

The following has been released in relation to a request for information relating to the proposal to scuttle the ex HMAS Darwin off the east coast of Tasmania. The request was for information relating to any environmental, social or economic assessment or advice regarding the proposal. The following report, prepared for the ex HMAS Tobruk proposal in 2016, was identified as information considered in relation to the ex HMAS Darwin proposal.



Proposal for Relocation of the Ex-Hmas Tobruk (II) to Skeleton Bay, Tasmania as a New Artificial Reef and World-Class Dive Tourism Site



5th February, 2016

Prepared by Maura Bedloe Communications for



Proposal for relocation of the ex-HMAS Tobruk (II) to Skeleton Bay Tasmania as a new artificial reef and world-class dive tourism site

This proposal was commissioned by the Break O'Day Council, Break O'Day Business Enterprise Centre and St Helens Chamber of Commerce.

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This document has been prepared by Maura Bedloe Communications, in consultation with the Break O'Day Council, Break O'Day Business Enterprise Centre and St Helens Chamber of Commerce.

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Introduction



Ex-HMAS Tobruk. Source: Department of Defence. © Commonwealth of Australia.

This document outlines a proposal to acquire and relocate the ex-Australian Naval vessel, ex-HMAS Tobruk (II), as a world-class artificial reef and dive tourism attraction at Skeleton Bay, adjacent to Binalong Bay on Tasmania's east coast. Binalong Bay is located at the southern end of the Bay of Fires Conservation Area, a short drive (approximately 10 kilometres) from the vibrant east coast town of St Helens. St Helens is located within the Break O'Day municipality, which encompasses coastal and inland centres on the northern part of Tasmania's East Coast region.



Ex-HMAS Tobruk at sea. Source: Department of Defence. © Commonwealth of Australia.

PROJECT OBJECTIVES

The three primary objectives of the proposed ex-HMAS Tobruk artificial reef development at Skeleton Bay, referred to as the ex-HMAS Tobruk Dive Experience, are:

1. To provide a new, accessible and compelling dive tourism experience in Tasmania at a location that is highly attractive to visitors—including divers and non-divers. This will be the first use of an ex-HMAS ship in Tasmania and will form part of an Australia-wide naval ship-based 'dive trail'.
2. To provide a new, much-needed, tourism-related economic stimulus to Tasmania's East Coast region, as part of its economic restructuring away from forestry/wood chipping.
3. To provide a new dive centre and museum, located in St Helens, which will support dive activities for the ex-HMAS Tobruk and feature interpretive displays and information about the vessel, diving and dive tourism, and the local area.

RATIONALE

Intelligent, targeted and sensitive development is critical to the ongoing health and growth of the region's economy, community and tourism industry. The Break O'Day municipality has the highest unemployment and oldest demographic of any Local Government Area in Tasmania, and is heavily dependent on tourism.

While the East Coast region is widely perceived as a highly desirable summer holiday destination, with a heavy focus on coastal activities, visitation is seasonal, with a typical drop off during the autumn/winter seasons. Ensuring that the region offers a range of high-quality visitor experiences that have appeal across these shoulder and low seasons is critical to the health of the local tourism industry and economy.

The location of six other ex-naval vessels as artificial reefs in mainland Australian communities has been shown to bring enormous economic, tourism, environmental and community benefits. Creating a world-class diving and visitor experience at Skeleton Bay via the ex-HMAS Tobruk will result in increased visitation to the region (particularly across the shoulder and winter seasons), increased spend in the local economy, local employment and business growth and an enhanced international media profile for the East Coast region and the state. The acquisition of this historically significant naval vessel would be a major draw card for Tasmania and a catalyst for further positive development within the local area, transforming Skeleton Bay into a world-class dive destination.

The ex-HMAS Tobruk Dive Experience at Skeleton Bay will be a major development project that will bring far-reaching benefits to the local area, the region and Tasmania as a whole, while creating minimal physical impact on the local community in terms of new infrastructure. In short, the ex-HMAS Tobruk is a potential game changer for Tasmania's east coast economy.

Bringing the ex-HMAS Tobruk to Tasmania's east coast will create a dive tourism site of world significance, and a protected artificial reef that will support abundant marine life within one of Tasmania's most iconic natural areas. The development will provide a vital boost for the local economy through sustainable increased tourism visitation to the area while also creating a new and protected habitat for local marine species. It will also establish Tasmania's first ex-naval vessel artificial reef, bringing the state into a national 'dive trail' of highly sought-after ex-naval vessel diving experiences across Australia.

Significant work has already been undertaken to assess the viability of the project, including:

1. A comprehensive business case and investment analysis—***Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case***, Dr R. R. Noakes, December 2015.¹ Dr Noakes' report was prepared to present the results of a range of financial and economic analyses for the project. The findings specifically relate to the preparation of an overall business case with two key components:
 - to support and justify public sector investment in the development of a new dive site with the seabed placement of the ex-HMAS Tobruk by completing an economic appraisal of the likely viability of the project
 - to examine the long-term financial viability of the dive site and the dive centre, and sustainability of the naval dive attraction, following its placement, to demonstrate the long-run financial viability of the attraction and the dive centre.
2. A detailed environmental assessment—***A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania***, Marine Solutions Tasmania Pty Ltd, July 2014.² This document was prepared to determine the environmental feasibility of scuttling the ex-HMAS Tobruk as an artificial reef in Skeleton Bay.

All investigations to date confirm the viability, suitability and potential benefits of establishing the ex-HMAS Tobruk as an artificial reef and dive site at Skeleton Bay.

The information in this proposal is drawn from both of these reports, in addition to a range of other research and information from third party sources (see *Sources and Acknowledgements* and *Appendices*).

1 See Appendix 1

2 See Appendix 2

Part 1: Background





Ex-HMAS Tobruk at sea. Source: Department of Defence. © Commonwealth of Australia.

ABOUT THE EX-HMAS TOBRUK (II)

The ex-HMAS Tobruk (II) is a Landing Ship Heavy (LSH) of the Royal Australian Navy (RAN). The ex-HMAS Tobruk was launched on 1st March, 1980, and commissioned into the Royal Australian Navy in 1981.

The ex-HMAS Tobruk was designed for combined Navy and Army amphibious operations—a multi-purpose troop and heavy vehicle carrier with facilities for bow and stern loading, beaching, and capacity for drive-through and inter-deck transfers via ramps.

The ex-HMAS Tobruk could transport up to 18 tanks in the tank deck, and more than 40 armoured personnel carriers or light armoured vehicles on the vehicle deck, which had been reinforced to enable the transportation of two landing craft mechanical-8s (LCM-8) on specially designed cradles. Two landing craft vehicular personnel units (LCVP) could also be secured to the vessel on either side of the superstructure. The ship's roll-on/roll-off function was supplemented by two 8.5 ton cranes and a 70 ton derrick. The vessel also had forward and aft helicopter decks, which could be operated simultaneously.

The ex-HMAS Tobruk could accommodate up to 300 troops for extended periods, and up to 520 troops in an overloaded state.

During her service, the ex-HMAS Tobruk sailed over 947,000 nautical miles (1,754,000 km/ 1,090,000 mi), and was deployed on 26 major operations—more than any other Australian Defence Force (ADF) unit. Her last 20 missions were peacekeeping exercises.

Ex-HMAS Tobruk returned to her home port of Sydney for the last time on 25th June, 2015. Her final voyage was recognised in Federal Parliament with both the Prime Minister and Opposition Leader acknowledging her service to the nation, noting that she lived up to her motto of Faithful and Strong.

The ex-HMAS Tobruk (II) was decommissioned on 31 July 2015 after 35 years of dedicated service.



Ex-HMAS Tobruk decommissioned in Sydney, 31st July, 2015. Source: Department of Defence. © Commonwealth of Australia.

Class	Modified Sir Bedevere Class
Type	Landing Ship, Heavy (LSH)
Roles	Amphibious warfare
Pennant	L50
Motto	'Faithful and Strong'
Home port	Fleet Base East
Builder	Carrington Slipways Pty Ltd
Laid down	7th February, 1978
Launched	1st March, 1980
Commissioned	23rd April, 1981
Decommissioned	31st July, 2015
DIMENSIONS AND DISPLACEMENT	
Displacement	3353 tonnes (5791 tonnes loaded)
Length	127 metres
Beam	18.3 metres
Draught	4.9 metres

EX-NAVAL VESSEL DIVE SITES IN AUSTRALIA

An estimated 40 countries currently operate artificial reef dive sites, and the use of ex-naval vessels as artificial dive reefs is popular worldwide with recreational divers. In the past two decades, six decommissioned naval vessels have been scuttled and established as artificial reefs in Australia, each of which attracts a wide range of divers and their families in addition to domestic and international visitors. To date, the annual diver demand and resultant economic impact for all six locations has been significant:³

TABLE 1: COMPARABLE DEMAND AND BENEFITS OF EX-HMAS VESSEL REEFS

VESSEL	DATE OF PLACEMENT	LOCATION (OFF-SHORE)	ANNUAL DIVER DEMAND	ANNUAL ECONOMIC IMPACT (\$M)
Ex-HMAS Swan	1997	Busselton, WA	4,000	\$3.5-\$3.8
Ex-HMAS Perth	2001	Frenchmans Bay/Albany, WA	3,000 (est)	\$3 (est)
Ex-HMAS Hobart	2002	Yankallia/Normanville, SA	4,000	\$3.5
Ex-HMAS Brisbane	2005	Mudjimba Island/ Maroochydore, QLD	5,300	\$4.4+
Ex-HMAS Canberra	2009	Ocean Grove/Queenscliff, VIC	7,000	\$5.5-\$6
Ex-HMAS Adelaide	2011	Terrigal/Avoca NSW	5,000	\$4.5-\$5.5

* Dive demand is based on the actual estimated purchases of dive permits. Visits to the dive site by outdoor boating groups represent additional visitor demand, which is not included. Families of divers regularly visit the dive sites and are not included in the estimated demand. The economic impact of the dive experience thus covers more than just the dive experience, in terms of total visitor expenditures for the local economies involved.

** This figure is based on the 31st December, 2015 estimate for ex-HMAS Brisbane dive permit sales. This excludes the number of day trips to the exclusion zone by recreational boaters and sightseeing groups (estimated at between 1,500 to 2,000 additional visitors).

Worldwide, dive tourism has emerged as a 'boom' coastal tourism activity, resulting in significant pressures on natural marine resources and dive locations. The concept of creating artificial reefs has therefore become widely popular to meet demand and reduce impact on natural reefs.

Each of the six established Australian sites is now a thriving aquatic habitat that hosts abundant and diverse marine life, attracting scuba divers and other visitors to the local region and creating significant positive economic and tourism impact for local communities.

3 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p. 2



CASE STUDY—THE EX-HMAS BRISBANE

'Artificial reefs generate millions of dollars in revenue each year.' (Dr Vikki Schaffer)

The ex-HMAS Brisbane is a former warship of the Royal Australian Navy (RAN), which was scuttled in 2005 on southeast Queensland's Sunshine Coast as an artificial reef and dive site. The vessel is located in 28 m of water, nine kilometres offshore from Mooloolaba, within the ex-HMAS Brisbane Conservation Park. This well-established site is now recognised as one of Australia's premier dive destinations.

Dr Vikki Schaffer, PhD, BSustTour, BA (Hons), wrote her 2011 thesis—Valuing artificial reefs: the case of the ex-HMAS Brisbane Conservation Park—to measure the economic, social and environmental value of the artificial reef for the local community.

Dr Schaffer's research showed that **19,752 scuba permits** were issued for the ex-HMAS Brisbane Conservation Park in the **first four years** after scuttling (from August 2005 to June 2009)⁴—an average of **4,938 scuba divers per year**.

Dr Schaffer successfully surveyed 894 divers during a 12-month research period (early March 2008 to end February 2009). Of these, 116 (13%) were local divers and 778 (87%) were tourist divers (international and domestic). Divers were surveyed for a range of data, including length of stay and expenditure. The **average stay** for visiting divers was **6.605 nights**.

The survey results showed that the **894 divers** surveyed had a **total expenditure of \$720,400**, with an **average expenditure of AU\$805.82 per diver**. This expenditure was shared between various categories, including **food and beverage, the dive experience and accommodation**.

TABLE 2: TOTAL AND AVERAGE EXPENDITURE - EX-HMAS BRISBANE CONSERVATION PARK

	TOURISTS (778)	LOCALS (116)	TOTAL (894)
Total spending AU\$	680,543	39,857	720,400
Average spending per diver AU\$	874.73	343.59	805.82
Standard deviation*	1270.69	479.54	1121.28
Median AU\$	400	250	400

*High standard deviation (SD) scores were due to the wide range of estimated expenditure by divers. Median scores are provided, as only looking at average spending is problematic, as mean scores are affected by those divers who spent large sums, which are not representative of the general spending estimates.⁵

The **estimated total economic value** of the ex-HMAS Brisbane Conservation Park was determined by multiplying the total number of scuba diving permits issued over the four years of operation from 2005-2009 (19,752) by the total average expenditure by visiting divers, measured during the 12-month survey period from March 2008-February 2009 (\$874.73). The total economic value of the Park was therefore estimated at a staggering **\$17,277,667 over four years**, or an average of **\$4,319,417 per year**.

In addition to the outstanding economic value of the Conservation Park, Dr Schaffer's study also concluded that the ex-HMAS Brisbane artificial reef **created positive environmental value** for the local community.

4 Valuing artificial reefs; the case of the ex-HMAS Brisbane Conservation Park, Dr Vikki Schaffer, BBus (Hons) USC, March 2011 (Chapter 4, Results: Economic Value, Section 4.2, Profile of Respondents), p. 116

5 Valuing artificial reefs; the case of the ex-HMAS Brisbane Conservation Park, Dr Vikki Schaffer, BBus (Hons) USC, March 2011 p. 120

Experts consulted for the study concluded that this type of reef development contributes positively to local environmental value, creates new habitats, provides corridors for mobile species and conserves pre-existing habitats. The Environmental Protection Agency of Queensland stated that the Conservation Park reef is a marine fisheries habitat that is expected to be an oasis, offering ideal conditions for divers to explore the abundant marine life of the site. Surveyed divers who visited the site three years after scuttling reported an abundance and diversity of marine species and considered their diving experience as highly positive, with a rating of 6.07/7.

Additionally, Dr Schaffer's thesis concluded that the ex-HMAS Brisbane made a **positive social contribution** to the local community by being the catalyst for the creation of a collaborative network of local businesses, government departments and community organisations.⁶

Dr Schaffer's research clearly shows the highly significant and positive economic, social and environmental value to the host community generated by the presence of the ex-HMAS Brisbane.



⁶ Valuing artificial reefs; the case of the ex-HMAS Brisbane Conservation Park, Dr Vikki Schaffer, BBus (Hons) USC, March 2011, pp. 161-162

WHY TASMANIA SHOULD RECEIVE THE EX-HMAS TOBRUK

As evidenced by Dr Schaffer's study of the ex-HMAS Brisbane, the value of ex-naval vessel artificial reefs to other Australian coastal communities is both significant and far-reaching. Tasmania is currently the only state in Australia that does not have an ex-naval vessel purposed as an artificial reef and dive site.

The creation of an ex-naval vessel artificial reef at Skeleton Bay will create a major new tourism sector stimulus for Tasmania's East Coast region. It will provide employment opportunities and economic growth for the depressed local and regional economy, create new forms of diving opportunities, enhance recreational fishing, and promote local tourism, with additional employment, investment and greater utilisation of the region's existing tourism infrastructure. The proposed artificial reef will have high appeal for Australian and international divers, and will place St Helens and Binalong Bay on a national 'dive trail' for dive tourists who will be drawn to Tasmania from across the world.

The advantage of being the 'last' Australian state to acquire an ex-naval vessel as an artificial reef, is that the precedent for this experience has already been set multiple times. By observing and learning from the experience of other sites, Tasmania can ensure world's best practice in the preparation of the vessel and dive site and provide the finest artificial reef diving experience in this country.





ABOUT TASMANIA'S EAST COAST

East Coast Economic Profile

The economy of Tasmania's East Coast region is highly dependent on tourism. The East Coast is the sixth most tourism-dependent region in Australia (Tourism Research Australia 2012).

TABLE 3: EAST COAST ECONOMIC PROFILE

RANK	REGION	STATE	ECONOMIC IMPORTANCE OF TOURISM
1	Central	NT	24.8%
2	Phillip Island	VIC	18.7%
3	Whitsundays	QLD	17.7%
4	Snowy Mountains	NSW	17.1%
5	West Coast	TAS	16.2%
6	East Coast	TAS	14.6%

The tourism industry also generates 20% of the employment within the region (Remplan, 2012):

TABLE 4: EAST COAST ECONOMIC SECTORS

SECTORS OF THE ECONOMY (EAST COAST TAS)	EMPLOYMENT IMPORTANCE	TOTAL EAST COAST JOBS	TOTAL ECONOMIC OUTPUTS
Tourism	20%	600	\$102 M
Agriculture, forestry, fishing	13%	395	\$112 M
Health card and social assistance	10%	316	\$28 M
Education and training	8%	262	\$25 M
Manufacturing	6%	199	\$117 M
Public administration	6%	195	\$31 M
Construction	5%	168	\$52 M
Mining	2%	62	\$105 M
TOTAL		3062	\$759 M



St Helens and Binalong Bay fall within the Break O' Day Council municipality. Break O' Day also includes the coastal towns of Scamander, Falmouth, Four Mile Creek, Beaumaris, Stieglitz, Seymour and Ansons Bay; inland population centres including St Marys, Fingal, Mathinna, Mangana, Cornwall, Pyengana, Goshen and Weldborough; and national parks and conservation areas including the Bay of Fires, Mount William National Park, St Columba Falls, the Blue Tier and portions of the Douglas Apsley National Park.

The principal industries for the Break O' Day area are tourism, agriculture, forestry, fishing, aquaculture and mining.

According to the Index of Relative Socio-economic Disadvantage (for Tasmania), Break O' Day is ranked as the third most disadvantaged Local Government Area (LGA) in Tasmania (and the 48th most disadvantaged in Australia).⁷ This region has experienced significant economic downturn in recent years, as a result of the long-term decline in traditional resource sectors within the state. This decline has resulted in jobs losses in several of the key resource industries that have historically been a key part of the local economy, particularly forestry and fishing.⁸

In addition, Break O' Day has an ageing population, with a median age of 51.1.⁹ There is a clear need to grow the local population and drive increased business and employment opportunities in key sectors, including the rapidly growing tourism sector. The BODC's Economic Development Strategy has a primary objective of:

*'...growing the region (through a larger population and stronger tourism sector) to generate sustainable jobs (in key sectors including services). This growth needs to be supported through improvements in town centres and economic and community infrastructure.'*¹⁰



7 Economic Development Strategy, Break O' Day LGA, Michael Connell and Associates, August 2013, p. 17

8 Economic Development Strategy, Break O' Day LGA, Michael Connell and Associates, August 2013, pp. 3-4

9 Australian Bureau of Statistics, <http://stat.abs.gov.au/itt/rjsp?databyregion>

10 Economic Development Strategy, Break O' Day LGA, Michael Connell and Associates, August 2013, p. 7



Tourism On The East Coast

Tasmania's East Coast region is traditionally perceived as a summer holiday destination and is highly seasonal, with a three-to-five month peak operating season that extends from late spring through to early autumn. The region's peak tourism body is the East Coast Regional Tourism Organisation (ECRTO), whose stated purpose is:

*'To create economic and social benefits by increasing visitation, visitor expenditure, longer stays and extending the visitor season through the promotion of year round experiences and events.'*¹¹

ECRTO's business goal is to grow the visitor economy on the east coast, particularly in the shoulder and low seasons (autumn/winter). ECRTO and the Tasmanian Liberal Government have invested significant resources towards this goal through a range of initiatives, including the Just Stop and Great Eastern Drive marketing initiatives in 2014 and 2015-16.

East Coast Core Attributes

Some of the core appeals of Tasmania's east coast for visitors are its wildlife, nature and wilderness, and opportunities for adventure experiences. The region's extraordinary coastline and beaches, national parks and accessible wilderness and wildlife are attributes that have earned the East Coast region a range of accolades and an established international reputation as a desirable holiday destination:

- **The Bay of Fires** – named by Lonely Planet as the hottest travel destination in the world and the location for the multiple award-winning Bay of Fires Walk, named one of the eight Great Walks of Australia. Binalong Bay is located at the southern end of the Bay of Fires Conservation Area.
- **Freycinet National Park and Wineglass Bay** – named one of the top 10 beaches in the World by Frommers Travel Guide. The multiple award-winning Freycinet Experience Walk, at Friendly Beaches has been named one of the eight Great Walks of Australia.
- **Maria Island National Park**, including Darlington Probation Station, listed as part of the 11 Australian Convict Sites World Heritage Property by the United Nations Education Scientific and Cultural Organization (UNESCO). Location for the multiple award-winning Maria Island Walk, also named one of the eight Great Walks of Australia.

The region is a hub for adventure tourism activities, particularly centred on the incredible coast. Scuba diving, snorkeling, surfing, kayaking, swimming, cruising, sailing and fishing are all popular here, and a range of high quality and award-winning commercial operators are established throughout the region.

The region also has abundant opportunities for land-based adventure activities, including bushwalking, cycling and mountain biking. The exciting new Blue Derby Mountain Bike Trails (MBT), are located just north of St Helens, between the Blue Tier and Weldborough, near the historic town of Derby. This newly developed, world-class network of single-track mountain bike trails is already attracting international attention and complements the existing, globally recognised walking and outdoor experiences available at the nearby Bay of Fires. St Helens is the gateway to both of these incredible adventure activities.

¹¹ East Coast Tasmania Regional Tourism Organisation, Annual Report, 2014-2015, p. 4



The iconic Blue Derby Mountain Bike Trail is due for completion in mid-2016 and will result in 80 kilometres of trails. The development recently received the Award for Excellence in Economic Development at the Economic Development Australia Conference, and will also be the location for a new, premium three-day mountain bike experience that will combine riding on 100 kilometres of mountain bike trails in the Hollybank, Derby, Blue Tier and Weldborough areas with accommodation in unique eco-pod accommodation. Planning is also underway to link the Blue Tier to the Bay of Fires and St Helens as part of Stage Two of the Blue Derby MBT.

The ex-HMAS Tobruk Dive Experience will closely align with and enhance the existing adventure experiences available within the East Coast region and create a world-class aquatic adventure experience that will be unique in the state.

East Coast Target Markets

The primary target market for the region is **Lifelong Learners**. In recent years, Tourism Tasmania (TT) has focused its marketing effort on Lifelong Learners—the group of visitors identified as most likely to be influenced to visit Tasmania. Lifelong Learners are more likely to consider travel to Tasmania (39%) than the average Australian traveller (33%) (Tourism Information Monitor/TIM).

Lifelong Learners fall into two distinct age brackets:

- couples, aged 40+, seeking a touring experience
- couples aged 25-39, seeking a short break.

Lifelong Learners:

- live primarily in metropolitan areas of the eastern seaboard of Australia
- have an interest in exploring and learning more about themselves and the world
- prefer less crowded, more interesting destinations for their holidays
- want to keep learning and have a positive outlook on life
- take a holiday to discover and understand new people and places or to escape and spend time together, creating new memories.



Mountain bikers. Photo by Heath Holden.



They also:

- stay longer and spend more
- have a higher than average household income
- are well-educated and informed on a range of subjects
- enjoy travel as an important part of their lifestyle
- love food and eating out, the beach, national parks and bushwalking
- travel beyond major cities and like meandering and exploring to find more interesting and rewarding holidays
- are inquisitive and will try new things
- desire shared authentic personal experiences, beyond the routine of everyday life
- like to be immersed in the moment and see possibility in every journey
- like meeting and interacting with the locals.

The motivations and characteristics exhibited by Lifelong Learners align intimately with the East Coast's core attributes and are shared by dive tourists and visitors who will form the core market for the ex-HMAS Tobruk Dive Experience.

Tourism Visitation On The East Coast

Tasmania's East Coast region is currently experiencing increased tourism visitation, with visitor numbers growing by more than any other region in the state. In the year ending June 2014, visitation to the region **increased by 16%—the highest of any Tasmanian region**—and in the year ending June 2015, visitation **increased by 12% to 315,300 visitors—equal highest visitation with the southern Tasmanian region**.

The most recent visitation figures for the region show a 14% growth, year-on-year to September 2015 and a startling **25% growth in visitors to the East Coast region, year-on-year for the July-September 2015 quarter**.

TASMANIAN VISITOR FIGURES

For the year ending June 2015:

- there were 1.15 million visitors to Tasmania; an increase of 8% from 1.06 million in the previous year
- total nights spent by visitors in the state increased by 3% to 9.72 million
- visitor expenditure increased by 9% to \$1.89 billion
- the number of interstate visitors to Tasmania increased by 9% to 988,000 (was 909,900).

EAST COAST VISITATION

For the year ending June 2015, data from the Tasmanian Visitor Survey (TVS) for the four tourism regions reported the following changes in visitor numbers: Southern, up 12 per cent; East Coast, up 12 per cent; Northern, up 6 per cent; Cradle Coast, up 10 per cent:

TABLE 5: EAST COAST VISITATION

REGIONS VISITED	YEAR ENDING JUNE 2014	YEAR ENDING JUNE 2015	% CHANGE
East Coast	281,100	315,300	Up 12%
Southern	833,800	937,300	Up 12%
Cradle Coast	421,100	461,100	Up 10%
Northern	570,300	604,900	Up 6%

Tasmanian Tourism Snapshot, year ending June 2015.

In addition, the Regional Tourism Snapshot's Quarterly Regional Visitation Comparison showed a huge, 28% increase in visitation to the region for the January-March 2015 quarter (note: these figures do not include intrastate visitors):

TABLE 6: QUARTERLY REGIONAL VISITATION COMPARISON (TVS)

	SOUTHERN	EAST	NORTHERN	NORTH WEST	WEST COAST
January-March 2014	280,312	107,428	191,413	150,032	69,911
January-March 2015	323,265	137,586	221,660	180,299	78,707
Growth	15%	28%	16%	20%	13%

Regional Tourism Snapshot, East Coast Tasmania, TVS year ending March 2015

INCREASING VISITATION TO THE EAST COAST IN THE SHOULDER AND WINTER SEASONS

Visitation to the region has traditionally been low in the shoulder and winter seasons. A key strategy underpinning the Just Stop and Great Eastern Drive campaigns has been to boost visitation to the East Coast region in these traditionally quieter periods.

In Tasmania, the best conditions for scuba diving occur in autumn and winter. The ex-HMAS Tobruk Dive Experience will create an opportunity for a world-class adventure tourism experience on the east coast with great potential to attract increased visitation during the region's traditionally quiet shoulder and low seasons. The importance of this cannot be overstated as this additional visitation will have a direct, positive impact on local businesses, through generating increased income and opportunities, and extending the visitor season, thereby enabling businesses to be sustainable and viable over the autumn and winter period.

Diving on the ex-HMAS Tobruk will be a complete interpretive experience, enhanced by the creation of the dive centre and museum, and complemented by the diverse range of visitor experiences in the region—including Tasmanian food and wine, opportunities to explore the local region including the nearby Bay of Fires, a huge range of touring opportunities along the Great Eastern Drive, and the opportunity to extend the diving experience offered at the ex-HMAS Tobruk site by exploring other dive sites along the east coast's Tasmanian Dive Trail.

Alignment With Tourism Australia's Aquatic And Coastal Strategy

Tourism Australia's (TA) latest consumer research shows that 70% of international tourists to Australia took part in an aquatic or coastal experience as part of their trip.

In early 2016, Tourism Australia will launch a new \$40 million multi-platform marketing campaign that will showcase one of Australia's key competitive advantages—our aquatic and coastal offering.

The campaign, which is part of TA's 'There's Nothing Like Australia' marketing initiative, aims to renew and reinvigorate awareness among international visitors of Australia's extraordinary coastal and aquatic destinations and experiences.

Establishing the ex-HMAS Tobruk as an international-standard aquatic experience in Tasmania will enable the state to leverage off this renewed focus on coastal and aquatic visitor experiences and the increased profile created by TA's campaign.





DIVE TOURISM

Dive tourism is a global industry and key segment in the worldwide adventure tourism market. The United Nations World Tourism Organization's (UNWTO) 2014 Global Report of Adventure Tourism identifies this sector as one of the fastest growing categories of the global tourism sector, and further says that:

'Adventure tourism is resilient, attracts high-value customers, supports local economies and encourages sustainable practices.'

'Because of its documented benefits to the environment, local people and local economies, governments are increasingly identifying adventure tourism as a tool for sustainable and responsible economic growth that delivers benefits to every level of society.'

'Increasingly, countries in all stages of economic development are prioritizing adventure tourism for market growth because they recognize its ecological, cultural and economic value.'¹²

In 2008, the UNWTO¹³ suggested that dive tourism would soon be as important as ski and snow tourism.

¹² United Nations World Tourism Organisation (UNWTO), Global Report on Adventure Tourism, 2014

¹³ United Nations World Tourism Organisation (UNWTO), Business Economics: Climate Change and Tourism: Responding to Global Challenges, 2008



Who Are Dive Tourists?

The UNWTO identifies two categories of dive tourists:

- The **scuba diving tourist** who travels to destinations with the main purpose of their trip being to partake in scuba diving. The attraction of the destination is almost exclusively related to its dive quality, rather than any other factor.
- The **occasional diver**, for whom the timing of their holiday and choice of tourism destination will have little to do with the availability of opportunities to dive, and more to do with the quality of the tourist destination, i.e. restaurants, accommodation and other land-based attractions.

Both types of dive tourists benefit from the creation of new dive attractions.

Dive tourists are highly mobile and willing to travel to the dive sites they are interested in experiencing. Scuba diving is an expensive sport, and dive tourists typically have a high disposable income. Many divers have a 'to-do list' of dive sites they wish to visit, and this trait is especially true of divers with an interest in significant wrecks and/or ex-naval vessel sites.

Divers are also likely to stay overnight in a destination, due to the recommended diving after flying period of 12-18 hours.

Value Of Dive Tourism

The recreational scuba dive sector is one with enormous economic potential. While little research has been undertaken to date to measure the extent of the sector's true impact on the Australian economy, a recent study by the Centre for Conservation Geography estimates that dive-related spending in Australia is potentially worth as much as **\$2.2 billion per year**.¹⁴

The report also quotes Tourism Research Australia's (TRA) National Visitor Survey (NVS) figures for the year ended June 2014, which showed that **156,000 domestic overnight visitors** and **279,655 international visitors** participated in scuba diving across Australia.

Typically, recreational divers:

- usually travel in pairs or groups (due to the 'buddy system' of diving)
- require high-level support facilities (e.g. dive centres, equipment hire, accommodation, food and dining, fuel, vehicle hire)
- plan trips across several sites/locations, and often have a list of 'must-do' dive destinations.

¹⁴ The Scuba Dive Industry in Australia: Towards Estimates of Economic Size and Impact, Centre for Conservation Geography, March 2015

DIVING IN TASMANIA

'Every dive in Tasmania displays an exquisite combination of lyrical beauty and the wistfully bizarre.'
 David Doubilet, National Geographic Magazine.

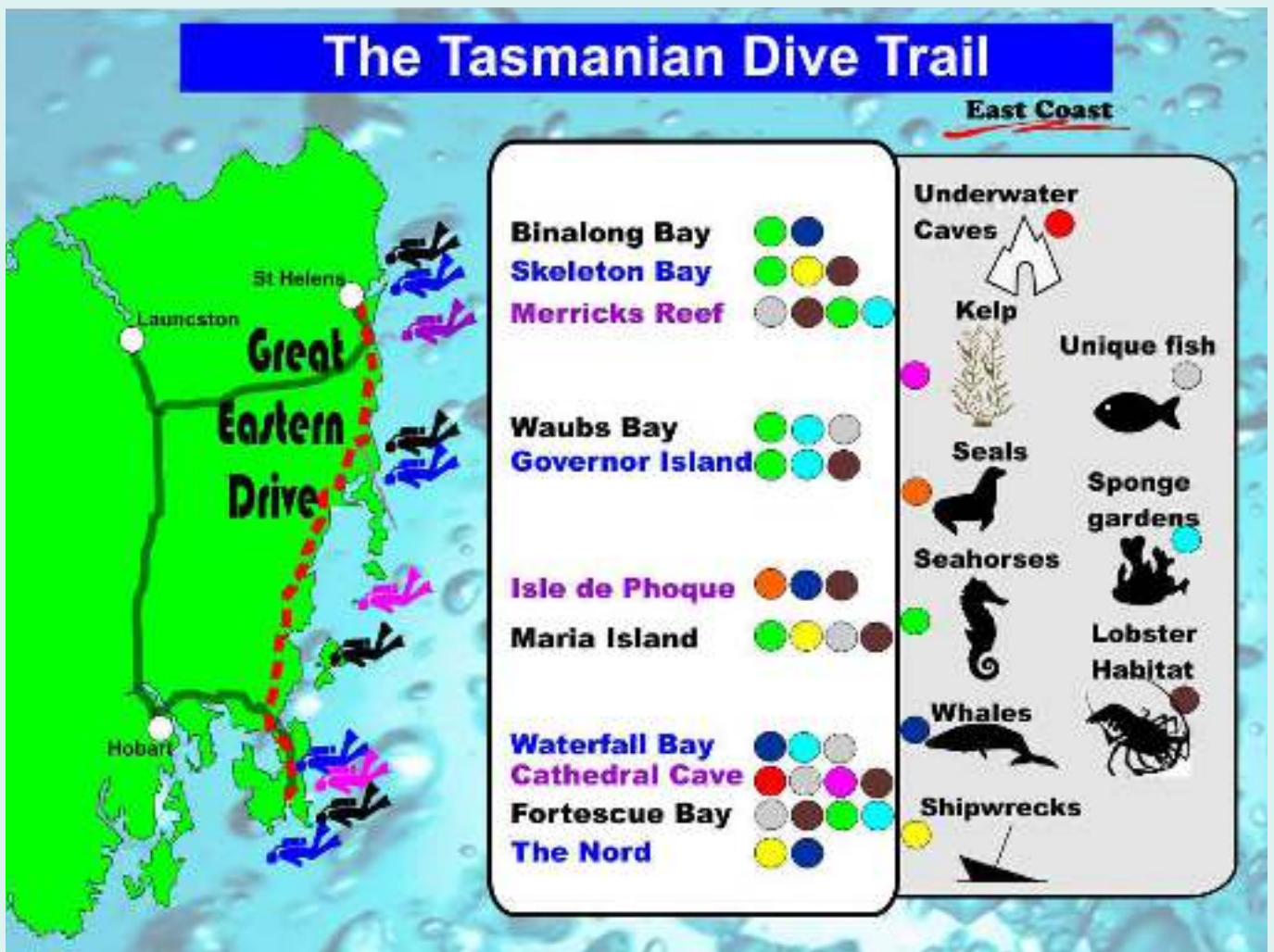
Tasmania's unspoiled marine environment and extraordinary coastline offers countless diving and snorkeling opportunities for visitors with a range of experience levels. The best diving in the state occurs on the east coast, where underwater visibility ranges from 10 to 40 metres during the year. Here, clear turquoise water and exceptional visibility invites divers into a unique subaquatic environment that is brimming with marine life. Dive locations range from giant kelp forests and lush seagrass beds to natural reefs, caves and historic shipwrecks. A stunning range of diverse marine life is also encountered here, including countless fish species, sea horses and seadragons, colourful invertebrates and marine mammals including fur seals, dolphins and whales. Dive sites include marine reserves at Governor Island and Maria Island National Park, and the state's maritime history can be experienced on wreck dives including the SS Nord, off Tasman Island.

Autumn and winter are prime seasons for diving here, with maximum visibility, uncrowded diving destinations and a calm, settled east coast climate.

The Tasmanian Dive Trail

The Tasmanian Dive Trail encompasses some of the state's prime diving experiences, located along Tasmania's eastern coastline, from Flinders Island in the north, to Bruny Island in the south.

Binalong Bay/Skeleton Bay is a key location on the Dive Trail and offers stunning, easily accessible diving and snorkelling options in locations ranging from coastal lagoons and bays to offshore white sand gullies, kelp gardens and natural reefs teeming with fish.



Artificial Reefs In Tasmania

The great attraction of diving on artificial reefs is the opportunity to observe the abundant marine life that thrives in such an environment. Shipwrecks and scuttled vessels typically foster abundant populations of marine vegetation, colourful corals and invertebrates, and can attract a huge diversity of sealife. While Tasmania, and in particular, the east coast, does offer opportunities to dive artificial reefs—such as the SS Nord off Tasman Island, and the Troy D off the coast of Maria Island—there are no diving experiences in Tasmania comparable to the proposed ex-HMAS Tobruk Dive Experience.

Comparing The Troy D And Ex-Hmas Tobruk

The Troy D, a 55-metre former Hopper Barge, was scuttled four kilometres off the northern tip of Maria Island in 2007. While the site is now an established artificial reef, it presents a number of challenges for divers. The location of the vessel—off the coast of Maria Island, which is itself located 16 kilometres off the coast of Tasmanian mainland—makes access difficult and time consuming. There is a lack of nearby infrastructure and essential services, such as a dive centre or medical services, to support any level of consistent dive tourism. In addition, the depth of the vessel (23-27 metres) and its susceptibility to strong currents makes the Troy D a dive for experienced divers only.

The Troy D is not a comparable site to the proposed ex-HMAS Tobruk artificial reef, which will offer a highly accessible and rewarding diving experience in an optimum location for divers of all experience levels, and which will be well supported by local infrastructure and services. The vessel itself will be a unique and compelling diving experience and Skeleton Bay is an ideal dive site, which offers:

- a sheltered location, being protected by Eddystone Point in the north and Grants Point to the south
- optimum depth for recreational diving, with depths at the ex-HMAS Tobruk site ranging from no more than six metres at its shallowest point to 34 metres at its deepest
- excellent in-water visibility, ranging from 10-30 m, depending on the time of year (best visibility is during the autumn and winter months)
- low current velocities, which the Environmental Assessment has found to 'not restrict diving activities at the proposed scuttling site'¹⁵
- easy access for divers (within one kilometre of the Binalong Bay boat ramp) and close proximity to visitor, health and emergency services in nearby St Helens
- a range of established natural dive sites located close to the proposed ex-HMAS Tobruk site, which present suitable, shallow water follow-up dives.

Dive tourism is a growth market for Tasmania. While the state already has a range of high-value natural dive sites, a critical factor in attracting this lucrative segment will be the provision of compelling and accessible diving experiences and infrastructure.

The ex-HMAS Tobruk represents an opportunity for Tasmania to take advantage of the growing international and domestic demand for unique diving experiences—such as those presented by ex-naval vessel artificial reefs.

¹⁵ A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Pty Ltd, July 2014, p.20





Part 2: Proposal For The Ex-Hmas Tobruk Dive Experience



THE EX-HMAS TOBRUK DIVE EXPERIENCE

Diving on the ex-HMAS Tobruk will be a compelling experience that will attract divers from all over the world. Diving opportunities on ex-naval vessels of this kind are highly rated by divers across the globe as ‘must-do’ experiences.

Locating the ex-HMAS Tobruk at Skeleton Bay brings additional advantages for divers of experiencing the stunning marine environment of the Bay, encountering Tasmania’s unique marine life, and enjoying a range of high quality, accessible follow up dives on the edge of a world-renowned coastal destination—the Bay of Fires Conservation Area. The proposed dive site is easily accessed from St Helens and Binalong Bay and divers will also have immediate access to the east coast’s extraordinary destinations and visitor experiences via the Great Eastern Drive, voted Australia’s greatest road trip by Australian Traveller Magazine. In addition, the St Helens Airport provides all-weather access for charter flights direct from mainland centres including Sydney and Melbourne.

The Dive Experience

The natural environment of Skeleton Bay is characterised by its brilliant, white sandy seafloor, kelp-covered natural reefs and rock bommies.

This is a rich habitat for a huge diversity of sealife, including schools of fish, fixed marine species, crayfish, abalone, and the fascinating weedy sea dragon. Dolphins and whales are also regular visitors. The Bay’s natural features include boulders, caves and swim-throughs in depths of 10-20 metres, which are havens for marine life.

The dimension and features of the ex-HMAS Tobruk will create a world-class diving experience within this extraordinary location. The ex-HMAS Tobruk is unlike any other naval dive site in Australia, with a unique design compared to other vessels. At 127 m long, the ex-HMAS Tobruk is comparable in length to most naval destroyers, but is almost twice the width. Large flat areas combine with accessible walkways, and the huge, open bow doors of the vessel will give divers a stunning swim-through experience, as they enter the ship’s interior and explore this vast craft from within. There is also potential to light sections of the vessel for an unforgettable night dive experience.

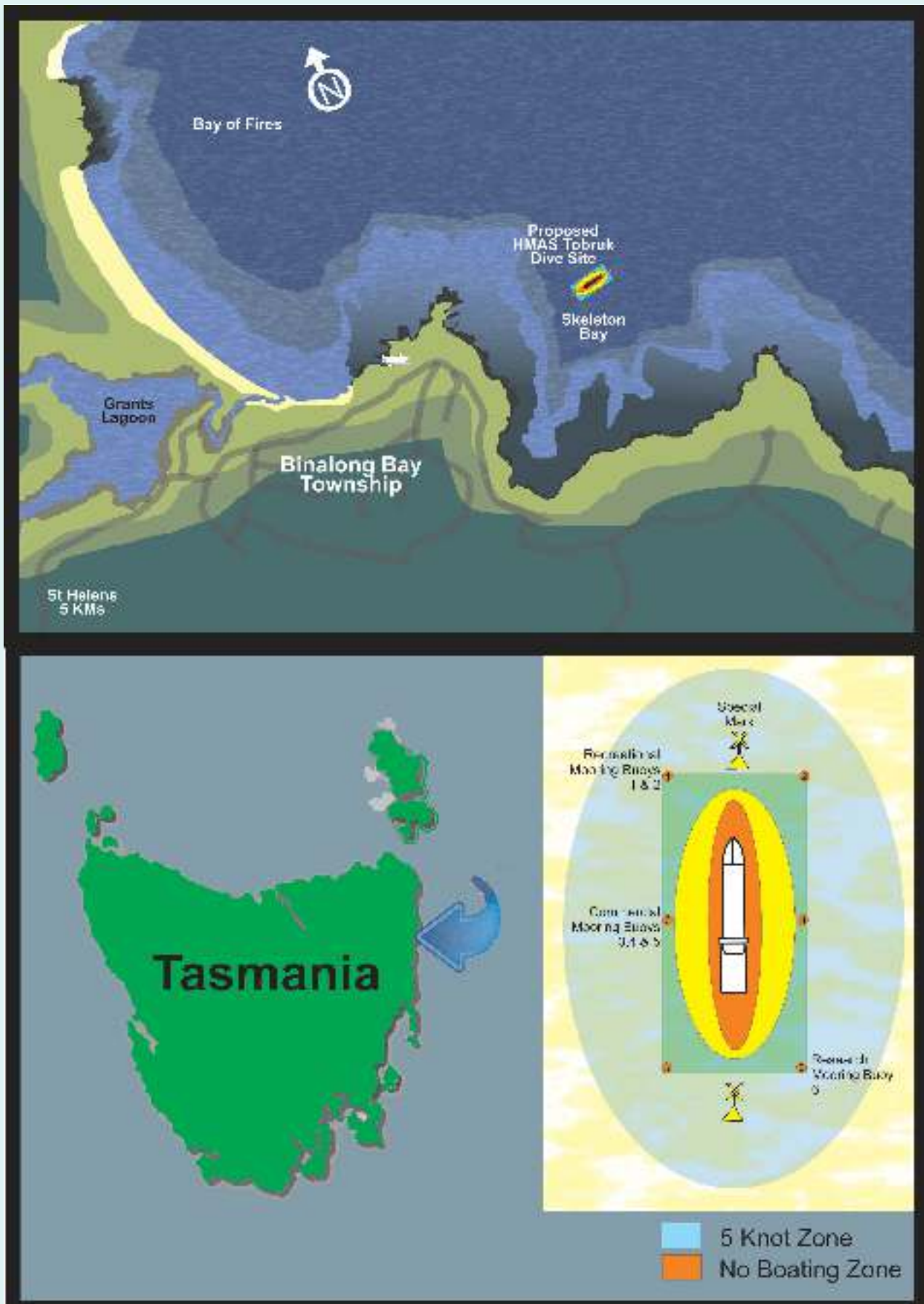
Marine life quickly populates artificial reefs, and within a short time the ex-HMAS Tobruk will be cloaked in a colourful blanket of marine life, aquatic plants and myriad species of fish, that will gather to feed, seek shelter and breed in this new protected habitat.

Divers will have exceptional opportunities to encounter and photograph abundant and unique species on the ex-HMAS Tobruk that are endemic to Tasmanian waters.

The ex-HMAS Tobruk will offer a wide range of dive options to suit all experience levels—from beginners to advanced divers. In addition, divers will enjoy a range of easily accessed follow-up dives, including shore-based and boat dives of Skeleton Bay’s white sand gutters, kelp-covered reefs and the beautiful, shallow gulches that fringe the shoreline of Binalong Bay, which are also ideal for snorkelling.

Dive Site Location

The ex-HMAS Tobruk will be located approximately 800 metres offshore from the holiday village of Binalong Bay. The vessel will sit upright on the white sand seafloor of Skeleton Bay, with between eight and ten 10 metres of water above.





Skeleton Bay, Tasmania. Photo by Liz Tasker.

The ex-HMAS Tobruk will not be visible above the water, and the dive site will be enclosed by a series of six unobtrusive buoys, located approximately 800 m from shore, to delineate the dive reserve.

Access

The shoreline at Skeleton Bay lies within the southern section of the Bay of Fires Conservation Area, which extends from Binalong Bay to Eddystone Point. The area is easily accessed by car on sealed roads, and a car park is located behind Skeleton Beach. The Skeleton Point picnic area, which is located on the Binalong Bay foreshore, approximately 220 m west of the beach, offers beautiful views across the Bay and opportunities for short coastal walks ranging from five minutes to just over an hour return.

Why Skeleton Bay?

Choosing Skeleton Bay as the ideal site for the ex-HMAS Tobruk was based on a range of core selection criteria:

- **Close proximity to existing infrastructure and services.** The Binalong Bay/St Helens region has the existing capacity to service the full range of diver and visitor needs, including an airport, hospital, ambulance (including the Royal Flying Doctor Service) and medical support services; visitor services including accommodation, restaurants and access to other high quality attractions; and essential services including banking, fuel and groceries—all located within 15 kilometres of the dive site.
- **Accessibility/diver and navigational safety.** The dive site will be easily accessed from the Binalong Bay boat ramp, located within one kilometre of the site.
- **The physical characteristics of the sea floor.** A Baseline Environmental Assessment prepared by Marine Solutions Tasmania Pty Ltd has shown that Skeleton Bay is suitable as a dive site for the ex-HMAS Tobruk, based on water depth, sand characteristics, the absence of reef structures close to the site, hydrodynamics and a range of other environmental considerations.
- **Proximity to key local attractions.** The siting of the ex-HMAS Tobruk at Skeleton Bay will maximise the economic benefit to the region's tourism industry, by linking with key nearby attractions, in particular the world-renowned Bay of Fires Conservation Area.

The **Investment Analysis and Business Case** prepared by Dr R.R. Noakes concluded that the proposed location at Skeleton Bay is the most appropriate location for the development of a new artificial reef, based on the following considerations:

- open access (to the site), bordering the Bay of Fires and St Helens
- sufficient depth of water, with no current or future maintenance dredging required (silting up will not be an issue in the future)
- able to be easily accessed/egressed by small vessels, with clear signage and buoys to accommodate a range of visiting crafts

- strategically located for access by police/emergency rescue water craft
- dive-related craft will not interfere with the use of St Helens public wharf
- ideally located for immediate access by water tours, bus and private vehicle drop-offs/pick-ups of passengers (commuters and visitors), and in close proximity to St Helens' shops and accommodation.
- Traffic to the dive site will be from the St Helens township and St Helens Point, at the mouth of the bay. Most traffic will be from the Binalong Bay township.

The **Baseline Environmental Assessment** prepared by Marine Solutions Tasmania Pty Ltd also confirms the suitability of the site. The report conclusion states:

'The results of our surveys indicate that Skeleton Bay contains an environmentally suitable area for the scuttling of a vessel the dimensions of the ex-HMAS Tobruk. This is on the basis of:

- *Suitable water depth to avoid shipping navigation impediments, but not so deep as to preclude recreational scuba diving*
- *Sufficient sand depth on the seabed to support the resting vessel*
- *Minimal foreseen detrimental impacts on existing natural values.'*¹⁶

THE DIVE CENTRE AND EX-HMAS TOBRUK MUSEUM

The ex-HMAS Tobruk Dive Experience will be developed as a unique, multi-layered interpretive experience for all visitors.

The compelling dive experiences offered on the ex-HMAS Tobruk in Skeleton Bay will be enhanced and supported by the development and construction of a new, purpose-built dive centre in St Helens. The centre will comprehensively service the needs of the dive tourism market and will also include an interpretive museum, which will honour the history and significance of the ex-HMAS Tobruk as an Australian naval vessel.

The museum, with intended links to the Australian War Memorial in Canberra, will tell the story of the ex-HMAS Tobruk over her 35-year career of service. The vessel's colourful life will be celebrated and shared with divers and non-diving visitors—from her commissioning in 1981 to her new incarnation in 2016 and beyond as a world-class dive tourism destination and artificial reef that supports abundant marine life and creates vibrant economic and social opportunities for the Tasmanian community.

Information, imagery and artefacts from the vessel will be included in interactive, multi-media displays.

It is estimated that up to half of all visitors who come to the region specifically for the ex-HMAS Tobruk will do so in order to visit the museum, making the dive centre a viable, year-round operation.

¹⁶ A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Pty Ltd, July 2014, p. 56



Ex-HMAS Tobruk beach landing. Source: Department of Defence. © Commonwealth of Australia.

DEMAND FOR THE EX-HMAS TOBRUK DIVE EXPERIENCE

According to the latest Tasmanian Visitor Survey (TVS), an estimated 3941 visitors to Tasmania participated in diving activities (excluding snorkeling) between July 2014 and June 2015, representing an extraordinary percentage growth of 65.3% from the previous year.¹⁷

TABLE 7: SCUBA DIVING PARTICIPATION IN TASMANIA

ACTIVITY	JULY 2011- JUNE 2012	JULY 2012- JUNE 2013	JULY 2013- JUNE 2014	JULY 2014- JUNE 2015	GROWTH %
Scuba diving (includes snorkeling until June 2013)	4370	6169	2385*	3941	+65.3%

<http://www.tvsanalyser.com.au/>

*It is important to note that, up until June 2013, The Tasmanian Visitor Survey included snorkeling in the range of diving activities surveyed. Figures up to June 2013 represent visitors who engaged in diving and snorkeling activities; figures post-June 2013 represent visitors who engaged in diving activities only and does not account for visitors who engaged in snorkeling activities. The significant drop between the 2012-2013 period and 2013-2014 period is therefore attributed to the removal of this question from the survey, rather than a decline in demand for diving activities in Tasmania.

The HMAS Tobruk Agreed Upon Procedures, prepared for Dr R.R Noakes' Investment Analysis and Business Case by accountancy firm Crowe Horwath, notes that:

*'The Tasmanian Visitor Survey for the twelve months ended March 2014 showed a 41% decrease in interstate visitors participating in "scuba" compared to the number participating in "scuba and snorkeling" in the preceding year. This data is discounted on the basis that it is a single year movement, the exclusion of "snorkeling" distorts the trend and there needs to be scuba experiences (such as the Tobruk) to draw divers to Tasmania.'*¹⁸

The highly significant increase in the 2014-2015 period for visitors engaging in diving activities is therefore even more encouraging, and demonstrates that scuba diving is a growth sector for adventure tourism to Tasmania.

Demand Forecasts

The Investment Analysis and Business Case also included demand forecasts for the project, based on:

- a survey of divers and dive business representatives
- a review of research completed for the ex-HMAS Adelaide at Terrigal, NSW, and the ex-HMAS Brisbane at Maroochydore, QLD.

The forecast annual dive demand (in terms of dive visits) for the ex-HMAS Tobruk at Skeleton Bay is **5,000 dive visits in the second year after placement of the vessel, 6,000 in the third year and 7,000 in the fourth year of operation.**¹⁹

The TVS figures for the year ended June 2015 show that 3,941 visitors to Tasmania engaged in diving activities during their stay. Additionally, within Tasmania, there are an estimated 1500 active scuba divers living within Tasmania. Ongoing diver demand for the ex-HMAS Tobruk is expected to come from a combination of local Tasmanian divers, repeat visits by divers who have previously dived in Tasmania, and divers from interstate and international markets who have not previously dived in Tasmania.

Therefore the forward estimates, once existing demand is factored in, are very conservative.

¹⁷ Tasmanian Visitor Survey July 2000-June 2015; Visitor Activities, Table 1: Total Visitor Activities, <http://www.tvsanalyser.com.au/>

¹⁸ Agreed Upon Procedures, HMAS Tobruk, Crowe Horwath, 31st July 2015, p5

¹⁹ Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p. 10



Target Market

The majority of visitors to Tasmania originate from Victoria, and the market is growing year by year. According to the TVS, 422,200 Victorians visited Tasmania between July 2014 and June 2015, representing an increase of 7.2% from the previous year.²⁰

Divers originating from Victoria are Tasmania's prime market for scuba diving. These are divers who:

- are used to diving in cool water environments
- already own or have access to the appropriate equipment for cool water diving
- are attracted to Tasmanian diving opportunities because of the ease of access, unique environments and opportunity to dive in uncrowded, untouched marine environments
- are drawn by the opportunity to experience high visibility, clear water diving.

The ease of access to the ex-HMAS Tobruk Dive Experience will be a key factor in the appeal for Victorian divers. Launceston is a quick one-hour flight from Melbourne, and St Helens is a comfortable two-hour drive from the airport. Visitors can also bring their own vehicle and sail from Melbourne on board the Spirit of Tasmania, which would enable them to dive on the ex-HMAS Tobruk on the day of travel, rather than waiting the recommended 12-18 hours between flying and diving.

In addition, opportunities also exist for the self-fly market from Melbourne. A direct flight from Moorabbin airport to St Helens airport is approximately 460 km—less than two hours' flying time in a twin-engine light aircraft.

²⁰ Tasmanian Visitor Survey July 2000-June 2015; Total Visitors to Tasmania, Table 1: Origin of Interstate Visitors, <http://www.tvsanalyser.com.au/>

ANTICIPATED BENEFITS

Locating the ex-HMAS Tobruk at Skeleton Bay will create far-reaching economic, environmental, community and tourism benefits for Binalong Bay, St Helens and the whole Break O'Day municipality as well as the broader East Coast region, and indeed, the state. Unlike other proposed Australian locations for the ex-HMAS Tobruk, the project will also bring wide-ranging, flow-on benefits to the whole state of Tasmania, through increased tourism visitation and spend, and increased employment opportunities for Tasmanians across the ex-HMAS Tobruk's life.

From decommissioning and scuttling through to the vessel's long life as an internationally known artificial reef and scuba diving location, the ex-HMAS Tobruk Dive Experience offers a viable long-term proposition that will bring far-reaching benefits to the East Coast region and the state of Tasmania.

Economic Benefits

As previously stated, the Break O'Day municipality has the highest unemployment and oldest demographic of any municipality in the state. Case studies of other ex-HMAS vessels, and the comprehensive Investment Analysis and Business Case for the ex-HMAS Tobruk project prepared by Dr. R. R. Noakes, predict that creating a world-class diving experience at Skeleton Bay will result in increased visitation to the region, increased spend in the local economy, jobs growth and other additional benefits.

Economic Impact

The Investment Analysis and Business Case assessed the likely economic impact of the ex-HMAS Tobruk on the local economy.

Based on a detailed survey questionnaire completed by approximately 200 divers and dive business representatives in Tasmania and across all Australian states, a series of responses were obtained in relation to typical dive expenses and likely levels of future visits to the St Helens site. The survey showed that diver interest was highly positive, highlighting the potential interest in this new form of dive activity, particularly for divers interested in ex-naval vessels across Australia and worldwide.

Average expenditure patterns were reported, in terms of food, accommodation, travel, and equipment hire. Length of stay details for their last dive experience was also recorded.

Based on the survey responses and drawing on dive industry representative experience in St Helens, a minimum annual gross expenditure estimate for the first three years of dive experience at the proposed new dive site was estimated. These conservative figures were based on the predicted annual dive demand of 5,000 visits* in the second year following placement of the vessel, 6,000 in the third year and 7,000 in the fourth year.

(*It is important to differentiate between 'visits' and 'visitors'. Visits are much more easily achieved than discrete visitors, and a single visitor may visit a location or attraction multiple times during their stay. For example, a diver from Hobart may well visit the ex-HMAS Tobruk many times in a year, and a visitor from interstate may also visit more than once during the course of their stay in the state).





The report summarises forecast **annual gross expenditure on dive-related activities** for the ex-HMAS Tobruk artificial reef at:

- over **\$2 million** in the second year following placement of the craft
- over **\$3.6 million** in the third year
- over **\$4 million** by the fourth year.²¹

The report also provided a more comprehensive 20-year estimation of the likely economic impact of visits by divers with their families and by day visitors at the local, regional and state level.

The total forecast annual impact is expected, conservatively, to range from **\$3.74 million** after the first year of operations to \$7.29 million in 2035.²²

These estimates do not include all likely day visitor expenditures in the St Helens town centre and at the dive centre, nor do they reflect all airline and ground transport incomes.

The forecast economic impact estimates are broadly in line with the individual dive site demand estimates and economic impacts associated with naval vessels in other parts of Australia (see *Table 1: Comparable demand and benefits of ex-HMAS vessel reefs*).

Employment

The ex-HMAS Tobruk Dive Experience, including the dive centre and museum, will result in significant job creation, through direct and downstream employment, for the Tasmanian community. The Investment Analysis and Business Case has found that:

- During the first year, **16 new full-time and part time jobs** will be directly created by the project.
- In years two to five of the operation, between **six and eight additional jobs per year** are expected to be generated in tourism-related services.²³

These estimates do not include additional employment benefits arising from new future accommodation investment.

A range of indirect economic and employment opportunities can be reasonably expected to arise from the project. Existing businesses will have opportunities to broaden their service and create additional employment as a result of increased visitor numbers. Additionally, global examples show that a range of service industries are typically established in the wake of attractions similar to the ex-HMAS Tobruk, such as air refill stations, guides, equipment sales and repair and gear rental outlets.

21 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p 9-10, p. 14

22 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p. 10

23 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p. 7



Project Viability And Longevity

The investment analysis provides a detailed view of all costs and benefits/revenues estimated for the project over a 20-year period, and concluded that:

'The economic viability of the overall project is estimated to be robust and highly viable...'

and that

*'No significant areas of project risk have been identified (technical, economic, social or environmental).'*²⁴

Because of their very nature, ex-naval vessel artificial reefs improve with age. The longer the ex-HMAS Tobruk is in the water, the more marine life it will attract and protect. As such, its value as an artificial reef and major dive attraction can only increase over time.

Tourism Benefits

Locating the ex-HMAS Tobruk at Skeleton Bay will create a major tourism attraction that will complement the existing brand and visitor experiences of the East Coast region.

The ex-HMAS Tobruk will offer Tasmania's target markets a unique visitor experience, which will include:

- a world-class cool water dive experience with a compelling point of difference that combines a naval vessel that is unique in Australia, and diverse underwater life that is unique in the world
- a globally-renowned coastal destination, located within the world-famous Bay of Fires Conservation Area
- a complete interpretive experience that tells the story of the ex-HMAS Tobruk, combining the diving experience with the ex-HMAS Tobruk dive centre and museum
- a range of high quality accommodation, dining and activity options in St Helens and the East Coast region, including opportunities to sample the region's renowned fresh local seafood, food and wine
- close access to some of Tasmania's best tourist destinations along the Great Eastern Drive, including the Bay of Fires, Freycinet National Park and Maria Island National Park
- opportunities for visitors to extend their journey and explore additional dive sites along the Tasmanian Dive Trail.

Locating the ex-HMAS Tobruk as a premier dive tourism experience at Skeleton Bay will bring a range of significant benefits for the region and local tourism industry. It will:

- create a new, major tourist attraction for the East Coast region of Tasmania
- increase visitor numbers and visitor spend in the region, particularly during the shoulder and low seasons

²⁴ Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, pp. 10-11



- attract a low volume, high-value market to the region (the dive market has high spend for relatively low numbers of visitors)
- encourage valuable overnight visitation to the region (because of the need for divers to allow adequate time between flying and diving) during the key shoulder/low tourist season
- increase employment opportunities within the local tourism and visitor service industries
- establish an international profile for Tasmania as a world-class dive tourism destination
- reinvigorate the profile of the existing, high-quality additional diving experiences along the east coast's Tasmanian Dive Trail
- create opportunities to link the ex-HMAS Tobruk Dive Experience with the Tasmanian Dive Trail, Great Eastern Drive and other key visitor experiences on the east coast
- align with the East Coast region's strong and continually growing reputation as one of the world's best adventure tourism destinations
- complement a number of planned projects for the St Helens area, including the redevelopment of St Helens airport (which, when complete will be the key access gateway to the east coast by air), new hotel development in St Helens and the completion of Stage Two of the Blue Derby Mountain Bike Trails.

Environmental Benefits

The Baseline Environmental Assessment completed by Marine Solutions Tasmania concluded that:

'...no major potential ecological contraventions resulting from the scuttling of the ex-HMAS Tobruk at the proposed site in Skeleton Bay have been identified. When compared to other sites around Australia, and globally, it provides many positive characteristics for a quality dive experience, including:

- *spectacular topside scenery*
- *a short boat ride, limiting seasickness and allowing multiple trips per day*
- *good water visibility*
- *low current velocities*
- *protection from the prevailing westerly winds.*

*Should this project proceed to the next stage, we have every confidence that the natural values of Binalong Bay, Skeleton Bay and the Bay of Fires Conservation Area would not be compromised by the scuttling of the ex-HMAS Tobruk at the proposed location.'*²⁵

²⁵ A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Pty Ltd, July 2014, p.57

The assessment also stated that:

*'The scuttling of the ex-HMAS Tobruk and its establishment as a dive site is not expected to have any detrimental impact on any Matters of National Environmental Significance (MNES)...including world heritage properties, national heritage places, wetlands of international importance, listed threatened species and communities, migratory species and Commonwealth marine species.'*²⁶

Artificial reefs, such as the ex-HMAS Tobruk, support an incredible range and mass of marine life. They provide a protected habitat in which varied species thrive—plant and fixed marine animals quickly inhabit the structure and a range of free swimming fish species are attracted to the site for shelter and feeding opportunities. Artificial reefs also create unique opportunities for observation and study of marine species and are keenly supported by scientific and recreational communities. The opportunities presented by artificial reefs to easily observe, study and understand our marine life and environments can result in critical information and knowledge that can assist in supporting effective marine management into the future. In addition, the presence of artificial reefs removes pressure on natural reefs and other dive sites as more diving activity is diverted towards the artificial reef.

Fishing

This part of the coast is much loved by fishing enthusiasts, and the east coast in general—and St Helens area in particular—are promoted as prime fishing destinations.

Skeleton Bay is a fishing spot that is favoured by locals and visitors, and it is anticipated that the placement of the ex-HMAS Tobruk will not create any negative impact on recreational fishing in the local area.

26 A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Pty Ltd, July 2014, p. 8



A small proposed protected area will be created around the ex-HMAS Tobruk to ensure the safety of divers and to protect the vessel and enable habitat to develop and establish at the site. This is not expected to have any adverse effect on traditional fishing opportunities in Skeleton Bay, nor will it impact on other existing reefs that are already favoured by local recreational fishing enthusiasts. Additionally, the new reef will not draw fish away from existing reefs, as most fish are territorial and unlikely to migrate away from their established habitat. In fact, it is more likely that new species, such as kingfish, will be drawn to the new reef, which will attract larger numbers of fish to the bay. Rather than having a negative impact on local fishing, the ex-HMAS Tobruk is more likely to improve opportunities for fishing, as local fish populations thrive and grow with the addition of new habitat and food sources.

The ex-HMAS Tobruk will provide an opportunity for Tasmania to create sustainable, marine-based visitor experiences with the potential to enhance and protect the natural values of the Binalong Bay and Skeleton Bay area.

Community Benefits

The project will bring a range of key additional benefits to the local and broader east coast and Tasmanian communities, including:

- an overall increase in the volume and level of expenditures of day visitors, who will stop in St Helens to visit the dive centre/museum and enquire about the ex-HMAS Tobruk
- increased use of existing accommodation in the St Helens area
- increased employment associated with boat trips to/from the dive site and the selling/rental/servicing of dive equipment
- increased future investment in low-cost accommodation to specifically suit the needs of divers/dive parties.²⁷

Dr Vicki Schaffer's PhD study of the impact of the ex-HMAS Brisbane on the local community indicated that the vessel's presence had made a positive social contribution, as a catalyst for the creation of a collaborative network of local businesses, government departments and community organisations.²⁸ Local businesses in the St Helens and Binalong Bay area and wider East Coast region can expect a similar benefit, as they collaborate and share information in the promotion and management of the ex-HMAS Tobruk, and in the activities and investment the attraction will generate in the community.

Local Connections

There is already a sense of community connection and ownership of the ex-HMAS Tobruk within the East Coast region and in Tasmania. The ship last visited Tasmania in February 2014 as the flagship for the Royal Hobart Regatta, when she welcomed locals onboard during the weekend of celebrations.

27 A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Pty Ltd, July 2014, p. 11.

28 Valuing artificial reefs; the case of the ex-HMAS Brisbane Conservation Park, Dr Vikki Schaffer, BBus (Hons) USC, March 2011, pp. 161-162

Ex-HMAS Tobruk in Hobart. Source: Department of Defence. © Commonwealth of Australia.



St Helens and Binalong Bay locals are already referring to the ex-HMAS Tobruk as 'our boat', and there are direct connections linking the ship to the local community. Local residents have served as crew on the ex-HMAS Tobruk—most significantly, former St Helens resident Darren Watkins, who was the last naval officer to have command of the vessel when he put the ex-HMAS Tobruk up against the wharf when it docked for the final time in Sydney, and whose family are still part of the St Helens community.

Tasmanian soldiers were among the brave men known as the Rats of Tobruk, and this year, two bronze plaques were placed at the Siege of Tobruk monument in New Town, southern Tasmania, in honour of the 15 Tasmanian and 133 Polish soldiers who died during the Siege of Tobruk in 1941.

Community Consultation And Support

There is significant support for the project within the local community. Over the last three years, community consultation has been undertaken to inform local residents, businesses and stakeholders, gauge support and create connections in the effort to bring the ex-HMAS Tobruk to Skeleton Bay. Community consultation has included information sessions held in St Helens and an information caravan located at Binalong Bay, at which residents and locals have had the opportunity to ask questions and receive information about the project.

Letters of support for the project have also been received from:

- The Hon Tony Abbott MP, former Prime Minister of Australia
- The Hon Will Hodgman, MP, Premier of Tasmania
- The Hon Stephen Parry, President of the Senate, Parliament of Australia
- The Hon Darren Chester, Parliamentary Secretary to the Minister for Defence
- The Hon Eric Abetz, Liberal Senator for Tasmania
- The Hon Rene Hidding MP, Minister for Infrastructure
- The Hon Eric Hutchinson, MP, Federal Member for Lyons, Parliament of Australia
- The Hon Guy Barnett MP, Parliamentary Secretary to the Premier of Tasmania, Liberal Member for Lyons
- Rebecca White, MP, Labour Member for Lyons, Tasmania
- David Reed, Chairman, East Coast Regional Tourism Organisation, Tasmania
- Julian Harrington, Chief Executive, The Tasmanian Seafood Industry Council
- John Brown, General Manager and Mick Tucker, Mayor—Break O'Day Council

To view letters of support, please email:

manager@smallbusiness.org.au OR admin@bodc.tas.gov.au



The Tasmanian diving community is also extremely supportive of the project, as evidenced by the following from respected Tasmanian diver and underwater photographer, Jon Bryan:

'Deliberately sunk ex-navy vessels make popular dive sites around the world. I have dived on a few, especially in Canada where the worldwide trend to use these vessels as artificial reefs and dive attractions really started in the 1990s.

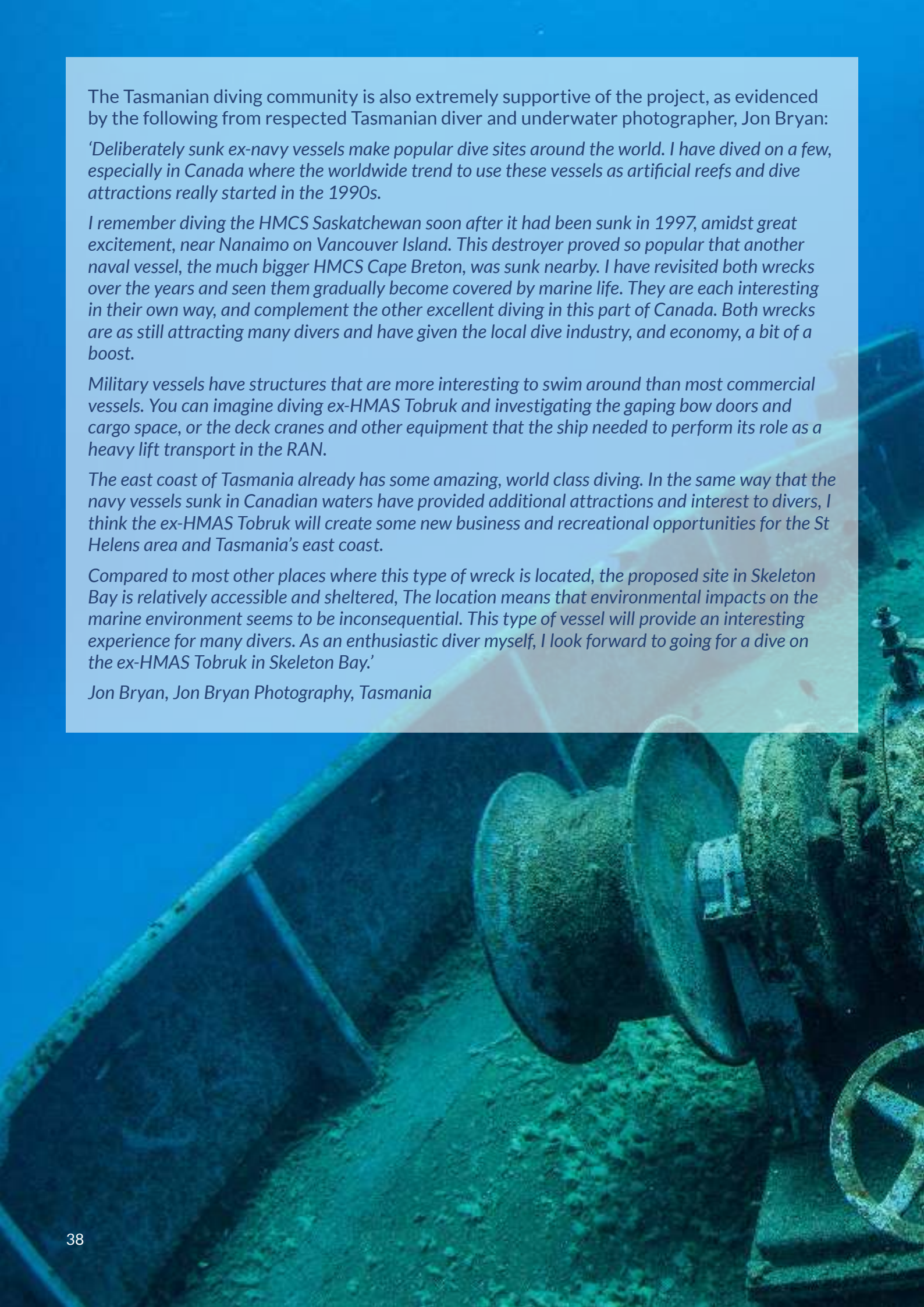
I remember diving the HMCS Saskatchewan soon after it had been sunk in 1997, amidst great excitement, near Nanaimo on Vancouver Island. This destroyer proved so popular that another naval vessel, the much bigger HMCS Cape Breton, was sunk nearby. I have revisited both wrecks over the years and seen them gradually become covered by marine life. They are each interesting in their own way, and complement the other excellent diving in this part of Canada. Both wrecks are as still attracting many divers and have given the local dive industry, and economy, a bit of a boost.

Military vessels have structures that are more interesting to swim around than most commercial vessels. You can imagine diving ex-HMAS Tobruk and investigating the gaping bow doors and cargo space, or the deck cranes and other equipment that the ship needed to perform its role as a heavy lift transport in the RAN.

The east coast of Tasmania already has some amazing, world class diving. In the same way that the navy vessels sunk in Canadian waters have provided additional attractions and interest to divers, I think the ex-HMAS Tobruk will create some new business and recreational opportunities for the St Helens area and Tasmania's east coast.

Compared to most other places where this type of wreck is located, the proposed site in Skeleton Bay is relatively accessible and sheltered, The location means that environmental impacts on the marine environment seems to be inconsequential. This type of vessel will provide an interesting experience for many divers. As an enthusiastic diver myself, I look forward to going for a dive on the ex-HMAS Tobruk in Skeleton Bay.'

Jon Bryan, Jon Bryan Photography, Tasmania



ANTICIPATED COSTS

The Investment Analysis and Business Case for the ex-HMAS Tobruk artificial reef prepared by Dr R.R Noakes, identified the following project costs:

Development Costs

The total cost for the overall project has been estimated at **\$9.13 million**. This is exclusive of GST (10%) and includes a 10% contingency (price and physical quantities).

For the two major project components—the vessel and the dive centre—the separate total economic costs were as follows:

- Decommissioning, cleaning, transfer and placement of ex-HMAS Tobruk and provision of buoys and signage at the dive site: **\$8.380 million (with contingency)**.
- Construction and fit-out of a dive centre building in St Helens' town centre: **\$750,000**.

Operating And Maintenance Costs And Periodic Replacement Costs

Annual maintenance costs for buoys and signage at the dive site are not expected to be significant (\$15,600 p.a.). Given its public sector nature, annual safety inspections will be required. An annual escalation factor of 3% is assumed.

Costs associated with the dive centre and museum are predominately for the support of the operational arm of the attraction (the ex-HMAS Tobruk Trust). In addition, an amount has been set aside in the budget for consumables (power, etc.). As the ex-HMAS Tobruk dive centre and museum will be leased soon after establishment, it is assumed that most of the ongoing costs of the centre will be the responsibility of the lessee.

In the interim, an amount has been allowed for establishment of the centre and the first year's costs have been accounted. This does not include staffing, as the volunteer group will undertake this establishment phase.

Annualised figures have been included here so that they are provided in the event that a lessee is not forthcoming. These amounts have also been provided for in the business case.

TABLE 8: SUMMARY OF DEVELOPMENT COSTS

Ex-HMAS vessel preparation/transfer/placement and dive centre development in St Helens (including operating costs)

EX HMAS TOBRUK	COST ITEM	COST
	Acquisition transfer	\$5.8 M
	Preparation	\$1.6 M
	Placement	\$700,000
	Buoys/cables	\$55,000
	Signage	\$20,000
	Environmental monitoring	\$120,000
	Launch marketing	\$85,000
SUBTOTAL		\$8.38 M

DIVE CENTRE AND MUSEUM (ST HELENS)	COST ITEM	COST
	Land (building site)	\$0
	Building construction and fit out	\$725,000
	Museum display preparations	\$25,000
SUBTOTAL		\$750,000

SUMMARY OF DIVE CENTRE ANNUAL OPERATING COSTS	COST ITEM	COST
	Electricity	\$6,000
	Consumables	\$2,000
	Insurance	\$5,000
	Cleaning	\$2,500
	Accounting	\$5,000
SUBTOTAL		\$19,500

Decommissioning And Scuttling

Prior to scuttling, the vessel will undergo a mandatory decommissioning and cleaning process. Undertaking these activities in Tasmania would create a financial benefit for the Federal Government, and an additional economic benefit for Tasmania.

Suitable facilities for this purpose are available at Bell Bay in northern Tasmania, and at Devonport, in the state’s north-west, and there are a range of Tasmanian businesses with the capability of delivering the required work. Wharfage fees in Tasmania are significantly cheaper than Sydney, where the ex-HMAS Tobruk currently resides. Based on current TasPorts costs for northern Tasmanian ports of \$1.55 per metre per day, the cost of keeping the ex-HMAS Tobruk at Bell Bay or Port Dalrymple would be approximately \$196.85 per day, plus some minor charges for power and water.

Locating the decommissioning phase of the project in northern or north-west Tasmania will stimulate the local economy by creating much-needed employment and growth opportunities for local businesses, and will generate far-reaching benefits for the Federal Government and wider Tasmanian economy.

While the decommissioning process will remove all fittings from the ex-HMAS Tobruk, the integrity of the vessel will remain. Significant fittings will be preserved in the ex-HMAS Tobruk museum at the proposed dive centre, to honour the ship and its story.

The scuttling of the ex-HMAS Tobruk at Skeleton Bay will be undertaken by a specialised crew of highly experienced demolition experts. The vessel will be rigged with explosives designed to allow the vessel to sink evenly and settle on the bottom upright.

The scuttling itself will attract worldwide interest and media coverage. This is a spectacular event to witness and thousands of spectators, along with international media, can be expected to visit the state for the occasion.



MANAGEMENT/ORGANISATIONAL STRUCTURE FOR THE EX-HMAS TOBRUK SITE

The Investment Analysis and Business Case for the ex-HMAS Tobruk outlines the proposed organisational structure and management for the project as follows:

*'(A Trust, with a wide range of stakeholders), will be responsible for the negotiations with the Commonwealth Government. The development and subsequent maintenance of the proposed support facilities at the site (buoys and signage) would be the responsibility of local government, given the range of public or common property benefits to be generated. Both components can be undertaken independently and concurrently. The operation of the dive centre will be undertaken by a Trust structure, to be determined based on best practice and modelled on successful trusts elsewhere in Tasmania and across Australia. The Trust will be responsible for the artificial reef after placement and for the dive centre.'*²⁹

The Investment Analysis and Business Case also included a financial analysis of the project's Trust Management:

- *'The financial costs and forecast revenues over the 20-year period indicate that the Trust will be a highly viable business entity.*
- *It has been subjected to very rigorous sensitivity testing.*
- *The Net Present Value (NPV) of net revenues, after annual costs, is estimated at \$2.82 million. The Benefit-Cost Ratio is expected to be 2.91.*
- *These results indicate that following the placement of the ex-HMAS Tobruk, the installation of all buoys, signage, etc. at the site and the development of a new dive centre for subsequent leasing for retail activities will be financially sustainable.*
- *The dive facility and the dive centre will not require any forward state government or local government financial support over the 20-year life of the proposed attraction.'*³⁰

Investigations of existing management structures for other ex-HMAS vessels revealed that different approaches occurred across each location. Based on this, an initial position has been established regarding the most appropriate management structure for the ex-HMAS Tobruk:

'In summary, the day-to-day management of the ex-HMAS Adelaide at Terrigal, through a well-structured Trust authority, would appear to be the most appropriate management structure for Australian naval (vessel dive sites). The Trust structure, if developed for ex-HMAS Tobruk for St Helens, should incorporate involvement of the Break O'Day Council (BODC), on a day-to-day basis, as well as part of the strategic ownership. It is important that community interests and ownership, over the long term, are represented by local government (in this case, BODC). Without BODC direct involvement in the Trust, local, long-term management cannot be justified and maintained.'

(See Appendix 3: Management structures and options for the ex-HMAS Tobruk at St Helens).

Further investigation and a final decision on the management approach for the ex-HMAS Tobruk at Skeleton Bay will occur following acceptance of this proposal by the Federal Government.

29 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, pp. 7-8

30 Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December 2015, p. 11



SUMMARY AND RECOMMENDATIONS

Locating the ex-HMAS Tobruk at Skeleton Bay will create a world-class tourist attraction and international dive tourism destination that will benefit the local community, East Coast region and whole state of Tasmania. It will reinvigorate the local economy, create ongoing employment opportunities, boost the local tourism industry and bring far-reaching benefits for the state. Additionally, it will celebrate and honour the story of the ex-HMAS Tobruk as one of Australia's significant naval vessels.

The community, region and state are well positioned to take up this opportunity and create a highly successful visitor experience that complements existing brand and marketing initiatives and fits perfectly with the East Coast's reputation as a premier adventure tourism destination.

All conclusions of the independent Investment Analysis and Business Case and Baseline Environmental Assessment support the proposal as economically and environmentally viable. The Investment Analysis and Business Case concluded that:

- *'The proposed development of a new artificial dive reef in St Helens, utilising the ex-HMAS Tobruk, is likely to be a **highly attractive public sector investment**. It will be a **major economic development incentive** for the local economy, in general, and for the town/waterfront precinct, in particular. As an historical naval dive experience, it will be unique to Tasmania's dive tourism sector.*
- *The dive centre is forecast to be **financially viable in its own right**. Financial revenues from dive permits and dive centre revenues will support all dive site operating and maintenance costs. **It will not require any future state or local government funding support**.*
- *There are major synergies to be captured for St Helens from the **joint collaboration of the St Helens Chamber of Commerce and state/local government**, in the development of the new dive attraction and the rehabilitation/expansion of its public wharf and recreational/commercial fishing activities, with improved bar way conditions, easier open sea access and direct air access via the St Helens airport.*
- *The proposed artificial reef project is identified to be **a most attractive economic investment and should be taken forward for implementation**. As a potential world-class tourism attraction, it represents one of St Helens' **most promising opportunities for economic recovery and growth of the northeast economy of Tasmania**.*



Ex-HMAS Tobruk. Source: Department of Defence. © Commonwealth of Australia.

SOURCES AND ACKNOWLEDGEMENTS

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- HMAS Tobruk (II)/Facebook https://www.facebook.com/HMASTobrukII/info/?tab=page_info
- Ex HMAS Brisbane (QLD) <http://www.nprsr.qld.gov.au/parks/ex-hmas-brisbane>
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APPENDICES

APPENDIX 1: Proposed ex-HMAS Tobruk Artificial Reef, Investment Analysis/Business Case, Dr R. R. Noakes, December, 2015

This report was prepared for the St Helens Chamber of Commerce and Break O'Day Business Enterprise Centre by Dr R.R. Noakes. It presents the results of a range of financial and economic analyses relating to the preparation of a business case for the relocation of the ex-HMAS Tobruk to Skeleton Bay Tasmania as an artificial reef and dive site.

Copies of this report can be obtained by emailing
manager@smallbusiness.org.au OR admin@bodc.tas.gov.au

APPENDIX 2: A Baseline Environmental Assessment at the site of the proposed scuttling of the HMAS Tobruk in Skeleton Bay, northeast Tasmania, Marine Solutions Tasmania Pty Ltd, July 2014

This report was prepared by Marine Solutions Tasmania Pty Ltd as an environmental feasibility study for the proposed scuttling of the ex-HMAS Tobruk in Skeleton Bay. The document details the methods and results of this study, including characterisation of habitat, localised hydrodynamics, biological community, sediments and water quality.

Copies of this report can be obtained by emailing
manager@smallbusiness.org.au OR admin@bodc.tas.gov.au

APPENDIX 3: Letters of support

To view the letters of support for this project, please email:
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