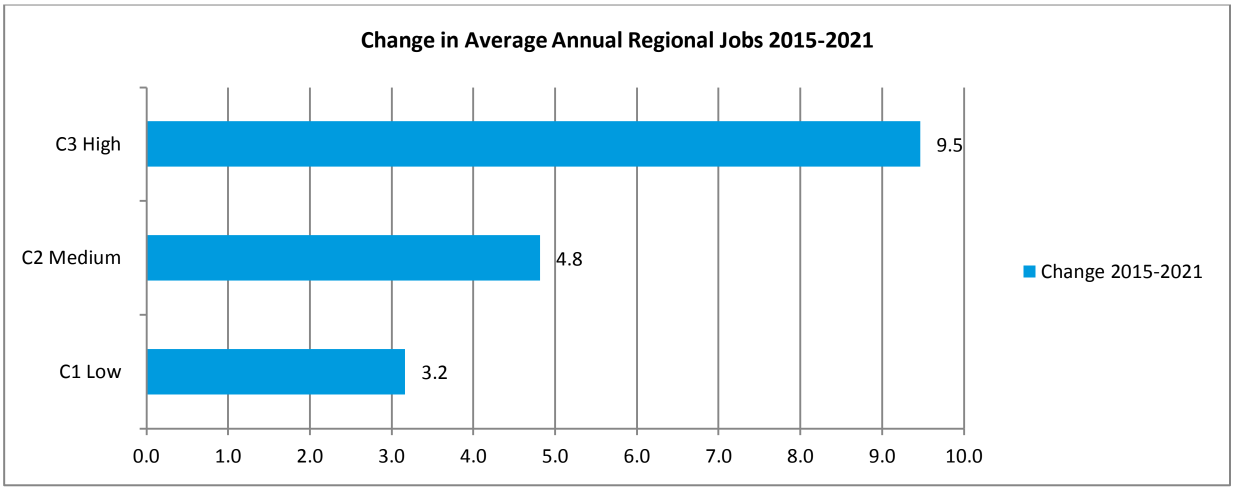
Figure 19: Annual Regional Employment



Source: MCa Analysis September 2015. <Jobs are total jobs and include direct jobs in visitor related activities and indirect jobs generated by the multiplier impacts of these direct jobs>

The chart below shows the change in jobs from the 2015 base to 2021 under each of the scenarios. On an annualised basis the increase in ongoing jobs varies from 3.2 to 9.5 jobs. As noted earlier, in the event that the improvements are not made, visitor numbers would be likely to fall over the period to 2021 and this would lead to a fall in regional jobs.

Figure 20: Change in Average Regional Employment - 2015 - 2021



Source: MCa Analysis September 2015 <Jobs are total jobs and include direct jobs in visitor related activities and indirect jobs generated by the multiplier impacts of these direct jobs>

Regional Income

The following charts show the regional income associated with visitors to Ben Lomond.

Total regional income associated with visitors would increase from: $3.630 million in 2015 to income in 2021 of: $m 4.825 (C3 High), $m 4.250 (C2 Medium) and $m 4.046 (C1 Low).

Figure 21: Regional Income – All visits

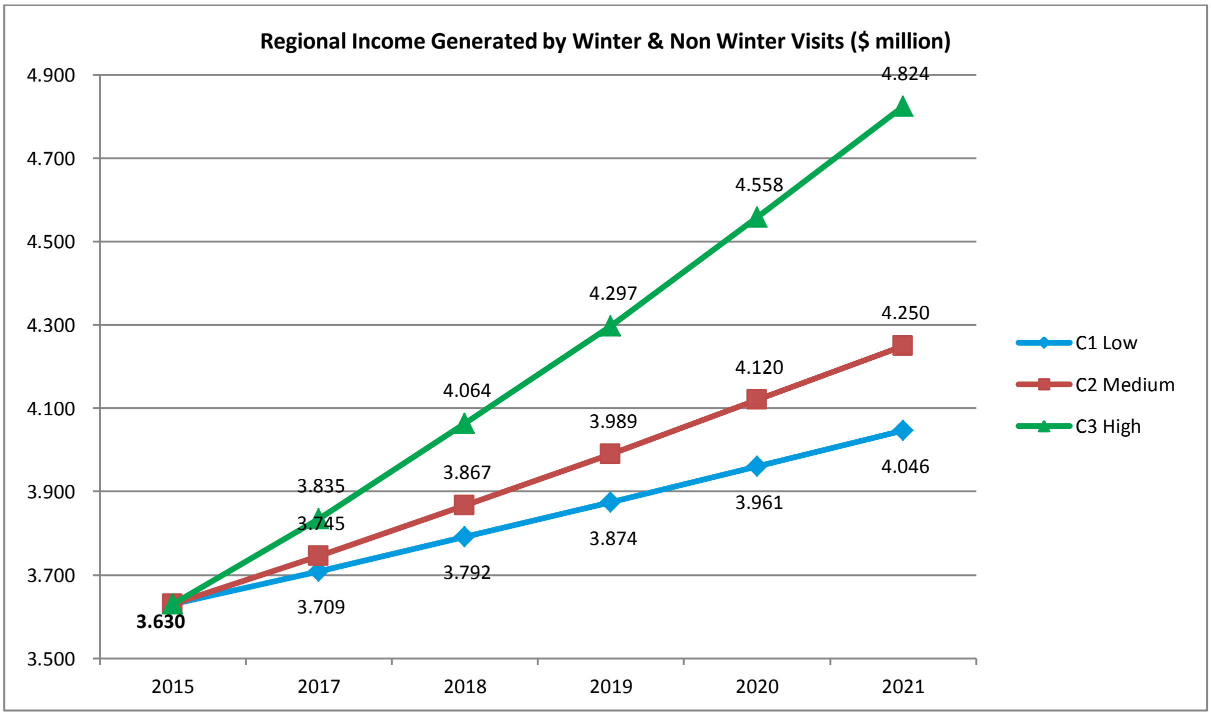


Figure 22: Regional Income – Winter Visits

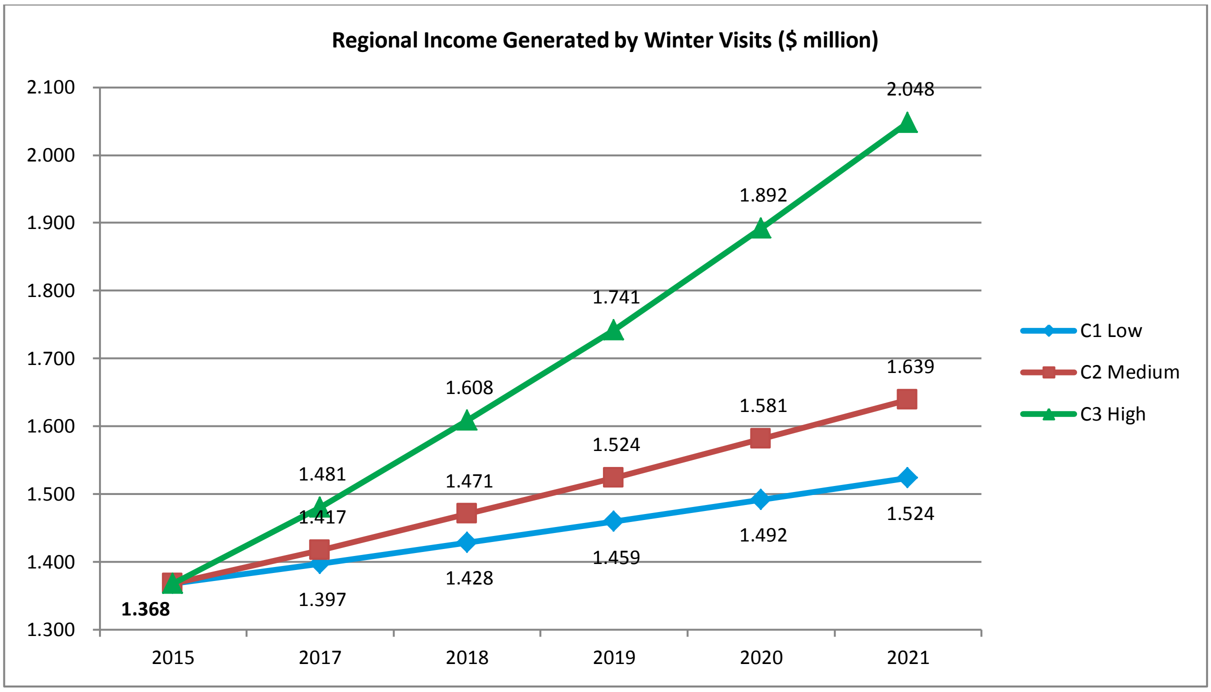


Figure 23: Regional Income – Non Winter Visits

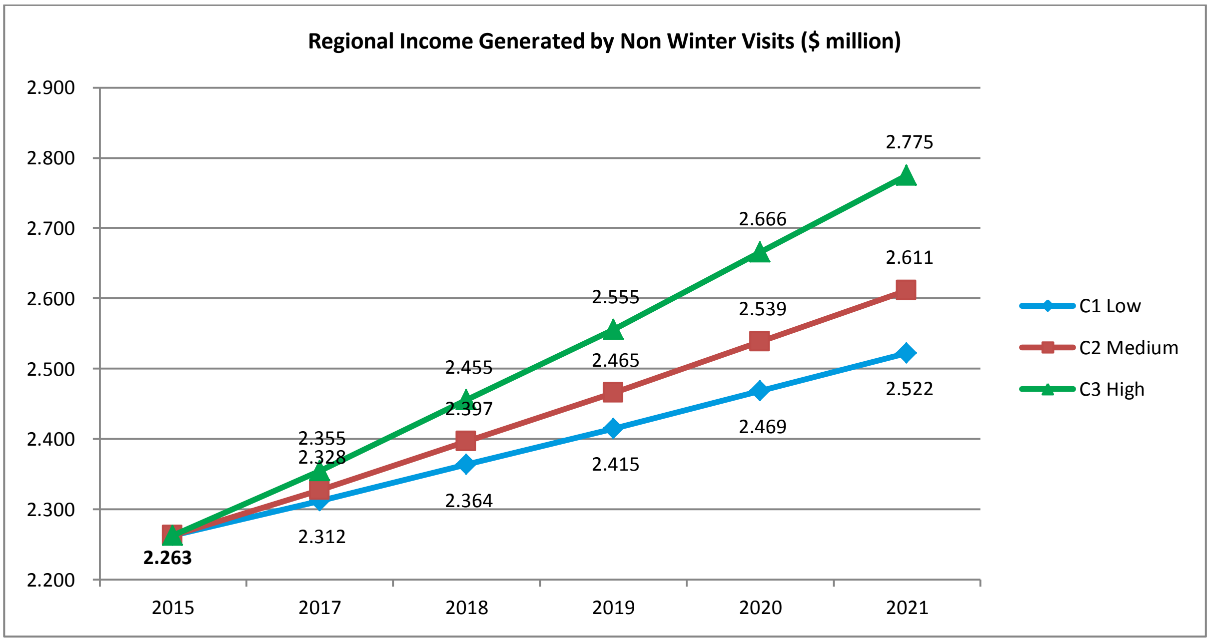
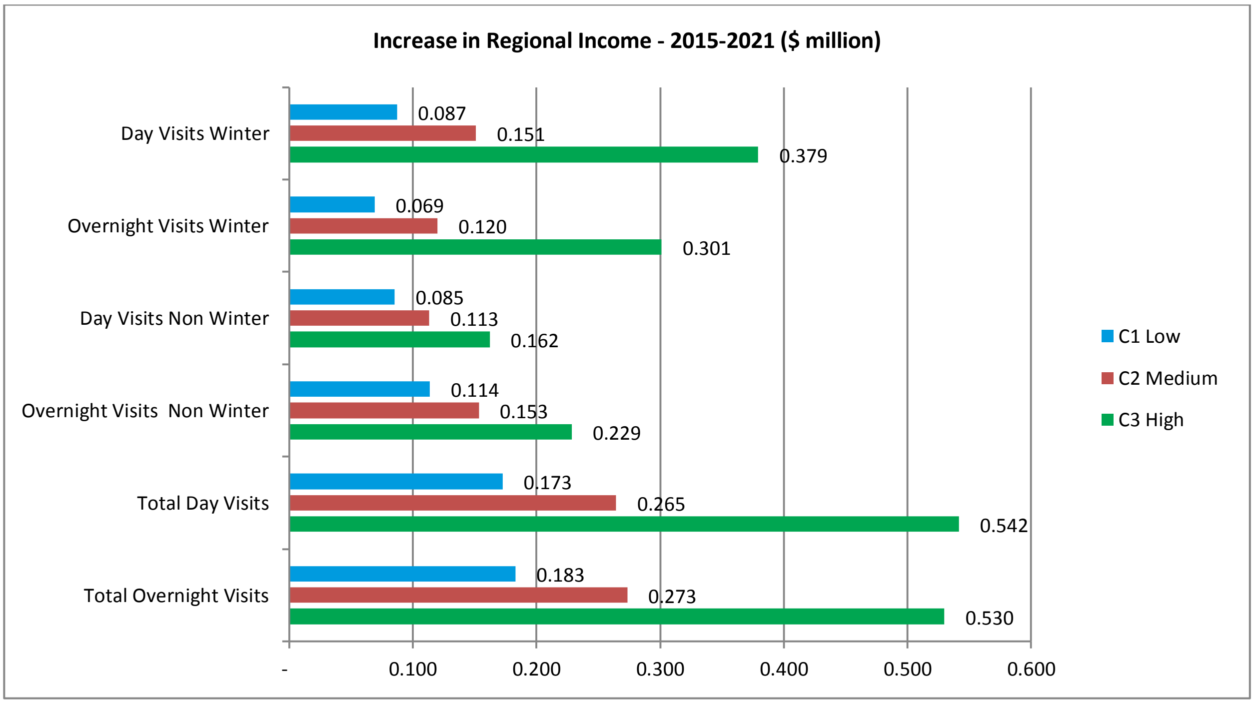


Figure 24: Increase in Regional Income – 2015 - 2021



7 Conclusion

In order for Ben Lomond ski area to successfully compete in today's competitive marketplace as a snow destination it will need to guarantee snow. The skifield continues to experience seasonal challenges that have been overcome through snowmaking in other small ski areas in Australia, New Zealand and elsewhere.

Investment must be realistic and pragmatic and focussed on positioning the Ben Lomond Skifield as an exciting value for money snow experience for 6-8 weeks of the year for the families and young people.

Investment should focus on infrastructure that supports a new revitalised snow play experience that:

» targets the intrastate visitor market - families and young people

» increases the number of visitors who return to the ski area annually

» increases the length of stay in the region by offering a new range of activities in the ski area

» increases visitor spending opportunities to support local businesses

» raises the profile of Ben Lomond National Park.

Investment in the order of $1.3 million -$1.8 million is required to achieve this outcome. This will provide a major tourism and recreational product of state significance, capable of generating new and complimentary tourism investment in Northern Tasmania and contributing to the economic growth of the wider region.

The short to medium term benefits that are likely to arise from the investment are:

» creation of short term jobs through design and construction

» creation of demand for secondary services throughout region as construction progresses

» employment growth directly related to the ski area revitalisation

» employment growth indirectly related to the investment in regional accommodation and tourism services

» increased complementary benefits for Tasmanians such as active recreation, health, and social experiences

» diversification of the region's tourism product mix

» longer term benefits are likely to be increased employment and economic development opportunities for the regional and state economy.

Appendix 1. Tourism Market analysis

Tourism in Tasmania is dominated by intrastate visitors (Tasmanian residents) who comprised 84% of total annual visitation in the year ending March 2015 (see Table 1). Of these the vast majority (66% of total visitation) are day trippers. Interstate visitors comprise 13% of total visitors and there is small international visitors component (2.5%). Interstate, international and overnight intrastate visitation show recent increases while intrastate day trips have been decreasing.

Table 10: Annual Visitation to Tasmania, year ending March 201531

Visitors	Nos.	% change[32]	Nights	% change	Expenditure	% change
Intrastate Day	4,648,000	-2%	-	-	$517 million	+4%
Intrastate Overnight	1,270,000	+12%	3,055,000	+10%	$368 million	-2%
Interstate	946,100	+3%	7,310,000	+3%	$1,578,000	+13%
International	177,100	+11%	3,179,000	+9%	$265 million	+9%

Tourism to the region

Analysis of visitation to Northern Tasmania indicates that it is dominated by intrastate visitors (Tasmanian residents) who comprised 81% of total annual visitation in the year ending March 2015 The vast majority (67% of total visitation) are day trippers. Interstate visitors comprise 16% (368,000) of total visitors and there is small international visitor component (3.4%). The estimated 702,000 annual **domestic overnight visitors** comprised 30% of total visitation to northern Tasmania in 2014/15.

Analysis of performance over the three year period since 2012 shows that interstate, international and overnight intrastate visits and nights have all grown strongly, with day visitors also showing 1.6% per annum growth. Growth in interstate visitor nights has been strong over the period however there have been falls in international and intrastate visitor nights (despite the growth in overall visitors), indicating shortening average lengths of stay (ALOS) Tasmanian Visitor Survey data indicates a fall in average length of stay from 2.98 to 2.91 in 2015, however ALOs for holiday visits rose from 2.34 to 2.53. NVS data indicates spend per day/night, ranging from $86 per day for international visitors to $190 for domestic overnight visitors.

Between 2012 and 2015, Northern Tasmania's market share of the State's visitation has remained broadly constant at 32.5% (0.5% growth). The day and international visitor segments saw small rises during this period with domestic overnight visitors (interstate and intrastate) both losing a small amount of market share.

Table 11: Annual Visitation to Northern Tasmania, year ending March 2015[33]

Visitors	Numbers	% change between March 2012 and March 2015	Nights	% change between March 2012 and March 2015
Intrastate Day	1,589,895	+6.4%	-	-
Intrastate Overnight	333,965	+11%	616,381	-10.2%
Interstate Overnight	367,890	+23%	4,884,455	+25%
International	79,691	+50%	797,740	-2.7%

[31] Sourced from Tourism Tasmania (2015), *Tasmanian Tourism Snapshot: Year ending March 2015*. Visitor estimates are based on the Tasmanian Visitor Survey, the International Visitor Survey (IVS) and the National Visitor Survey (NVS). Data for intrastate and international visitors is for the year ending December 2014 due to delays in reports from the NVS and IVS.

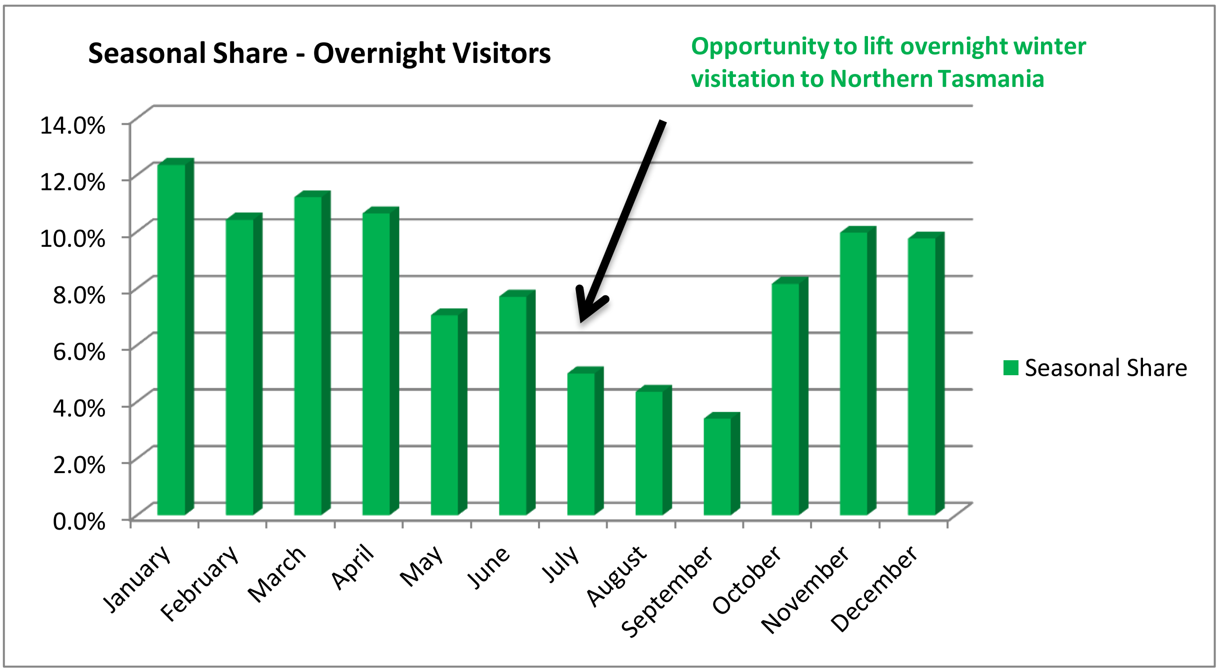
[32] Percentage change from the previous year.

[33] Sourced from Tasmanian Visitor Survey (interstate overnight), the International Visitor Survey (IVS) and the National Visitor Survey (NVS) (day visits, intrastate overnights). All data is for the year ending March 2015.

SEASONALITY

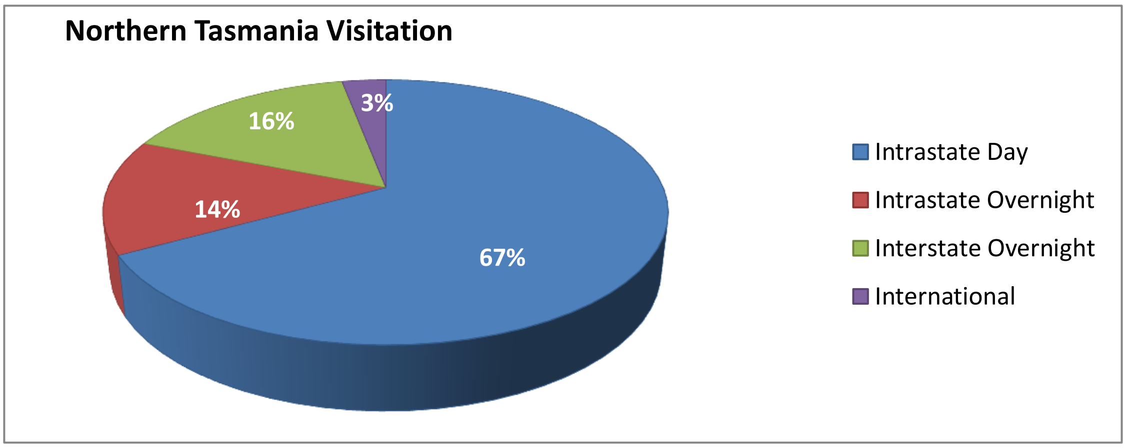
As would be anticipated, Northern Tasmania exhibits strong levels of seasonality in trading patterns. For overnight visitors[34] 64% of visitation is between November and April, while for day visitors, November and December is the peak period (25% of visitors). June and September are the quietest for months for day and overnight markets presenting an opportunity to Ben Lomond ski field area to grow visitation during this time.

Figure 25: Northern Tasmania Seasonality



[34] Source: IVS, NVS

Figure 26: Annual Visitation to Northern Tasmania, year ending March 2015



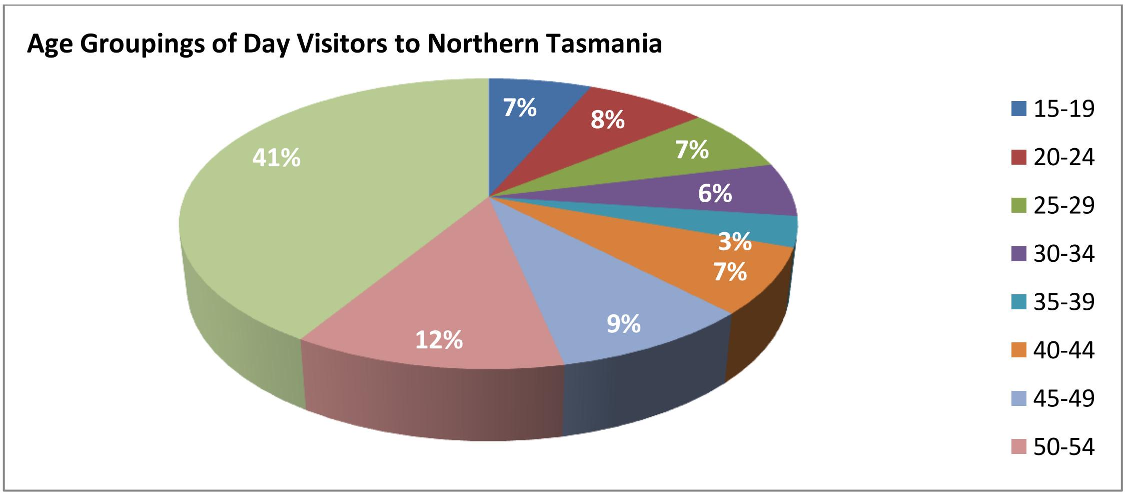
PURPOSE OF VISIT

Analysis of TVS shows that Northern Tasmania's interstate visitor market is dominated by holiday visitors - 63% of all visitors, followed by VFR (21%), Business (12%) and Other (5%).

SOCIO-DEMOGRAPHIC MAKE-UP OF VISITORS

Older age groupings dominate North Tasmania's day visitor market - 53% of the market is made up of visitors from the 50+ age groupings. International visitors also are dominated by older age groupings - 43% of visitors are in the 50+ age bracket. The 25-29 age grouping also attracts a notable proportion of visits (16%).

Figure 27: Age Groups of Day Visitors to Northern Tasmania35



The age grouping profile of interstate visitors differs a little from day and international visitors, with a more even spread of visitors across most age groups, however 44% of visitors still originate from the 55+ age groupings. Visitors under 25 represent a small proportion of the market at present (5%).

Other socio-demographic characteristics of interstate visitors to Northern Tasmania include:

» 75% of interstate visitors have a partner and 25% are single/not part of a couple. Overnight domestic visitors tend to travel as families with children or older couple visitors

» Couples with no children form the largest single group (43%), followed by families with older children (23%) and singles (16%)

» Household income of visitors varies, however the largest single group of visitors (13%) have incomes in the highest bracket -$200,000+. 44% of visitors have household incomes above $104,000.

[35] Source: NVS, year ending March 2015

Accommodation

As would be anticipated, hotels/motels are the primary type of accommodation used (37%), followed by using the homes of friends and relatives (19%). Caravan parks are utilised by 11% of visitors. There are different patterns in accommodation used by domestic overnight visitors in Launceston and other parts of the region, reflecting the greater range of hotel/resort/motel accommodation in Launceston and greater opportunities for camping etc elsewhere in the region.

ACTIVITIES

Figures 19 to 21 show breakdowns of day, intrastate and interstate visitor participation in activities during trips to Northern Tasmania and the relative growth/ decline in these activities since 2012. Outdoor/ nature-based activities are recognised as a key group of activity options for visitors to the region.

Day Visitors

For the day visitor market[36], as is the norm in most destinations, social activities (eating out etc) are the most popular activity (67%). Outdoor/nature-based and active/outdoor sports are participated in by approximately 25% of visitors. Both of these sectors have seen strong growth since 2012 - outdoor/ nature-based participation growing by 29% and active outdoor/sports activities growing by 54%.

Intrastate Overnight Visitors

For the intrastate overnight visitor market, analysis of the NVS shows that once again, social activities (54%) are the dominant group of activities enjoyed by visitors during trips, followed by outdoor/ nature-based (19%) and active/outdoor sports (15%). Data analysis shows a 13% growth in outdoor/ nature-based activities since 2012, with local attractions/ tourist activities also seeing strong growth during this period (31%). Intrastate participation in active outdoor/ sports (-6%) and arts & heritage (-32%) saw falls in visitor participation during the same time period.

Interstate Overnight Visitors

Analysis of activities participated in by interstate visitors show a number of clear trends:

- 78% of visitors take part in outdoor and other activities - the most popular group of activities
- 52% of visitors visit national parks
- 64% of visitors take part in bushwalking and other walks
- The shorter the bushwalk distance, the greater the participation levels – bushwalks of less than 2 hours are enjoyed by 41% of visitors, compared to 23% for 2 to 4 hour walks, 10% for bushwalks of over 4 hours (not overnight) and 4% of overnight walks (or longer). Growth of 44% was seen in bushwalking of less than 2 hours between 2012 and 2015
- Visiting historic sites/attractions attract participation from 50% of visitors - a grouping of activities that's seen 32% growth since 2012
- The museums/galleries/craft shops/antique shops sectors are also popular with visitors - approximately 30% of visitors participate in these types of activities - all have also show strong growth in participation numbers since 2012
- Participation in food and drink related activities have shown particularly strong growth since 2012 – Browsing at Markets (+33%), Visiting Wineries (+41%), Visiting Breweries/Distilleries (+59%) and Visiting Local Food Producers (+23%). Browsing markets is the most popular food and drink-related activity at present – taken part in by 41% of visitors
- A wide range of niche sports and active outdoors activities are participated in by visitors - analysis of TVS data suggests participation levels in some of these activities has fallen during the period since 2012, including; golf (-12%), fishing (-33%) and canoeing/kayaking (-27%).

[36] NVS, year ending March 2015

Table 12: Day Visitor Participation in Activities

Activities	Number of Day Visitors who Participated in an Activity During Trip	% of Visitor Participation During Trip	Growth/ Decline Since 2012
Outdoor/nature	232,285	13.0%	29.0%
Active outdoor/sports	172,368	9.5%	54.0%
Arts/heritage	101,180	6.0%	40.0%
Local attractions/tourist activities	73,635	4.0%	10.0%
Social activities	1,204,977	67.0%	1.3%
Other activities	6,072	0.5%	5.0%

Table 13: Intrastate Overnight Visitor Participation in Activities

	Number of Intrastate Overnight Visitors who Participated in an Activity During Trip	% of Visitor Participation During Trip	Growth/ Decline Since 2012
Outdoor/nature	89,542	19%	13.0%
Active outdoor/sports	72,325	15.0%	-6.0%
Arts/heritage	24,788	5.0%	-32.0%
Local attractions/tourist activities	32,451	7.0%	31.0%
Social activities	261,689	54.0%	3.0%
Other activities	2,745	0.5%	182.0%

Table 14: Interstate Overnight Visitor Participation in Activities

Activities	Number of Interstate Visitors who Participated in an Activity During Trip	% of Visitor Participation During Trip	Growth/ Decline since 2012
Visit historic houses	182,237	31%	35%
Visit historic sites/attractions	294,889	50%	32%
Visit antique shops	169,885	29%	23%
Visit museums	204,067	34%	44%
Visit galleries	171,761	29%	22%
Visit craft shops	226,033	38%	23%
Buy Tasmanian made art/craft	182,473	31%	15%
Attend the theatre/performing arts	35,232	6%	35%
Browse at the markets	246,504	41%	33%
Visit wineries	133,003	22%	41%
TOTAL Visit breweries/distilleries	101,017	17%	59%
Visit local food producer	197,721	33%	23%
Experience Tasmanian Aboriginal Culture	22,414	4%	36%
Bushwalk for less than two hours	201,750	34%	44%
Bushwalk for 2 to 4 hours	136,121	23%	44%
Bushwalk for over 4 hours (not overnight)	60,395	10%	10%
Bushwalk overnight or longer	21,107	4%	28%
TOTAL Bushwalking	333,235	56%	31%
Other walks (not a bushwalk)	108,666	18%	19%
TOTAL Bushwalking + other walks	378,300	64%	28%
Visit National Parks	311,304	52%	35%
Quad bike/4WD off-road	8,865	1%	-80%
Sail/yacht	8,603	1%	38%
Canoe/kayak/sea kayak	11,542	2%	-27%
Fish for trout	16,404	3%	-10%
Fish - other	17,952	3%	-33%
Scuba dive	2,561	0.5%	-27%
Cycle	11,446	2%	14% (since 2014)
Mountain bike	6,289	1%	83% (since 2014)
TOTAL cycle or mountain bike	15,259	4%	1%
Fly in a light aircraft/helicopter (scenic flight)	7,191	1%	6%
View wildlife in wildlife park/zoo	111,874	19%	30%
View wildlife not in wildlife park/zoo (from July 2005)	151,611	25%	25%
Play golf	22,694	4%	-12%
Visit gardens	148,802	25%	33%
Cruises - river or coastal (from July 2001)	159,278	27%	35%
Take a train journey (from July 2001)	28,587	5%	-15%
Travel as a backpacker	37,910	6%	18%
TOTAL Outdoor and other activities	461,766	78%	27%

Appendix 2. Estimated Visitation Ben Lomond National Park

Key points

- There are approximately 49,900 visitors per annum to Ben Lomond
- About three quarters of the visitors are Tasmanians
- The majority of Tasmanians have heard of the Ben Lomond National Park, but actual visitation is much lower
- Awareness and visitation is highest from the nearby areas – Launceston and the North East.

Part A Data notes

The information in this report comes from two sources:

Study	Collected by	Scope and coverage
2014 Community Monitor	Instinct and reason, on behalf of the Parks and Wildlife Service and Tourism Tasmania	Includes – Tasmanian residents aged 15 and over.
Tasmanian Visitor Survey	Tourism Tasmania	Includes – visitors to Tasmania from interstate or overseas, aged 15 and over

The data collected by two different methodologies. Although many of the collection concepts are similar, the data is not strictly comparable. Therefore, the estimate of total visitors to Ben Lomond should be treated as an approximation only.

Part B Disclaimer

This information was created by the Parks and Wildlife Service for its own purposes.

This information was created via surveys or other estimating procedures. While care has been taken to ensure the information is correct and accurate as possible, these results should be used for general information and should not be treated as perfect or exact.

Therefore, the Parks and Wildlife Service does not guarantee, and accepts no legal liability whatsoever arising from, or connected to, the use of any material contained in this report.

The Parks and Wildlife Service recommends that users exercise their own skill and care with respect to their use of this website and that users carefully evaluate the accuracy, currency, completeness and relevance of this material for their purposes.

This information is not a substitute for independent professional advice and users should obtain any appropriate professional advice relevant to their particular circumstances.

Part C Summary

Source of study data	Visitors	Proportion	Time period	Notes
2014 Community Monitor	37,600 visitors	75%	Had visited at least once in the previous 12 months (up to early 2014)	1, 2
Tasmanian Visitor Survey	12,300 visitors	25%	Visited Tasmania in the 12 months ending March 2015	3, 4
Total visitors to Ben Lomond	**49,900 visitors**	**100%**	**Per annum – roughly in a 12 month period ending late 2014 through early 2015**	**5**

1. Data from the *2014 Community Monitor* is an estimate of Tasmanian residents who have been to Ben Lomond at least once in the previous 12 month period – but it does not count multiple visits by the same person
2. The estimate of 37,600 visitors from the *Community Monitor* has been calculated as follows:
    a. The **Estimated Resident Population** of Tasmania in the 12 months ending June 2013 = 513,00 (Source: Australian Bureau of Statistics, *Australian Demographic Statistics*)
    b. The Estimated Resident Population of Tasmania **aged 15 or over** = 418,000
    c. Estimated proportion of Tasmanians who **visited Ben Lomond** at least once in the 12 months to early 2014 = 9% (Source: *Community Monitor*)
    d. Therefore → 418,000 x 0.09 = 37,600
3. The 12,286 visitors from the *Tasmanian Visitor Survey* equates to just over 1% of all visitors to Tasmania (that is 12,286 divided by 1,103,674 = 1.2% of visitors aged 15 or over to Tasmania in the 12 months ending March 2015)
4. The 12,286 visitors from the *Tasmanian Visitor Survey* has been rounded to 12,300
5. Total visitors = Total Tasmanians + visitors to Tasmania who visited Ben Lomond in a 12 month period.

Part D – Community Monitor Results – summary

Background

In 2014, the market research company **instinct and reason** conducted the **2014 Community Monitor**.

Instinct and reason conducted this survey on behalf of the Parks and Wildlife Service and Tourism Tasmania.

This survey builds a picture of the Tasmanian community's holiday travel activity in the 12 months leading up to the study as well as its visitation and understanding of National Parks and Reserves – including **Ben Lomond National Park**.

Instinct and reason collected data from a random sample of 1,014 Tasmanian residents (aged 15 or over).

Awareness of Ben Lomond National Park

» 65% of Tasmanian respondents said they were aware (knew about) the Ben Lomond National Park

» Awareness was highest nearby, in the Launceston and North East region:

- 59% of respondents living the Hobart region were aware of Ben Lomond
- 59% of respondents in the South East region were aware
- 76% of respondents in the Launceston and North East region were aware
- 66% of respondents in the West and North West region were aware

» Ben Lomond was one of the most well-known parks or reserves in the northern region – along with Freycinet National Park, the Bay of Fires, Maria Island National Park and Friendly Beaches

» See Appendix A.

Visitation to Ben Lomond National Park by Tasmanian residents

- Although awareness was high, the number of Tasmanians visiting Ben Lomond was much lower
- Only 9% of Tasmanian residents (who had been to a National Park or reserve in the previous 12 months) went to Ben Lomond
- Ben Lomond is not the only park or reserve where awareness is high but visitation was relatively low – for example, 63% of Tasmanians are aware of the Mole Creek caves, but only 11% visited in the previous 12 months
- However, when thinking only about parks and reserves in the east region, Ben Lomond is **regionally important**. Of the Tasmanians who had been to a park or reserve in the East Region in the previous 12 months, Ben Lomond was ranked fourth after Freycinet, Bay of Fires and Friendly Beaches
- Residents who lived nearby were – not surprisingly – more likely to have visited Ben Lomond
  - 12% of residents who lived in the Launceston North East region (who had visited a park or reserve in the previous 12 months) had been to Ben Lomond; compared to only 6% of residents who lived in the South East region of Tasmania
- See Appendix B

Appendix 3.Community Monitor – Awareness of parks and reserves

Awareness of Parks & Reserves in Tasmania

The most well-known Tasmanian parks and reserves are:

1. Mt Wellington (80% of Tasmanians indicated they are aware of it)
2. Cataract Gorge (76%)
3. Port Arthur Historic Site (74%)
4. Cradle Mountain National Park (74%)
5. Freycinet National Park (70%)
6. Bruny Island (69%)
7. Bay of Fires (68%)
8. The Nut - Stanley (67%)
9. **Ben Lomond National Park (65%)**
10. Seven Mile Beach (64%)
11. The Franklin and Gordon Wild Rivers National Park (63%)
12. Mole Creek National Park (63%)
13. The Maria Island National Park (62%)
14. Richmond Jail Historic Site (61%)
15. Mt Nelson (60%)
16. Tahune Air Walk (59%)
17. Great Lake (57%)
18. Hastings Cave and Thermal Pool (57%)
19. Lake St Clair National Park (57%)
20. The Tasman Peninsular (56%)
21. The Tarkine (56%)
22. Lake Barrington rowing course (56%)
23. Liffy Falls (56%)
24. Cascade Female Factory historic site (55%)
25. Mt Field National Park (54%)
26. Friendly Beaches (54%)
27. Walls of Jerusalem National Park (52%)
28. Entally House (51%)
29. Flinders Island Castle Rock (50%).

Awareness of Parks & Reserves in the East Region

Freycinet National Park is the park or reserve most frequently mentioned by Tasmanians in the East region but there were four more extremely well known parks or reserves in this region.

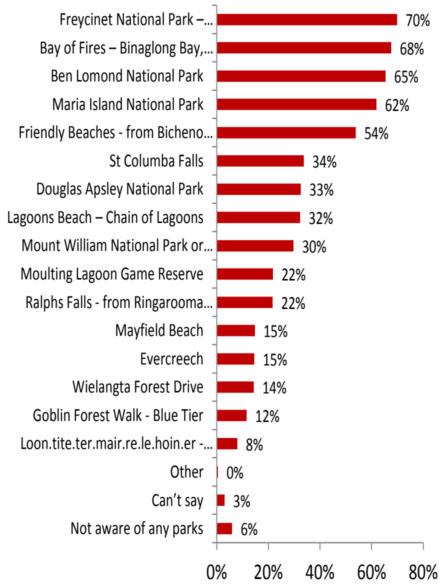
They include the Bay of Fires (68% aware), the **Ben Lomond National Park (65%),** Maria Island National Park (62%) and Friendly Beaches (54%).

These are some of the most recognised parks and reserves in Tasmania.

In addition there were a number of well recognised parks and reserves that include St Columba Falls (34%), Douglas Apsley National park (33%), Lagoons Beach Chain of Lagoons (32%) and the Mount William National Park (30%).

These parks and reserves are best known by people living in the Launceston and the North East of Tasmania.

Parks & Reserves known



Who knows them?

C1g. Awareness of parks & reserves – East Region	Region			
	Hobart	South East	Launceston & North East	West & North West
n=	435	73	283	223
	%	%	%	%
Freycinet National Park – Wineglass Bay	66	68	75	71
Bay of Fires	63	58	76	68
Ben Lomond National Park	59	59	77	66
Maria Island National Park	62	63	63	60
Friendly Beaches	54	60	56	49
St Columba Falls	28	30	47	29
Douglas Apsley National Park	36	33	35	23
Lagoons Beach – Chain of Lagoons	30	31	40	28
Mount William National Park ...	27	26	41	21
Moulting Lagoon Game Reserve	24	29	23	15
Ralphs Falls	20	12	31	16
Mayfield Beach	21	17	12	7
Evercreech	13	15	24	6
Wielangta Forest Drive	21	27	9	5
Goblin Forest Walk - Blue Tier	11	13	16	6
Loon.tite.ter.mair.re.le.hoin.er - Swansea	10	8	7	6
Other	1	0	1	0
Can't say	4	6	3	1
Not aware of any parks	6	10	4	7

QC1g. Which parks and reserves, if any, are you aware of in East Region?
Base: *Total weighted sample (N=1014)*

[ASK ALL]

C1g. Which parks and reserves, if any, are you aware of in the East Region?

Please choose all that apply

Note – the numbers in brackets are the codes for each site –they are not the number or per cent of visitors who are aware of each place

- ❑ Bay of Fires – Binaglong Bay, coast camping sites out of St Helens (81)
- ❑ Ben Lomond National Park (82)
- ❑ Douglas Apsley National Park (83)
- ❑ Evercreech (84)
- ❑ Freycinet National Park – Wineglass Bay (85)
- ❑ Friendly Beaches - from Bicheno or Swansea (86)
- ❑ Goblin Forest Walk - Blue Tier (87)
- ❑ Lagoons Beach – Chain of Lagoons (88)
- ❑ Loon.tite.ter.mair.re.le.hoin.er - Swansea (89)
- ❑ Maria Island National Park (90)
- ❑ Mayfield Beach (91)
- ❑ Moulting Lagoon Game Reserve (92)
- ❑ Mount William National Park or Eddystone Point, Musselroe Bay (93)
- ❑ Ralphs Falls - from Ringarooma or Pyengana (94)
- ❑ St Columba Falls (95)
- ❑ Wielangta Forest Drive (96)
- ❑ Other (Please specify) (997)____________
- ❍ Can't say (998)
- ❍ Not aware of any parks (999)

Appendix 4.Community Monitor – Visitation to parks and reserves

Which Parks & Reserves have been visited the most in 2014?

The most visited Tasmanian Parks or Reserves (all those with over 10% of visitors' attending) in the last 12 months are:

- Cataract Gorge (visited by 47% of all Park and Reserve visitors in the last 12 months)
- Mount Wellington (39%)
- Seven Mile Beach (30%)
- Cradle Mountain National Park (27%)
- Freycinet National Park (25%)
- Port Arthur Historic site (24%)
- Bay of Fires (23%)
- Mount Nelson (23%)
- The Nut (22%)
- Richmond Gaol Historic Site (21%)
- Friendly BeachesHistoric Site (19%)
- Low Head Pilot Station (18%)
- Tamar Island Wetlands (18%)
- Mount Field National Park (17%)
- Liffy Falls (17%)
- Bruny Island (17%)
- Kangaroo Bluff Fort (16%)
- Cascade Female Factoroty Historic Site (16%)
- Franklin and Gordon Wild Rivers (15%)
- Duck Beach (13%)
- Trevallyn Nature Reserve (13%)
- Lake Barrington Rowing Course (13%)
- Tasman Peninsular (13%)
- HollyBank (12%)
- Great Lakes (12%); and
- Mole Creek (11%)
- Ben Lomond (9%)

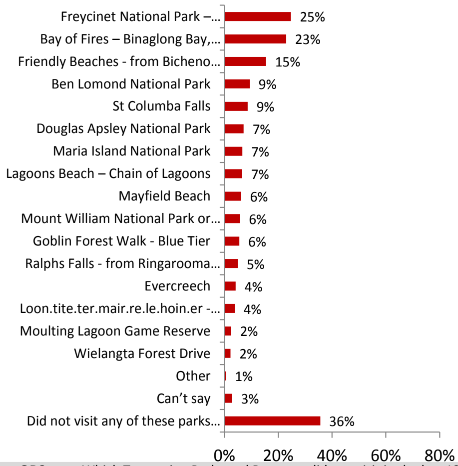
Which Parks & Reserves have been visited in the last 12 months in the East Region?

The most visited parks and reserves in the East Region was Freycinet National Park (visited by 25% of all Tasmanian park and reserve visitors of the last 12 months).

Bay of Fires was visited by 23 per cent of park and reserve visitors and the Friendly Beaches by 19 per cent.

Ben Lomond and St Columba Falls were both visited by 9 per cent of park and reserve visitors and the Douglas Apsley National Park, Maria Island National Park and Lagoons Beach by 9 per cent of park and reserve visitors.

Parks & Reserves visited



Visited by whom?

	Region			
D3g. Visited in the last 12 months– East Region	Hobart	South East	Launceston & North East	West & North West
n=	202	40	126	103
	%	%	%	%
Freycinet National Park – Wineglass Bay	32	22	23	14
Bay of	25	20	29	14
Friendly Beaches - from Bicheno or Swansea	18	22	15	9
Ben Lomond National Park	9	5	12	8
St Columba Falls	8	0	18	2
Douglas Apsley National Park	10	6	5	3
Maria Island National Park	9	21	4	1
Lagoons Beach – Chain of Lagoons	11	12	2	2
Mayfield Beach	10	7	2	4
Mount William National Park or Eddystone Point, Musselroe Bay	6	0	9	4
Goblin Forest Walk - Blue Tier	7	2	7	1
Ralphs Falls - from Ringarooma or Pyengana	3	5	12	0
Evercreech	4	3	8	0
Loon.tite.ter.mair.re.le.hoin.er - Swansea	7	2	3	0
Moulting Lagoon Game Reserve	4	6	2	0
Wielangta Forest Drive	4	2	1	1
Other	1	0	1	0
Can't say	2	2	2	5
Did not visit any of these parks or reserves	24	38	35	58

QD3g. Which Tasmanian Parks and Reserves did you visit in the last 12 months in East Region?
Base: *Visited in the last 12 months - Weighted (n=469)*

D3g. Which Tasmanian Parks and Reserves did you visit in the last 12 months in the East Region?

Please choose all that apply:

Note – the numbers in brackets are the codes for each site –they are not the number or per cent of visitors who visited of each place

- ❑ Bay of Fires – Binaglong Bay, coast camping sites out of St Helens (81)
- ❑ Ben Lomond National Park (82)
- ❑ Douglas Apsley National Park (83)
- ❑ Evercreech (84)
- ❑ Freycinet National Park – Wineglass Bay (85)
- ❑ Friendly Beaches - from Bicheno or Swansea (86)
- ❑ Goblin Forest Walk - Blue Tier (87)
- ❑ Lagoons Beach – Chain of Lagoons (88)
- ❑ Loon.tite.ter.mair.re.le.hoin.er - Swansea (89)
- ❑ Maria Island National Park (90)
- ❑ Mayfield Beach (91)
- ❑ Moulting Lagoon Game Reserve (92)
- ❑ Mount William National Park or Eddystone Point, Musselroe Bay (93)
- ❑ Ralphs Falls - from Ringarooma or Pyengana (94)
- ❑ St Columba Falls (95)
- ❑ Wielangta Forest Drive (96)
- ❑ Other (Please specify) (997)____________
- ❍ Can't say (998)
- ❍ Did not visit any of these parks or reserves (999)

Appendix 5. Values of Ben Lomond National Park

	Value	Development and Management Issues
Ecological Processes	The condition of the soils, vegetation and drainage of the area and is important for the stability of the landscape and vegetation and for sustainable stream flow and water quality. The skifield area is a matrix of rocky exposed slopes, well drained areas, drainage runnels and boggy areas with a variety of alpine plant communities.	Soils, drainage patterns and vegetation are susceptible to damage from clearing and compression and subsequent erosion. Dry summer conditions can affect the success of revegetation. Lessening snow cover and loss of the insulating snow layer may also affect the viability of some vegetation communities through exposure to frost and soil erosion. There has been some damage and erosion due to ski infrastructure, oversnow vehicles and use of machinery. Runoff from the area and from sewage systems has the potential to affect downstream water quality and biota.
Flora	The 2010 Ski Slope Plan indicates that most plant species and communities in the area are well represented and protected in other parts of the Ben Lomond plateau or elsewhere. Two species listed as rare under the *Threatened Species Protection Act 1995* (TSP Act) have been reported near the ski slopes: • *Epilobium willisii* (Carpet Willowherb) – potentially under threat as it was previously reported near Bass Tow in an area that has since been groomed • *Scleranthus brockiei* (Mountain Knawel) – below the car park. Two species with unusual localised occurrence have been reported: • *Podocarpus lawrencei* (the slow growing dwarf Mountain Plum Pine) • *Hymenophyllum peltatum* (a fern).	The 2010 Ski Slope Plan maintains that the two listed species and the two species of interest would not be threatened by implementation of the Ski Slope Plan recommendations or by snow cover. *Epilobioum willisii* near Bass Town may be affected by skiing on thin snow cover. Impacts on flora, including any species listed under the TSC Act, would need to be covered in the environmental impact assessment for any developments. Given apparent lack of recent surveys, a flora surveys is likely to be needed as part of the environmental assessment of any future developments.
Fauna	The 2010 Ski Slope Plan suggests there has not been a detailed fauna survey of the whole area. A range of fauna species is present including more common species such as *Macropus rufogriseus* (Bennett's Wallaby) and *Vomabutus ursinus* (Wombat). *Dasyurua maculatus maculatus* (Spotted-tailed Quoll) has been observed living close to the ski area and village over many years. The Spotted-tailed Quoll is listed as rare	The impacts on listed species would need to be covered in the environmental impact assessment for any developments. Given apparent lack of recent surveys, a fauna surveys is likely to be needed as part of the environmental assessment of any

	Value	Development and Management Issues
	under the TSP Act and as vulnerable under the Commonwealth's EPBC Act. *Aquila audax fleayi* (Wedge-tailed Eagle) has been reported near the ski area but there are no nests within the ski area itself. The Wedge-tailed Eagle is lists as endanged under both the TSP Act and the EPBC Act.	future developments. The 2010 Ski Slope Plan mentions that the area is within the geographic range of the vulnerable *Perameles gunnii gunnii* (Eastern-barred Bandicoot) and the rare *Pseudemoia rawlinsoni* (Glossy Grass Skink).
Geodiversity	The Ben Lomond plateau, including the skifield area, is listed on the Tasmanian Geoconservation Database for its glacial and periglacial features associated with Pleistocene (recent) glaciation.	The 2010 Ski Slope Plan maintains there have been some impacts on these features through rock removal and erosion, but that the affected values are well-represented outside the ski slopes. Impacts on geoconservation values (such as through rock removal and slope grooming) will need to be considered as part of any environmental assessment of developments.
Landscape and Scenic Values	The skifield is situated in a scenic alpine landscape with views of rocky summits and boulder outcrops on the plateau and extensive views out from the plateau. The skifield is adjacent to Legges Tor, the second highest mountain in Tasmania. The ski tows, cleared slopes and village have some visual impact on the natural landscape.	Impacts on landscape and scenic values will need to be considered as part of any environmental assessment of developments. This could also include consideration of ways to minimise visual impacts of infrastructure, equipment and litter in summer.
Cultural and Historic Heritage	The 2010 Ski Slope Plan maintains there are no recorded Aboriginal heritage sites in the ski slope area. There are five historic huts in the ski slope area, four listed on the Tasmanian Heritage Place Inventory but none listed under the *Historical Cultural Heritage Act 1995*.	Impacts on historic heritage places will need to be considered as part of any environmental assessment of developments.
Social Values	The Ben Lomond Skifield has social significance associated with its long term use for snow and mountain recreation. Access to the mountain was pioneered by the Northern Tasmanian Alpine Club in 1929. Accommodation and other ski facilities were developed by, or in association with, various ski and recreation clubs and there is still a strong tradition of community group involvement in management and operation of the skifields. Many Tasmanians value Ben Lomond as the only commercial skifield in Tasmania and many people have long term family connections with ski recreation in the area.	Impacts on social values will need to be considered in relation to any new developments and the way the public is consulted on any proposals.