REIMAGINING OUR REGIONS

TASMANIA'S FAR NORTH WEST

The Doughboys, Cape Grim
© Kraig Carlstrom

Tasmanian Government

Contents

1. Reimagining our Regions

Reimagining our Regions is an initiative of the T21 2015–2020 Tasmanian Visitor Economy Strategy. Improving dispersal of visitors to regional communities and the need for bold innovation and new product development, especially in regional areas, was identified as a high priority at the mid-term review of the Strategy, undertaken in July 2017. These priorities reflect the view of the T21 government and industry partners that the benefits of Tasmania's successful visitor economy can be spread more evenly throughout the state. It also acknowledges that regional dispersal is a key measure of success of Tasmania's current and future visitor economy.

With this in mind, Reimagining our Regions was developed as a concept to generate new and creative tourism concepts; understand constraints and enablers to growth; and develop ideas to stimulate investment in tourism products in regions that have identified potential for growth. At the time of the release of this report, the Tasmanian tourism industry and the Tasmanian economy and community are facing unprecedented impacts from the COVID-19 emergency. It is unknown at this point in time what the future state will be post this crisis. Insights such as from Reimagining our Regions, will be valuable in recovery and rebuild.

The far north west of Tasmania was selected as the pilot region for Reimagining Our Regions due to slower growth compared to other regions in the state and its proximity to several demand generating projects in the pipeline, including: Cradle Mountain Gateway Precinct; new Spirits of Tasmania vessels; and Tasmanian Drive Journeys.

The primary objective of Reimagining our Regions is to generate ideas for tourism development opportunities – blue sky thinking about future possibilities - by a group of experienced tourism professionals, with proven demonstrated expertise and success in tourism ventures and marketing, casting a fresh set of eyes on the region. The field trip itinerary is included at Appendix 1.

The concepts and insights identified aim to increase first-time and repeat visitation to the target region; increase the average length of stay; increase visitor expenditure; increase visitor dispersal (geographically and seasonally); increase visitor satisfaction; and consequently, increase the contribution of tourism to the social and economic life of the region. Importantly, a key part of this process is identifying what may differentiate the far north west from other parts of Tasmania, Australia and the rest of the world.

The Reimagining our Regions far north west pilot project was designed in two stages as detailed below. Where the value proposition of ideas generated demonstrate merit, a business case could then be developed for public or private investment opportunities.

The insights identified by the field trip group have been reviewed and informed by a regional reference group, including:

Scott Riley, GM Circular Head Council
Shane Crawford, GM Waratah-Wynyard Council
Daryl Connelly, CEO Cradle Coast Authority
Clint Walker, Chair Circular Head Tourism Association
John Dabner, GM Tall Timbers
Cyndia Hilliger and Justin McErlain, Waterfront Wynyard
Nic Deka, RM Parks and Wildlife Service
Tom Wootton, CEO West by North West Tourism

FIELD TRIP	TOURISM OPPORTUNITY PLAN
— Immerse a group of tourism experts in the region — Generate new ideas for tourism experiences and identify potential barriers to growth — Identify enablers of growth and constraints of growth	— Synthesize field trip outcomes with relevant strategies, consumer insights and market intelligence — Identify shortlist based on criteria — Ground truth with local stakeholders — Identify 'enabler' concepts that offer maximum impact — Conduct preliminary market testing of priority projects

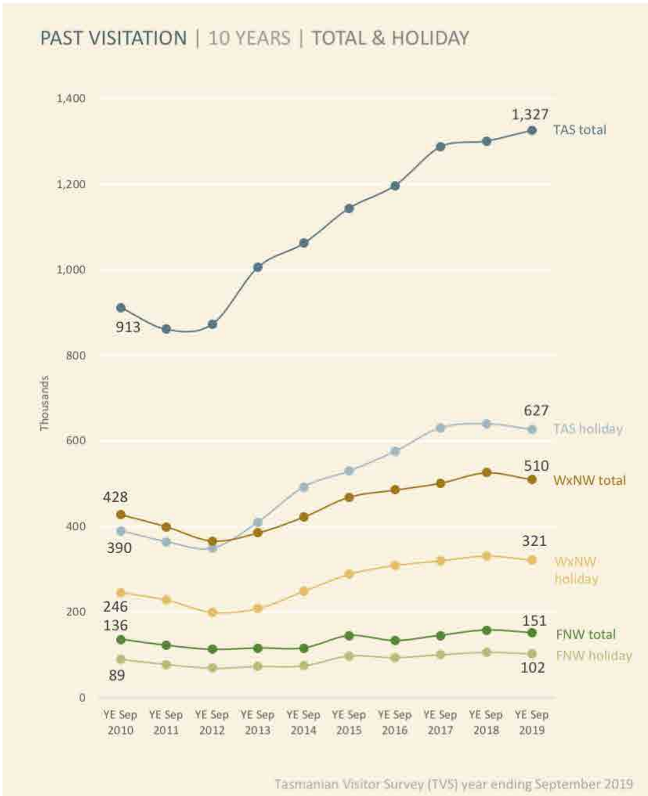
AERIAL OF STANLEY AND THE NUT
© JEWELS LYNCH

2. About the far north west region

The far north west region of Tasmania encompasses two local councils: Waratah- Wynyard and Circular Head. The far north west spans an area of 8,500km, just over 12 per cent of Tasmania's total land area. This area includes several reserves, including pinmatik / Rocky Cape National Park, Savage River National Park, the Arthur-Pieman Conservation Area, and more. The takayna / Tarkine temperate rainforest area occupies 447,000 hectares bounded by the Arthur River, the Murchison Highway, the Pieman River, and the Southern Ocean.

The West by North West tourism region (nine municipalities) has experienced a 19 per cent increase in visitors over the last ten years, compared to 45 per cent for the whole state. Over the same period, the far north west region has experienced an 11 per cent increase in visitors. In the context of lower overall growth in the past ten years, growth in visitation to the far north west has improved in the past five years, tracking closer to visitor growth for the whole state.

Visitors to Tasmania increased 25 per cent over the past five years, and visitation to the far north west increased 30 per cent; however, visitation to the far north west has dropped 4 per cent in year ending September 2019 compared to September 2018, in line with visitation to the broader West by North West region, down 3 per cent, while overall visitation to Tasmania has increased 2 percent.



The Tasmanian Visitor Survey (TVS) measures visitation to four towns in the far north west: Wynyard, Stanley, Smithton, and Arthur River. The four towns together welcomed 151,000 visitors, 11 per cent of all visitors to Tasmania in the year ending September 2019. The TVS also measures visitation to three attractions within this area: pinmatik/ Rocky Cape National Park (23,000 visitors in the year ending September 2019), the Tarkine region (45,000), and Corinna (27,000). Visitors to the far north west generally include the region as part of a longer trip around Tasmania, and almost half of all visitors to the far north west also visit Cradle Mountain during their trip.

2.1. VISITOR PROFILE

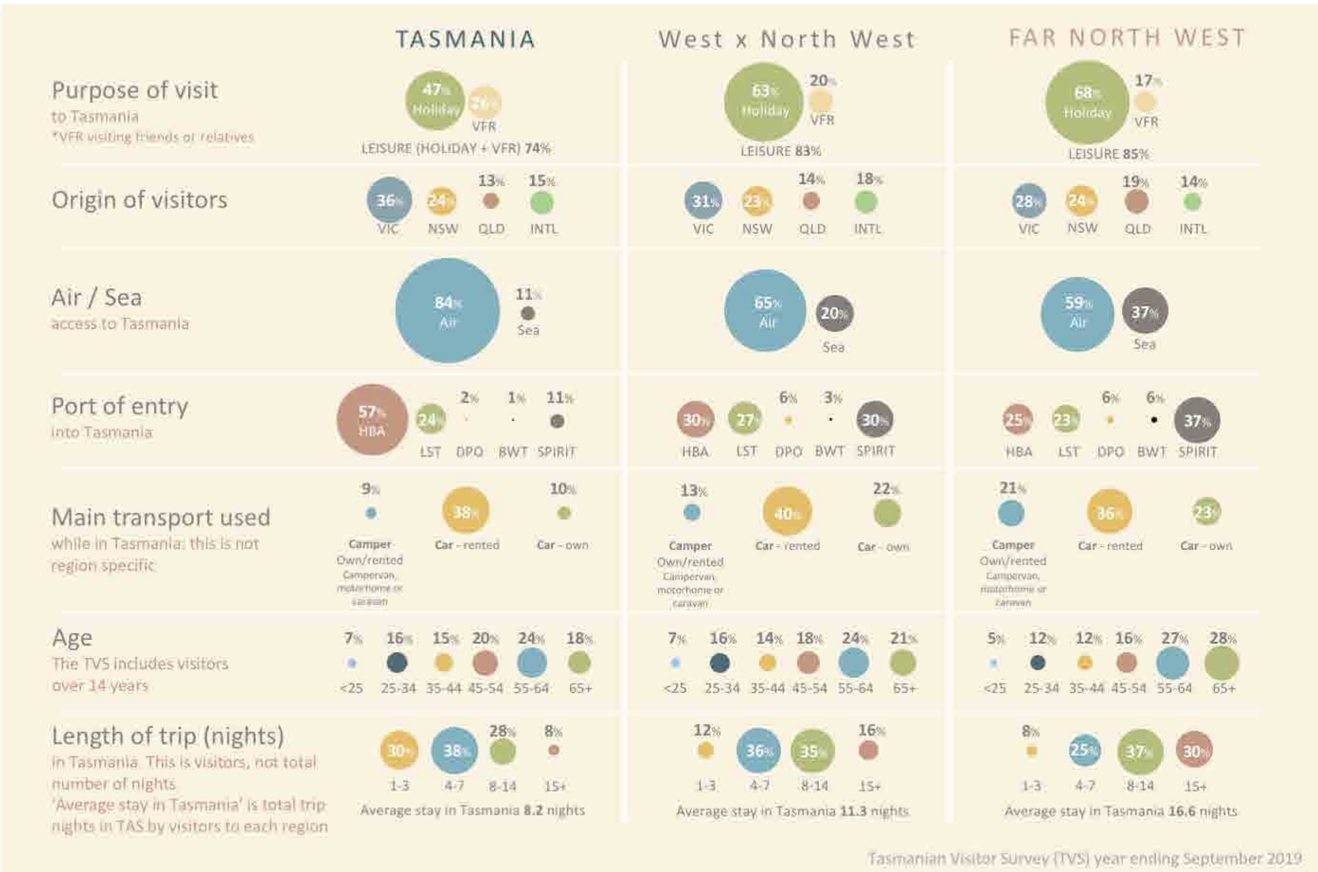
Visitors to the far north west are primarily travelling to Tasmania for leisure (85 per cent), with 68 per cent travelling for the purpose of a holiday, and 17 per cent for the purpose of visiting friends and relatives in the state. Visitors to the far north west are more likely to have arrived via the Spirits of Tasmania (37 per cent), or flown into one of the local airports, Devonport or Burnie-Wynyard (6 per cent) however a larger proportion fly first into Hobart (25 per cent) or Launceston airports (23 per cent).

Among visitors to the far north west, the chance to 'self-drive / tour around' was a strong influence behind their decision to visit Tasmania (60 per cent). While travelling in Tasmania, those who visit the far north west tend to self-drive (75 per cent), using their own, rented or a friends' car, campervan or motorbike.

Visitors to the far north west are generally including the region as part of a longer trip around Tasmania. Sixty-seven per cent of visitors to the region are staying more than 8 nights in Tasmania, while short-stays of 1-3 nights in Tasmania are associated with just 8 per cent of visitation in the far north west. Just under half (47 per cent) of all visitors to the far north west also visited Cradle Mountain during their trip to Tasmania. The average length of stay in the far north west is 2 nights. Stanley is the tourism hub of the sub-region, welcoming 65 per cent of visitors to the far north west, and 31 per cent of overnight stays.

The average age of visitors to the far north west is higher than the average age of all visitors to Tasmania: 55 per cent of visitors to the far north west are over 55, compared to 42 per cent for the state.

In order to identify new tourism concepts in the far north west and to test the validity of ideas and insights, it is essential to understand the major market and consumer trends and challenges influencing tourism in Tasmania.



3. Market and consumer trends

TRENDS IN NATURE BASED TOURISM

Adventure and nature-based tourism is forecast to become a $1.3T global tourism segment by 2023, according to the US based Adventure Travel Trade Association.[1]

Nature based tourism sectors gathering traction with audiences include:

- Glamping and luxury tented accommodation in unique and spectacular locations
- Repurposing of heritage, industrial and buildings and farm sheds
- Short walks and interpretive experiences
- Cycling, mountain biking in nature, and
- Wellness experiences that speak to the improvement of mind, body and spirit.

Nature-based and adventure travel represents a spectrum of experiences categorised by their perceived level of risk in participation. Adventure travellers are seeking experiences that deliver to an increasingly higher level of expectation. Beyond experiential, customers are now seeking transformative travel that offers deeper connection with land, community and improvement of the mind and delivers a greater sense of self and learning.

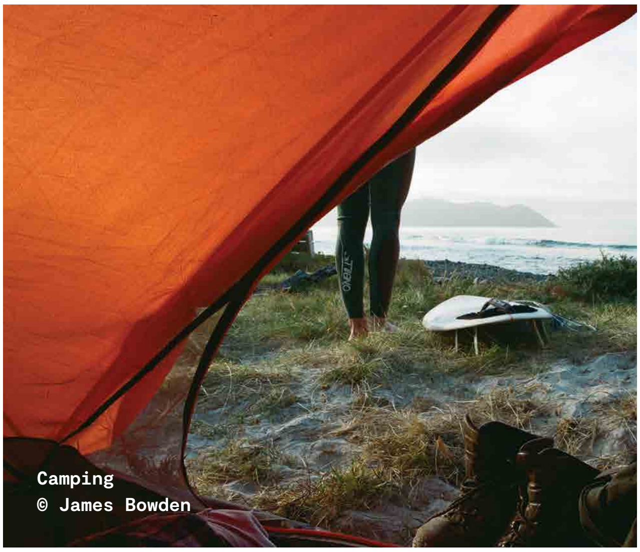
TRENDS IN CARAVAN AND CAMPING

According to the Caravan Industry Association of Australia at year ending 30 June 2019, domestic caravan and camping has grown at 7.8 per cent per annum and the industry is valued at $7.9B in visitor expenditure.[2] All customer segments have grown and for the first time, young/midlife couples with no children has over taken the family demographic as the largest sector of users, boding well for Tasmania and the core brand audiences.

Tasmania has seen good growth in domestic caravan and camping travellers with 6 per cent growth in nights. International caravan and camping visitors represents 15 per cent of the total market segment with international visitors growing by 3.4 per cent to year ending 30 June 2019. International visitors experienced a reduction of 5.5 per cent in visitor nights, indicating more visitors are staying shorter amounts of time. More detail on the caravan and camping segment performance for year ending 30 June 2019 can be found in Appendix 2.

TRENDS IN SIGNATURE EXPERIENCE AND "HERO" PRODUCT DEVELOPMENT:

Since 2013, Tourism Australia have developed a program to elevate unique product categories in Australia to "signature experience" category. The program seeks to connect with travellers seeking memorable experiences and encourages regions and private operators to develop key products to fit with aspirational customer expectations, elevating experience above destination reputation and creating a halo effect for the other operators around it.



Camping
© James Bowden

[1] 2019, Allied Market Research for Adventure Travel Trade Association: Adventure Tourism Market, Global Opportunity Analysis & Forecast, 2017-2023.

[2] Tourism Research Australia for Caravan Industry Association of Australia, year ending June 30th 2019 Caravan and Camping tourism segment review.

4. Tourism strategy context

Driving into the takayna / Tarkine
© Rob Burnett

The tourism policy and strategy environment for Tasmania positions visitor dispersal into regions as a key area of focus for government and industry. A range of demand and supply initiatives are geared to drive visitation to regions. Work has commenced on the development of the T21 2030 Visitor Economy Strategy and industry consultation for this work identifies the need to continue this focus to ensure that Tasmania has a depth of visitor experience and the tourism benefits are more evenly distributed across communities.

With a view to understanding future tourism demand growth in Tasmania over the next decade, Tourism Tasmania engaged Deloitte Access Economics to undertake forecasting of Tasmania tourism demand. A summary of the forecasting can be found at **www.t21.net.au.**

In light of the current far north west visitor profile being predominantly interstate visitation, forecasting of significance for this region indicates that the interstate holiday segment is expected to grow at a Compound Annual Growth Rate (CAGR) of 3.9 per cent per annum out to 2030. This is a more rapid growth rate for this segment than between 2008 to 2018, where the interstate holiday segment grew at 3.1 per cent CAGR.

The other visitor segment worthy of note in relation to the far north west is the 2030 forecast for the intrastate market, Tasmanians exploring Tasmania. The holiday segment of the intrastate segment is expected to grow at 3.6 per cent CAGR, maintaining the longer-term historical growth rate of 3.9 per cent CAGR.

The Deloitte Access Economics demand and supply forecasting was conducted prior to the COVID-19 public health emergency which has had unprecedented global impacts on tourism. At the point in time of release of this report the full impact on Tasmanian tourism demand is unknown. The Deloitte Access Economics model is an unconstrained econometric demand model based on changes to the underlying determinants of tourism demand. The econometric analysis takes into account macroeconomic factors in Tasmania and visitor source markets, including Gross State Product (GSP) or Gross Domestic Product (GDP), relative prices and inflation, population growth, changes in oil prices, and fluctuations in exchange rates.

5. Enablers to growth

The far north west is poised to benefit from a range of statewide tourism growth initiatives that have been planned. Five initiatives identified as potentially impacting positively on the far north west are:

- The new Spirit of Tasmania vessels that will provide a capacity expansion
- Drive Journeys investment and work progressing to position Tasmania in the consumer market as a leading touring destination in Australia
- Cradle Mountain Gateway redevelopment
- Technology and data
- New tourism consumer brand and customer segmentation.

5.1 SPIRITS OF TASMANIA CAPACITY EXPANSION

At the time of this report TT-Line was in negotiations with the ship builder with targeted delivery dates of late 2022 for hull one and late 2023 for hull two. The new ships will accommodate around 1,800 passengers and 600 vehicles, compared to current published capacity of 1,400 passengers and 500 vehicles. This will have an immediate impact on the region's visitation. Preparedness to cater for these visitors in accommodation, food and beverage and things to do is a key strategic imperative for the region.

The new vessels provide additional opportunities including:

- Increased procurement of Tasmanian food, beverage and produce
- Increased space for RV and caravan and camping vehicles, that are underserviced by the current ship configuration
- New marketing opportunities for touring routes and drive product to a greater captive on board audience.

CHART 5.1.1 ARRIVALS TO TASMANIA BY SOURCE, TOURISM TASMANIA YEAR END JUNE 2019

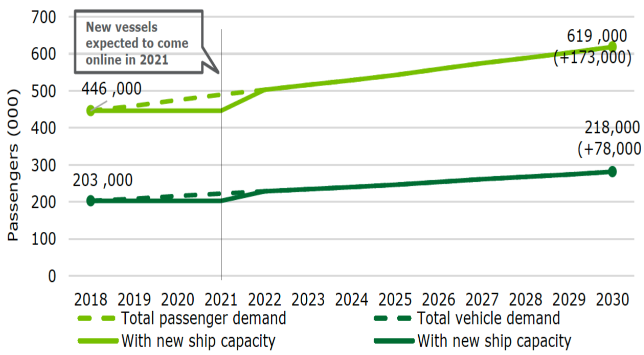
	Spirit	Air
Visitors	11%	89%
Nights	25%	75%
ALOS	18.5 nights	7.0 nights
Av. Spend	$3,230	$1,734
Holiday	70%	44%
International	7%	16%

· Of these, around 18,000 travel 'open jaw' – 12%. The majority of these left by Hobart airport, but arrived by Devonport airport.

· People who travel on the Spirits stay longer, spend more and disperse further.

Data source: Tourism TasmaniaTasmanian Visitor Survey YE June 2019.

CHART 5.1.2 PASSENGER AND VEHICLE DEMAND



Data source: Client data; Spirit of Tasmania; Deloitte Access Economics

NOTE: delivery dates for the new vessels has shifted

Visitors arriving by the Spirits of Tasmania are a unique subset of Tasmanian visitors. Visitors arriving by sea stay longer, an average of 18.5 nights compared with 7.0 nights for those visitors arriving by air. Seventy per cent of all Spirits of Tasmania arrivals are visiting for leisure and on average, their visitor spend is 86 per cent more per trip than air arrivals. Only 7 per cent of Spirits of Tasmania arrivals are international. The insight for the North West? An increase in the capacity of the Spirits of Tasmania creates an immediate tourism benefit with more experience driven, self-drive exploring visitors arriving every day.

5.2 TOURING HOLIDAYS & DRIVE JOURNEYS

Whether arriving by air or sea, touring is a strong motivator, along with nature/wilderness and culture/history for people when visiting Tasmania. The far north west visitors come to region as part of longer itinerary with visitors to the region staying on average 15.8 nights in the state, nearly double the state average of 8.2 nights.[3]

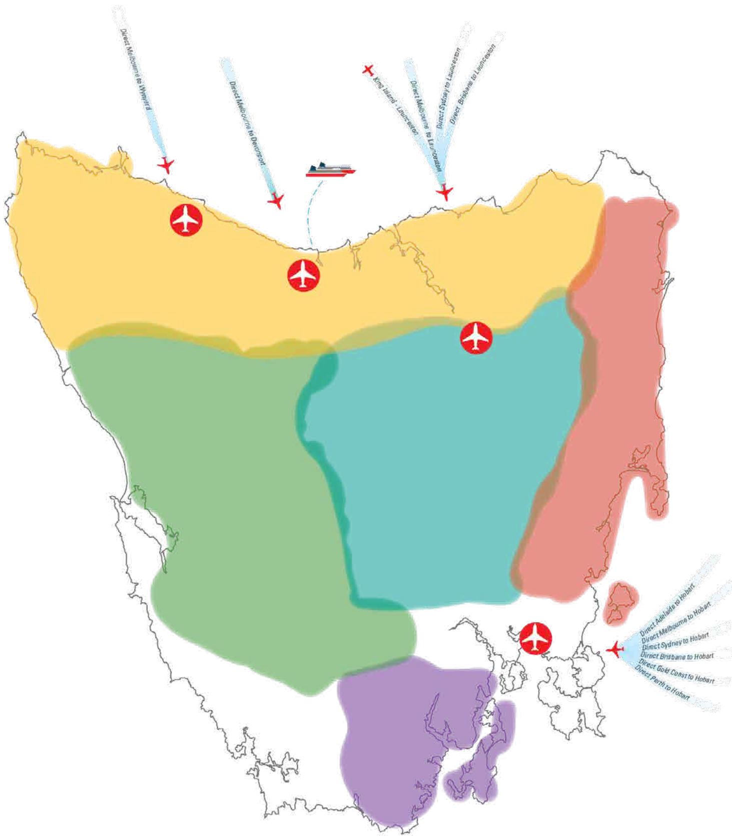
The Tasmanian Government is committed to making Tasmania one of the world's great drive touring destinations. The successful creation of the Great Eastern Drive and the Western Wilds has led to investment in the creation of three additional journeys for the remainder of the state.

Since the launch of the Western Wilds in 2018, Tourism Tasmania has focussed its attention on developing a coordinated self-drive/touring strategy for the state which speaks to this particular market. The Department of State Growth is working across government and with industry to implement the three new journeys, which will result in greater visitor yield and dispersal. The five official touring routes divide the state into consumable regions; the far north west's alignment is with the planned Northern Tasmania route, providing an easy navigator for visitors and a market ready product execution for Tourism Tasmania's campaigns and website.

There also exists opportunities for the region to leverage and engage touring visitors on the road by aligning local marketing, signage and storytelling, plus the creation of additional more localised themed drives.

Insights from the field trip identified the region could be better served by bringing together the experiences of the far north west under self-drive touring themes. The themes provide a stronger sense of journey, give focus for marketing storytelling and encourage travellers to continue to disperse into the region, unpacking the experiences further and further as they go. Themes also assist operators to improve their product and interpretation, guided by an overarching direction that's regionally cohesive.

CHART 5.2.1: FIVE DRIVE JOURNEY REGIONS FOR TASMANIA



5.3 CRADLE MOUNTAIN REDEVELOPMENT

The redevelopment of the visitor experience at Cradle Mountain will have a profound impact on the far north west. With 44% of all visitors to the far north west including Cradle Mountain in their itinerary on the same trip, improvement in the visitor experience and subsequent forecast growth in volume provides an immediate uplift opportunity for the far north west.

The redevelopment focuses on three key elements of the visitor experience: the gateway just outside the park, Dove Lake and the transport system linking these two sites.

[3] Tasmanian Visitor Survey year ending June 2019, Tourism Tasmania.

- The new gateway precinct includes a new Park Centre and future village concept that will include commercial opportunities to service the growing number of visitors. Stage one, which will be completed by June, includes a new Park Centre, café, tour operator shopfronts, amenities, car parking and landscaping.
- Construction of a new viewing shelter, blended into the landscape, commenced at Dove Lake in late February 2020. On completion, it will provide visitors with an inspiring viewing experience with the experience further enhanced by improved links to external viewing opportunities on the lake and at Glacier Rock
- A new diesel-electric hybrid bus system has already been introduced which has been praised by visitors. Consideration is also being given as to whether a cableway would be a viable long-term transport option.

These improvements drive further private investment in the area and will ensure that Cradle Mountain retains its reputation as a tourism icon well into the future and will ensure the visitor experience matches the expectations visitors have of such an iconic site.

5.4 TECHNOLOGY AND DATA

A range of other market factors will impact the far north west tourism demand and provide greater marketing and demand generating opportunities including:

- Tourism Tasmania's strengthening capability in visitor research providing aggregated travel data
- Increasing number of specialty data platforms and emerging tourism and wellness Apps creating new partnership opportunities in the digital space.

5.5 NEW CONSUMER BRAND AND SEGMENTATION

Tourism Tasmania's new consumer brand provides an opportunity to build depth in digital content and brand storytelling. Broadening the state's target audience to include segments that make up 33 per cent of the Australian travelling public, up from the previous 14 per cent, will result in an uplift in the state's destination awareness and appeal nationally.

The previous consumer segments focussed on, Life Long Learners, represented 14 per cent of the Australian travelling public and was made up of couples 40+ and couples 25-39 years old seeking touring experiences and short breaks with a focus on continuous learning and education through experiences. This audience continues to be a focus, but now becomes a subset of the two new audience segments:

THE RAW URBANITES: seek connection through their experiences, actively engage with product that deliver escape, a back to basics approach and reconnection with self, nature and others.

ERUDITES: are inspired by knowledge and culture, seek out learning experiences and those that challenge. They seek to step back and reflect, refresh and renew their own view of self and the world.

A more detailed description of the two segments can be found in table 5.5.1.

TABLE 5.5.1 DETAILED DESCRIPTIONS OF THE TOURISM TASMANIA EXPANDED MARKET SEGMENTATION

	RAW URBANITES **Nurturing and sensitive, honest and real.**	**ERUDITES** **Knowledgeable and cultured, clear and composed.**
Holiday habits	More likely to take a longer holiday, and as a result spend more. Seeking **down days** as well as fun things to do, completely turn off, happy to be (mostly) disconnected. Anxiety high in planning stages of journey.	Pre-planners, **squeezing in as much activity as they can**. High yielding and become destination advocates. More inclined to share their travels on social media. Fear of missing out so seek information before and during holiday.
Predisposition to travel	More likely to '**go off the beaten track**'. They often have too much annual leave or suffering work stress so may be prompted to take holidays by their workplace. Longer period between returning and starting to dream for the next holiday.	Less inclined to disperse; they are 'pulled' to destinations by product innovations and events, and will actively engage with the destination when there. Very little gap between returning and starting to dream about the next holiday. Trigger to travel is the pull of exploring a destination.
Age*	Spread across spectrum, however skew older 50+ age group.	Spread across the spectrum, no skews.
Location	More likely **NSW and VIC** than other states. Predominantly metro, though RU are more likely than Erudites to live outside Sydney and Melbourne.	More heavily **metro-based** than RU, and more likely to be in Sydney or Melbourne.
Life stage*	Any life stage, but skew to empty nesters (30%) and slightly skew to older families.	Any life stage, slightly over indexing as empty nesters or single.
Spending habits	Earn marginally less than Erudites, but they are willing to spend a longer time on holidays, to relax and reconnect with their loved ones.	Not afraid to 'splash out' and like a little luxury in their travel.
What they seek and why they travel	Interactions that are **engaged, honest, pure and real,** without cynicism or hidden agenda. Their communal nature seeks an outward connection with others, as well as the natural environment. The counter structure to the hectic, busy daily lives they lead is serious inner peace and finding themselves through being away from materialism, and unnecessary technology. Seek opportunities to switch off, refresh and rejuvenate through nature and rebuild connections. They need 'mindful moments' in holidays which allow them to be present, in order to return to everyday life refreshed.	Holidays for Erudites are about **switching on rather than switching off.** Unique experiences with rich culture, deep heritage, innovation and intrigue. Their self-contained nature seeks enrichment through reflection, discovery, contemplation and self-expression. The acquisition of knowledge and need to be a cultural pioneer is central to their travel motivations, and expressing themselves is paramount
Experiences they value	Seeking **moments of peace, connection, inspiration and captivation.** Types of experiences they value (in order of importance) are: 1. Natural experiences 2. Australian product 3. Return to basics 4. Local immersion	Seek **stimulation and enrichment.** Types of experiences they value (in order of importance) are: 1. Cultural immersion 2. Gourmet dining 3. Natural experiences 4. Australian product
Previous visits	Approximately 13% report visiting TAS in the last year.	Approximately 15% report visiting TAS in the last year.

** Although demographics are not part of the segmentation, they can assist in contextualising and imagining the segments. As they are based on travel needs, the segments are actually distributed across ages, income, gender, and household composition. Also, as cultural trends emerge and events occur across the nation, travel needs will change. As groups of people may then join the travel need group, the demographics might also change.*

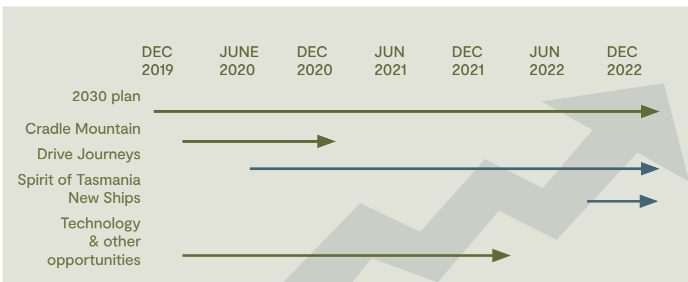
5.6 TIMELINE OF ENABLERS ON MARKET IMPACT FOR THE FAR NORTH WEST

PREPARING FOR THE ENABLERS

An insight of the group was the preparedness of the operators for the enablers on the cusp of impacting their region. An opportunity exists to:

- Prepare an enabler response plan, particularly focused on the Spirits of Tasmania, Drive Journeys and the potential increase in caravan and camping visitors to the far north west of Tasmania.
- Undertake a demand impact study to quantify the increase in visitors of the first three enablers as a base level of growth to the far north west of Tasmania.

TIMELINES OF THE ENABLERS



6. Emerging points of difference for the far north west region

Field trip participants were impressed with the naturalness and purity of the location and its overall sense of the far north west as being authentically Tasmanian. Locals lived very unaffected by the privilege of the beauty and purity; without indulgence or extravagance. Life, the experiences and their simplicity speak to an envious customer seeking paired back, disconnection from a frantic pace of life. There is a sense that people in the far north west have their priorities right.

The insights of the group overwhelming urge the region to consider its audience when identifying new tourism developments, to consider quality over quantity and keep the essence of privilege for those who make the time and effort to visit.

It should be noted that on a global scale the volume of tourism visitors to the far north west is very small. Insights from the trip reinforced that there is no 'silver bullet' for increasing visitation to the far north west. However, complementary layers or clusters of tourism products and experiences from across the region's points of difference can provide a compelling reason to visit and encourage longer stays.

Woolnorth aerial
© Paul Fleming

In the end, two points of difference emerged that served to position the far north west visitor experience from other regions:

1. THE RICH AND FERTILE FOOD BOWL:
the exceptional purity of the environment, the volcanic history of the land, how it is cultivated and the bounty to be had from the nearby sea.

2. THE RAW AND WILDER WESTERN COAST:
the far north west is a place of sanctuary, retreat and escape, all at once. The absence of crowds, pollution, noise and even phone reception provides opportunities for connection with nature, family and self and it offers a different kind of adventure.

The field trip group identified a third point of difference for the far north west region. The group observed that the area appears to have a rich Aboriginal cultural heritage. Visitors increasingly are seeking to understand Aboriginal culture and heritage and the group identified that tourism experiences that enabled this could not only be a genuine point of difference for the far north west, but could also provide benefits to the Aboriginal community. While this was identified as a point of difference, this would be subject to conversations with the far north west Aboriginal community, and as such any ideas have not been progressed further. The field trip group itself had a number of members with significant experience in developing tourism experiences and ventures with Aboriginal communities around Australia and would be open to further discussions on ideas.

7. Regional product development: a framework


Glamping sample

Depth of product, rather than one big attraction, serves a wider variety of audiences and holds greater promise for sustainable growth in visitor demand. Destination development can be understood against a 'Product Hierarchy' model[4] which provides a framework to consider the elements for the foundation of sustainable tourism growth.

The big hero experience is often what destinations will seek to develop and while signature experiences are important as a drawcard for a destination, they must be supported by other visitor experiences and foundation services to meet basic needs and expectations of visitors and extend stay.

It is vital that a region wide approach to improvement of the ancillary goods, services and products that serve as the foundation for tourism in region, be undertaken to ensure growth that is coming occurs on a solid foundation. These basics include visitor information services, signage, maps, guidance technology, WIFI and mobile phone coverage and access to quality toilets, food, beverage and coffee outlets at reasonable distances. Whether it's a caravan and camping customer or international high value travellers, having these services market ready is vital.

Growing the destination across all tiers of product promises to deliver a range of economic and social benefits to the communities in the far north west and strengthen the visitor economy, including:

- local employment and business opportunities in construction, hospitality and tourism,
- improved transport connections to the mainland and west coast; improved public facilities and more options for recreation and dining.

[4] Tourism Product Hierarchy adapted from the Australian National Landscapes Tourism Experience Development Framework 2011 p8 found at http://www.environment.gov.au/system/files/pages/f5e06426-5374-43cd-9873-fa321355ce9e/files/experience-development.pdf

7.1.1: PRODUCT HIERARCHY:

Any tourism region requires strong tourism foundations, with growth requiring development of the supporting and hero product to create step change increases in visitors.

The ideas generated through the field trip were analysed and assessed using seven criteria for their suitability to move forward into preliminary market testing. The criteria defined by the reference committee were:

1. Key points of difference: does the idea align with the emerging key points of difference of the region?

2. Grow the right audiences, sustainably: would the idea as a product appeal to the right audiences in sufficient volume to be viable?

3. Does the idea **align with the state's core visitor and drive touring strategies?**

4. Does the idea **match with the far north west brand attributes and values?**

5. Is the idea **capable of sustaining itself in the position of the region, now and into the future?**

6. Does the idea **provide differentiation from the rest of Tasmania** and if possible the rest of the world

7. Does the idea have WOW factor? Is there the opportunity to elevate to a being a tourism hero?

Scored on a scale of 1 to 5 for each section, an idea could score a possible 35 points. Originally planned to consumer test the top three concepts, four products scored the same allowing six ideas to be progressed through to market testing.

Once scored and scoped, preliminary market testing was conducted on the six priority concepts. Market testing involved a questionnaire conducted through 132 face to face interviews, sharing market concept visuals supported by written descriptions in July 2019 in the Cradle Mountain visitor precinct. Tasmanians were excluded from the sample so as to test concepts on visitors to Tasmania.

8. Priority concepts

The field trip generated 61 product development ideas which were scored on the seven assessment criteria outlined in Section 7. The top ranged ideas were then market tested with customers, stakeholders and industry. The long list of the product concepts, along with the field trip group scoring, can be found in appendix 3. The six product concepts tested with customers are outlined below.

The field trip group considered that no one idea was more important than the others, and concepts are not presented in a hierarchy or order of importance. The implementation of some or all simultaneously, along with the opportunity presented by the enablers detailed in section 5.0 present a unique meshing of opportunity over time that strengthens the overall impact on far north west visitor growth.

This report describes the tourism concepts and experiences in terms of their ability to grow the right audiences, sustainably, provide a sense of "wow" for the region and differentiate it from the other parts of the state.

1. REINVIGORATION OF THE TARKINE:

The opportunity to reinvigorate experiences in the Tarkine has already been identified in the existing proposal to develop the Tayatea Trail, a four day/ three night walk beginning in the Rapid River Valley near the junction of the Rapid River and the Arthur River on the Tarkine Loop Road. Improved offering at Dismal Swamp; themed drive with art, sculptures and interpretive self-drive app. Revitalising the available experiences and creating new Tarkine Forest experiences. This includes reinvigorating the product delivery at Dismal Swamp, offering glamping and more diversified adventure experiences in the region and developing themed self-drive and self-guided App tours for drives through the Tarkine Forests.

2. EXPERIENCES ASSOCIATED WITH THE ROBBINS ISLAND WAGYU CATTLE MUSTER:

Imagine an experience like no other: a guided tour to an observation deck for an interpretive film and lunch that explains the unique mustering techniques of moving cattle between the mainland and Robbins Island. Uniquely rounded out with a boat cruise or virtual reality horse riding experience, upgrade this to an exclusive overnight glamping stay for a Tasmanian farm stay with a difference.

3. NEW MARKETING AND MANAGEMENT OF COASTAL SHACKS:

What if it were possible to share a little of the uniquely Tasmanian coastal lifestyle in a north west Tasmanian shack? A marketing website representing a marketplace for shacks would bring together a collection of properties to tourists, delivering immersive experiences to tourists.

4. NEW AGRITOURISM EXPERIENCES AND FARM SHED RUSTIC ACCOMMODATION:

What if visitors could share in rich and abundant niche and at scale agriculture industry that flourishes in the far north west. Self-drive touring routes delivered through app's, operator support to develop unique customer experiences and grow their capability in storytelling and connection to the land would see increasing visitor numbers choose the north west.

5. IMPROVED EXPERIENCES AT TABLE CAPE: A LOO WITH A VIEW AND BOUTIQUE ACCOMMODATION

What if Table Cape became more than just a look out and a lighthouse? With development application approved for a luxury lodge on the cliff tops overlooking the bay, the stunning "blink and you'll miss it" flower farm season with its abundant carpet of tulip blooms and a clifftop walk between Table Cape Lookout and Table Cape Lighthouse reimagined with an expanded car park and "loo with a view", this could become a signature stop for those on their way to the far north west.

6. DEVELOPMENT OF MARINE BASED TOURING PRODUCT BASED FROM STANLEY:

Imagine a marine experience launching from the Stanley Wharf that includes a boat trip to Bull Rock to see the seals, possible snorkelling in some of the purest waters in the world, then exploring the sea caves and rock pools of the Rocky Cape National Park before a seafood lunch on the a secluded sandy beach.

That evening stay overnight in Stanley and be kitted out with night goggles and windbreakers to nestle into a bird hide as you watch little penguins return home to feed after a day hunting and gathering. The penguins march at eye level, oblivious to your presence, focused only on safe return to their waiting chicks.

8.1 REINVIGORATING THE TARKINE EXPERIENCES

LOCATION Dismal Swamp and surrounding Tarkine forests

HUB Smithton

VISION Bring the Tarkine to Life: the Tarkine forests provide an accessible and similar wilderness experience within close proximity of towns and hubs.

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food Bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provides differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

The adventure tourism attraction at Dismal Swamp has seen a significant investment in product and supporting infrastructure that is yet to be fully realised in its contribution to the region. In addition to the slide, walking trail and boardwalk there is a visitor centre, café and commercial kitchen, amenities building, roads, carparks, power and water supply, and sewage treatment plant. The attraction is currently closed.

According to the Adventure Travel Trade Association (ATTA) adventure tourism is forecast to grow at 17.4 per cent annually to 2023, more than double the global growth rate of tourism generally to become a US$1.3T industry segment.[5] Beyond Cradle Mountain and the Tasmania's Wilderness World Heritage Area (TWWHA), there is an opportunity for the Tarkine in the far north west to provide a similar experience in a less sensitive forest environment.

The insights from the field trip show there are four key areas to improve and reinvigorate the Tarkine Forest offering to customers, with an emphasis on using existing sites such as Dismal Swamp:

DIVERSIFY THE ADVENTURE OFFERING WITH INCREASED ACTIVITIES AND THINGS TO DO

Potential exists for additional adventure experiences such as high ropes courses, reactivation of the mountain bike activities, rope ladders/nets, zip lining and additional platform-based experiences for launching pads for extra adventure product. Theming to the Tarkine adventure story creates a level of differentiation. Consideration of any new activity will need to consider the risks of any development within a dynamic, mature forest environment.

ADD UNIQUE ACCOMMODATION

Greater yield exists from the market through unique platform style accommodation onsite. Utilising the platform concept off the slope could allow accommodation to feel like it is in the canopy – a rare nature-based experience and something not offered in Tasmania.

MOVE PEOPLE BACK UP THE HILL TO THE MAIN BUILDING IN SOME MECHANISED WAY

Providing mechanised access 120m directly down to the slide base and back up to the visitor centre could not only increase visitation from less able walkers, but shorten the return time for customers taking the slide and any other downward travelling adventure products (eg. zipline). The most readily built infrastructure that could deliver this service includes inclinators, chair lifts and cable cars.

[5] 2019, Allied Market Research for Adventure Travel Trade Association: Adventure Tourism Market, Global Opportunity Analysis & Forecast, 2017-2023.

THEMED DRIVES THROUGH THE TARKINE

The Tarkine, and in particular Dismal Swamp is in a unique position. Being outside the TWWHA means greater flexibility with respect to the range of activities possible and provides a sustainable way to concentrate visitor activities into singular, well managed locations. With a greater focus on year-round accessibility, this could appeal to travellers from a broad range of visitor segments.

CASE STUDY EXAMPLE – WONGA WETLANDS THEMED ROPES COURSE

SMA Tourism and Thompson Berrill Landscape Design developed a mountain bike trail network and ropes course for Wonga Wetlands (Albury NSW). The ropes course featured suspended objects known to have been lifted by a flood of the Murray River and left stuck in trees. Ropes course participants were encouraged to crawl through objects such as a truck, water tank and windmill, in order to pass through the course. In doing so, they learnt about the flood and its effects, and physically felt connected to what had happened. Nighttime optional elements include:

- the Beginner's route featuring special effect coloured lighting on the trees and platforms and within the challenges;
- the Intermediate route running with low level platform lighting and 'miners lights strapped to the helmets; and
- an annual special event on the ultimate challenge course

INSIGHT: ADD ACCOMMODATION TO THE SITE

The business could extract more yield from the market if it offered accommodation on site. Utilising the platform concept off the slope could allow accommodation to feel like it is in the canopy – a rare nature-based experience to date.

A low-cost accommodation option these platforms could be tented camping or glamping. The advantage of this product is a lower development cost and the potential to pack it up for the low season, to reduce deterioration of the assets.

8.2 EXPERIENCES ASSOCIATED WITH THE ROBBINS ISLAND WAYGU CATTLE MUSTER

LOCATION Cape Grim and Robbins Island

HUB Cape Grim

VISION A unique take on sustainable farming through the eyes of Cape Grim Beef.

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food Bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provides differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

Robbins Island is a 9,900-hectare island situated on the north western tip of Tasmania. The island, separated from the Tasmanian mainland by a highly tidal area known as Robbins Passage, lies south to the adjacent Walker Island. Robbins Island is the seventh largest island of Tasmania and is the largest freehold island in Tasmania. Over the years Robbins Island has changed ownership and to this day remains privately owned.

Situated on the north western tip of Tasmania, the prized cattle are grazed on lush pastures without supplements or hormones, all while breathing the cleanest air in the world.

The cool climate, salt air, and pristine environment are ideal for naturally raising some of the most tender and best tasting beef in the world. Several times a year, at dead low tide, bands of local horsemen walk the cattle over sandbanks and wade them through saltwater channels to move them peacefully between grazing areas.

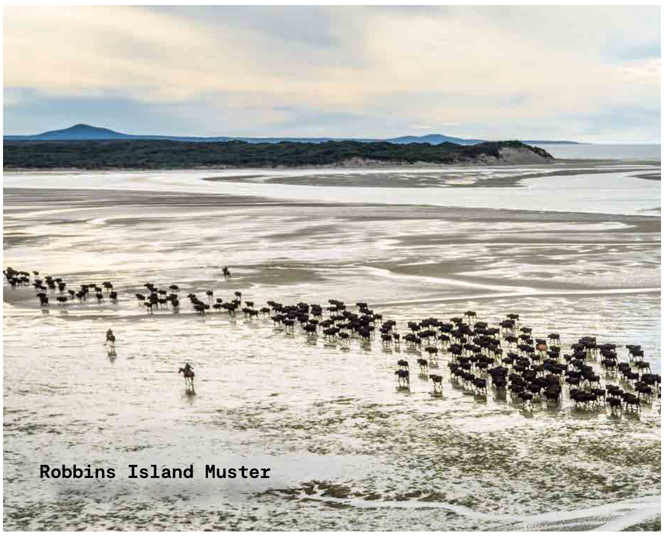
There is currently no way for visitors to experience the muster, despite requests being received by the owners from experienced riders and musterers.

The owners of Robbins Island support the development of tourism product on their island (and the region), but consider the following to be medium-long term concepts due to some other projects currently underway.

Product development could focus on:

1. Guided tour to the observation platform (including film and gourmet lunch)
2. Guided tour to the observation platform (including VR and gourmet lunch)
3. Guided day tour to Robbins Island (via boat), including a gourmet lunch (featuring wagyu local beef), with a film about the muster, horse ride over part of the muster route
4. Guided overnight tour to Robbins Island (via boat), including a gourmet dinner (featuring wagyu local beef), with a film about the muster, overnight stay in authentic accommodation, and either a horse ride or All-Terrain Vehicle ride over part of the muster route

Options 3 and 4 had the most market appeal when tested with customers.



Robbins Island Muster

8.3 COASTAL SHACK IMMERSION – MARKETING AND MANAGEMENT

LOCATION Region wide

HUB Arthur River/Nelson Bay/Temma

VISION Holiday like a Tasmanian

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provides differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

The term holiday shack is a term given to Australian holiday houses almost a century ago. "The Shack" as it was soon referred to, became the treasured iconic symbol of family holiday memories.

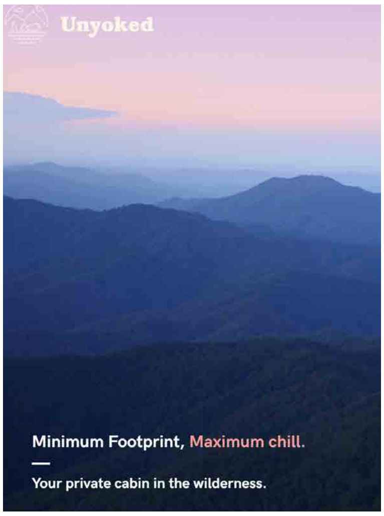
Shacks are uniquely appointed often with personal memorabilia, sparse and designed to reinforce a slow approach to life. A desktop audit of available shacks in the far north west indicates the following:

REGION	SHACKS	LISTED FOR RENT	CHARACTERISTICS
Arthur River	75	3	57 residents, eight families
Nelson Bay	15	0	Located in the Sundown Point State Reserve, Nelson Bay River Falls is located approximately 3kms to the east
Temma	22	0	Extreme drive, with muddy waterholes, steep boggy sand dunes, river crossings, and undetermined quicksand, access track is only suitable for high clearance, heavily modified 4WDs and experienced drivers
Total	112	3	

CASE STUDY EXAMPLE – UNYOKED

Launched in 2018, online marketplace Unyoked provides a themed consolidation portal for city dwellers looking for rustic country getaways and glamping experiences.

Overriding destination, unyoked customers are choosing the experience first and location second, seeking to satisfy a series of sustainability and experience criteria before they choose where their getaway is located.



If available at all, shacks are marketed through real estate websites mostly. An opportunity exists to bring shack marketing in the far north west under one website distribution, offering a unique connector with Tasmanian's favourite holiday.
Insights suggest this tourism opportunity could give rise to:

1. SINGLE OWNER OF A COLLECTION OF PROPERTIES AND / OR MANAGER OF ACCOMMODATION ON BEHALF OF VARIOUS OWNERS, DELIVERING (IN ADDITION TO CLEANING, MAINTENANCE AND CONSERVATION):

- guidance on what to keep / add / improve in the accommodation;
- purchase and curating of missing items, including quirky items;
- a diversity of experiences from remote and rough to more accessible and comfortable;
- food and beverage provisions ordered in advance, ranging from basic provisions to regional gourmet pamper packs; and
- sustainability elements (from reuse and waste minimisation to savings in energy and water)

2. MARKETING WEBSITE SPECIFICALLY FOCUSSED ON AUTHENTIC SHACK ACCOMMODATION, EMPOWERING THE CUSTOMER TO MAKE AN INFORMED CHOICE OF THE IDEAL EXPERIENCE TO MEET THEIR NEEDS THROUGH:

- quality images depicting the full accommodation experience;
- quality descriptions of the experience on property and surrounding local area;
- how to meet and spend time with locals that are happy to mix with visitors (local guides and activities); and
- sound booking system and contact point for customers to talk with.

This insight could give rise to a new business opportunity for someone local with a focus on technology or accommodation.

8.4 NEW AGRITOURISM EXPERIENCES AND FARM SHED/ RUSTIC ACCOMMODATION

LOCATION Region wide

HUB Wynyard/Burnie

VISION The north west food bowl delivers accessible visitors experiences to share, graze and taste.

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provided differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

The far north west region is predominantly used for farming, including beef, dairy, potatoes and vegetables, horticulture (flowers), oyster farming, and fishing largely through the port at Stanley. More recently developed niches include wagyu beef, honey and drinking water. Agritourism is less developed in the region than it is in the Devonport to Deloraine region, with fewer attractions, tours and drive route development.


Insights lead to opportunities such as:

DEVELOPMENT AND MARKETING OF NICHE AGRITOURISM EXPERIENCES:

It is reported that most of the farmers and fishermen in the region have little experience in tourism. However, there are a small number that are interested in engaging if there is an experienced helping hand to shape their offer into an agritourism experience, and then market it.

Some farmers could also use a tour operator to bring the visitors to them and conduct some of the agritourism experiences – with the farmer as a draw card, in a 'meet the grower' experience.

Rather than offering small parcels of funds to individual farmers, to deliver individual experiences, we recommend shaping a larger proposition with a single accomplished agritourism operator, to deliver and initiate marketing for multiple products across multiple farms. This applies the same principle as the coastal shacks – using economies of scale to achieve efficiency and quality. An expression of interest could be released, with the successful business having access to funds to help expand their business to deliver niche agritourism experiences in region.

A new initiative is the Duck River Meadows and Duck River Pavilions project located at the AgriTas site in Smithton where a new Robotic Dairy, Tasting Centre and Heritage Centre is under development with funding from the Australian Government. The new centre will provide the opportunity to link a working modern dairy industry visitor experience with produce consumption, and a district historical display explaining how the area's world-renowned modern day dairy industries came into existence.

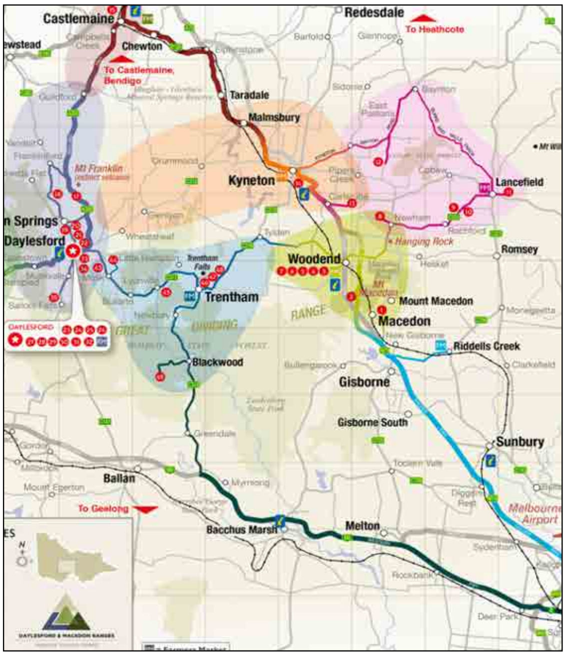
A COLLECTIVE OF FARM SHED ACCOMMODATION EXPERIENCES:

Often farmers need to replace their sheds, locate them on another part of their property, or build larger ones. In implementing one of these, the old shed may become redundant, creating an opportunity to conserve and reuse the building. The new use creates a means of generating supplemental income and

Red Cow Dairies
© Adam Gibson

CASE STUDY EXAMPLE – DAYLESFORD MACEDON PRODUCE

Since the early 2000's Victorian collective Daylesford Macedon Produce has provided a recognisable marketing brand for consumer to identify locally produced farm to food products and a connecting link between boutique agriculture, slow food culture, restaurants and tourism. With the support of local restauranteur and celebrity chef Alla Wolf-Tasker, artisan farmers find channels to market through café, restaurants, farm gates and local produce stores. The consumer is guided through the region by a regional app and a touring map known as the "tasty little touring map". Access to artisans is provided through open days, classes and workshops, while farmers markets are scheduled annually, and at times weekly, and promoted as the entry level contact point for visitors and locals alike.



CASE STUDY EXAMPLE – OFF THE TABLE AGRITOURISM DEVELOPMENT & MARKETING

The Tasmanian business Off the Table is helping to design and market experiences that assist visitors get to behind the scenes of Tasmania's top food brands. Taking a provenance angle, these experiences take visitors onto private farms to discover seasonal produce that's local to the region. Examples include:

- behind the scenes look at how eggs are laid, washed, packed and sold;
- hunt for winter truffles and elusive summer black truffles, learn how to locate them underground and the art of digging them up, lunch featuring truffle tasting; and
- visiting the world of heirloom tomatoes at Tasmanian Natural Garlic & Tomatoes, with a farm tour then tasting flight matched with champagne style apple cider.

These products are well matched to the Tasmanian target markets of Raw Urbanites and Erudites.

Off The Table has also introduced a ticket system in various restaurants and supermarkets across Tasmania. Customers that spot the ticket can scan it to get connected to the supplier and related agritourism experiences.

The business is on a major growth trajectory and is seeking to help build and market new provenance inspired experiences across Tasmania, including far north west region. The business would like to develop experiences based around seafood, beef, dairy and horticulture. Product concepts already being concepted for the region include visits to an organic dairy milked by robots and Devonshire Tea, and a Wagyu Beef experience on Robbins Island (see Section 5.3). The business is seeking capital to develop and set up the marketing of these new products.

More information: https://offthetable.io/

employment for family members in doing something other than / in addition to farming. This can also be a means of keeping family on farm.

The opportunity for adaptive reuse of redundant farm sheds is the authentic inland accommodation equivalent to coastal shacks. The authenticity is based in the premise that the building was originally built for agricultural purposes and is still surrounded by agricultural activity. The adaptation of farm sheds into accommodation needs to retain and conserve as much of the original fabric as possible, so that the original use is clear. Like coastal shacks, the fitout is critical to enshrining the authenticity; meaning keeping things simple and functional. Varying levels of comfort all the way up to luxury is possible, providing the original use remains easy to interpret.

This opportunity to adapt and operate farm sheds for rural authentic accommodation is a response to the first opportunity being implemented. In other words, the region first needs daytime agritourism experiences, then authentic farm shed accommodation to support them.

8.5 IMPROVED EXPERIENCES AT TABLE CAPE

HUB Wynyard/Table Cape

VISION Acres of patchwork; gateway to the far north west

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food Bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provides differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

The plateau of Table Cape is Wynyard's most remarkable natural wonder – a 12-million-year-old volcano. Sitting at 180 metres high, it dominates the Wynyard coastline and offers spectacular views of Tasmania's coast and agricultural farmlands. From the viewing platform, on a clear day, visitors can see George Town's Low Head and mountain ranges over 175 kilometres away.

Table Cape is also home to the Table Cape Tulip Farm where acres of patchwork fields explode with colour each spring. Viewing the tulips attracts significantly more visitors in season than the rest of the year. However, there is no interpretation on the site. Interpretation could not only provide more understanding and connection to the view, fields and activity but could act as a supporting experience for the majority of the year when there are no tulips.

FIGURE 9.5.1 TABLE CAPE, IN SEASON TULIP FARMING, AND THE TABLE CAPE LIGHTHOUSE

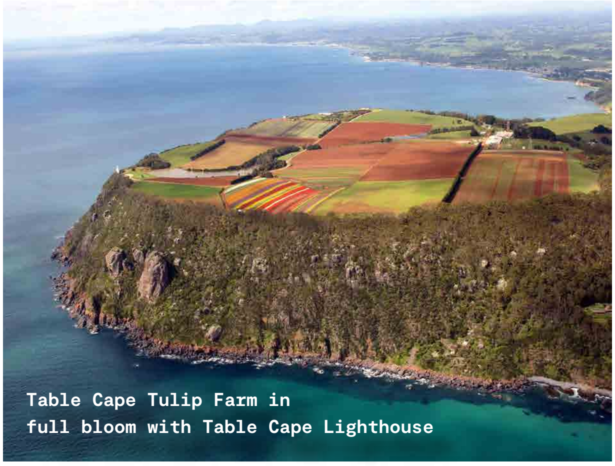


Table Cape Tulip Farm in full bloom with Table Cape Lighthouse

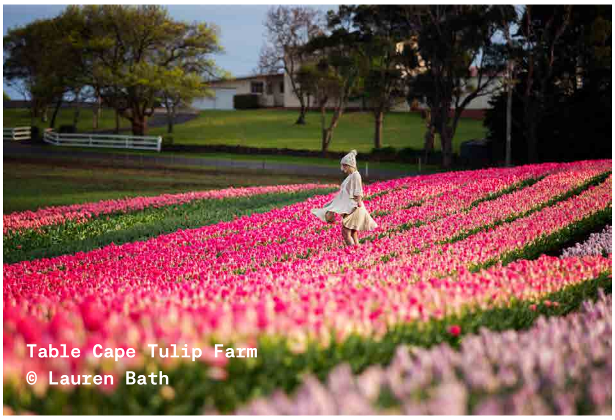


Table Cape Tulip Farm
© Lauren Bath

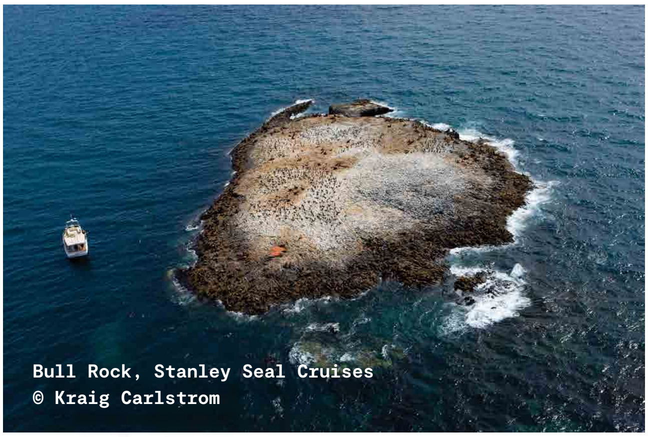
It is a short walk along the cliff-top to the Table Cape Lighthouse, the only operating lighthouse open for tours in mainland Tasmania. Access into the lighthouse is by guided tour and the highlight is magnificent views from the balcony. These breathtaking Table Cape views can also be enjoyed from the stunning Table House Farm.

Technology could be used to enhance the experience: showcase what the visitor experience looks like in full bloom at alternative times of the year; storytelling and self-guided touring maps are just a few ways to incorporate this unique landform into people's itineraries.

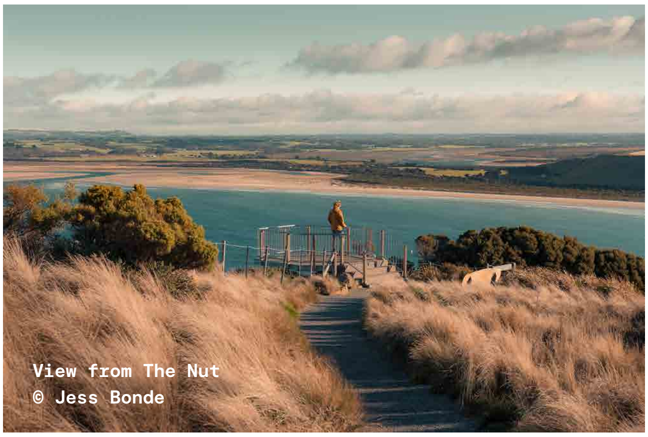
A LOO WITH A VIEW:

Table Cape is a very popular attraction during spring (when the tulips are peaking prior to harvest). Currently the road ends without an adequate turning circle, long vehicles and caravans struggle to safely turn around. In addition, there are no amenities. The stunning outlook offers the opportunity to implement public amenities that take advantage of the view, creating a social media talking point and share moment.

The Wynyard Destination Action Plan identifies the need for infrastructure including amenities in the region.[6]



Bull Rock, Stanley Seal Cruises
© Kraig Carlstrom



View from The Nut
© Jess Bonde

[6] Wynyard Destination Action Plan, 2017-2023 supported by Tasmanian Government, Cradle Coast Authority and Waratah-Wynyard Council.

8.6 STANLEY MARINE BASED EXPERIENCES

LOCATION Port Stanley, Bull Rock, Godfrey Beach

HUB Stanley

VISION Far north west adventure by land and sea

GOALS

- Speaks to the theme of Raw & Wilder West Coast and Food Bowl
- Grow the right audiences, sustainably
- Aligns with the state's core visitor and drive touring strategies
- Match with the far north west brand attributes
- Position the region in line with the experience it represents now and, in the future
- Provides differentiation from the rest of Tasmania and if possible the rest of the world
- WOW factor – opportunity to elevate to a hero

Wildlife viewing is a major motivator for travel and overnight stays and is very popular with the target markets of Raw Urbanites and Erudites. Stanley already has well known populations of seals and penguins.

Bull Rock is a very small rocky island just one kilometre offshore from Stanley. Australian fur seals use Bull Rock as their haul-out and rest area. They lay in the sun, feed and play in the immediate surrounding water. The bull seals vary in size from 200 to 350 kilograms, while the females are around 180 to 200 kilograms. Visitors can see anywhere from 50 to 500 seals - bulls, females and juveniles. Bull Rock is also popular with the black-faced cormorant, oystercatchers and Pacific gulls, and sometimes bottle-nose dolphins.

Additionally, between November and March penguins leave the ocean to return at night to burrows and their chicks cross multiple locations along the north west coast, including Lillico Beach just west of Devonport and the townships of Penguin, Wynyard, Burnie, Low Head and Stanley. Penguin viewing is very popular; enough for several tourism operators to provide guided product.

Insights suggest the following opportunities could be explored:

A NEW SEAL WATCHING PRODUCT:

A highly immersive seal encounter that is quite different from existing products in the market: Intimate groups of 20 coming within close connection of wildlife and the natural environment, in a vessel that provides optimum viewing opportunity, year-round operation and maximum comfort.

The experience could include boat cruise, nature and wildlife interpretation, food and wine experiences and possibly snorkelling (weather permitting).

A NEW PENGUIN EXPERIENCE AT GODFREY BEACH:

Catering for a higher value traveller, insights suggest the current free penguin watching at Stanley's Godfrey Beach via a viewing platform could provide a base starting point for an additional value-added experience that is a paid product. Some penguins move well beyond Godfreys Beach to burrows throughout the township.

CASE STUDY EXAMPLE – SEAL TOUR (SWIM AND SNORKEL) – WILD OCEAN TASMANIA

An example of a marine business in Tasmania is Wild Ocean Tasmania which operates October to May, Duration: 3 – 4 hours, $195, max 12 on boat and eight swim participants at once. The seal tour (swim and snorkel) features snorkelling with seals and other marine life. The operator has a pontoon and a floating mat (similar to a large yoga mat) that swimmers can sit / float over while viewing the seals and marine environment. Customers only have to keep their legs on the mat and can slide off the mat with their upper body. The seals can choose if they want to play with people and they end up being much more inquisitive and come much closer.

Wild Ocean Tasmania provides a dry-suit that customers wear on top of their clothes, as well as a mask & snorkel (and hoodies, gloves and booties if needed). In addition to watching seals swim and play, customers can view a giant kelp forest and spiralling schools of fish. The operator also provides a detailed interpretation of the coastline and wildlife in English and German, Tasmanian food and beverage, and a usb of all photography and videos.

Australian Fur Seal
© Sean Scott

Wild Ocean

9. Quick wins and low hanging fruit

Additional to the priority concepts, the field trip identified a number of quick wins, many supporting the enabling projects, that if addressed could support an enhanced visitor experience and opportunity to generate additional demand for the region:

ACTION	TIMING 0-6 MTHS	TIMING 6-12 MTHS	TIMING 12-18 MTHS	NOTES
Increase market awareness of far north west experiences - Increase digital content development to align with new tourism brand and audiences segments				Support RTO to develop tool kits for regional tourism operators to develop self-grown content. Share best practice from other RTO's. Bring other operators from other regions to show case what's possible.
Bringing it together - Drive Journey and shorter itineraries showcasing the far north west are a great way to show visitors how they can bring the region together – leverages Spirit travellers who are doing longer trips and have potential to extend stay in far north west.				Develop Hero drive route and range of other itineraries to support themes, triggers for travel and specific target audiences.
Partner with distributors – Make content available through Tourism Tasmania and other partners (eg. Spirit), Apps and booking channels. If no WIFI, offline options.				Develop a digital distribution plan for travel across accommodation, activities and partners. Focus on enablers, drive market and existing segments (eg: caravan and camping).
Collaborate across industry - Create natural clusters and cross promote each other's products				Develop sector plans by theme. Identify if sub marketing collaborations such as food and drink sectors, hospitality, nature based/adventure
WIFI at properties				Identify opportunities for business government subsidies for upgraded property WIFI through NBN and 5G to deliver better business experiences and customer connectivity.
Tourism signage at properties, touring route and the region				Align visitor touring route and themed trail signage vertically with visitor information centres and online mapping tools.
Great customer experience training				Take advantage of the Tasmanian Hospitality Association Great Customer Experience training available to all members and regions.
Tourism business coach and support				Set up a tourism mentoring program to assist businesses understand the evolution of their business and what comes next in the cycle. Additionally, to support those not currently in tourism to make the pathway to bringing visitor experiences into their business or starting a new business.
Marketing training and support – new digital, social media				Offer digital and social media marketing mentoring to help businesses take advantage of the tools available to connect with the new customers.
Enabler planning				Develop a regional opportunity plan for the tourism enablers to ensure region wide readiness for the new Spirits of Tasmania vessels and Cradle Mountain facility upgrades.

10. Surrounding investment

Key steps are already underway towards achieving the goals of growing tourism and the visitor economy in the far north west. Beyond the enabling projects outlined in section 5.0, the region is also the beneficiary of a range of state and community projects designed to support the growth in the broader regional domestic product:

PARKS AND WILDLIFE SERVICES NEXT ICONIC WALK PROJECT:

In July 2019, it was announced that the Tyndall Range, on Tasmania's wild West Coast has been chosen as the preferred location for the next iconic walk which will showcase all this unique region has to offer, as well as further enhancing the region's reputation for eco-tourism and nature-based experiences. The proposal is currently in the feasibility assessment stage. Should it proceed, the planned investment of $20 million on the walk will attract nature tourists keen to explore in more depth the wilds of Tasmania. Departing from Queenstown, visitors will be encouraged to explore more broadly pre and post walk, using either the Spirit of Tasmania or the airport access in the state's north to access to trail head.

RE-SEALING OF THE BASS HIGHWAY:

The Department of State Growth is investing in the re-sealing of the Bass Highway with the goal to increase safety and decrease travel times between key nodes. For visitors to the region, this will improve the accessibility of the region and improve travel times for those keen to explore the more remote icons.

WEST BY NORTH WEST (RTO):

The Regional Tourism Organisation supporting the far north west region has been reconstituted with a dedicated executive working with regional industry, councils and stakeholders under the guidance of a skills-based Board. The new and locally-based executive team, in place since October 2019, provides dedicated support for destination development.

LUXURY ACCOMMODATION PLANNED FOR STANLEY AND TABLE CAPE:

Two separate private accommodation developments have been scoped at both Stanley and Table Cape with the view to attracting investors and bringing to market regionally appropriate signature offerings. The projects are in differing stages of community and permit consultation but will provide much needed new luxury accommodation to attract the high value travellers.

NEW DESTINATION MARKETING:

Tourism Tasmania has launched a new tourism brand campaign in October 2019, that features Stanley and the Nut as a backdrop to one of the television commercials shown in key domestic markets and focusing on new Erudites and Raw Urbanites audiences.

CRADLE MOUNTAIN RENEWED VISITOR EXPERIENCE:

Visitors to Cradle Mountain exceeded 300,000 for the first time in 2019-20. This exceeds the visitor numbers forecast for 2023 in the Cradle Mountain Master Plan. Cradle Mountain's unique status is delivering life changing moments and truly unique wilderness experience with a growing global reputation. Research conducted for the Master plan forecast that the redevelopment would in itself result in a spike in growth of up to 40,000 visitors each year which would then be maintained on trend.


Mount Murchison
© Jess Bonde

APPENDIX 1:
Participants & field trip itinerary

PARTICIPANTS

Tourism leaders from Tasmania, other Australian states, and New Zealand were invited to join the Field Trip, based on their creativity and expertise in different tourism sectors.

ANDREW MCEVOY (TRIP LEADER)

Chair: SeaLink Travel Group; SkyBus (AATS), and Tourism and Transport Forum. Former Managing Director, Tourism Australia

MICHELLE COX

Board member: Tourism Tasmania; Linchpin Company. Company Director Bastion Effect and Bastion EBA. Former Executive Director and Global Chief Operating Officer, Bastion Collective. Former Managing Director: STA Travel – Asia Pacific; Southern Lodges Australia.

JOHN FITZGERALD

Chief Executive Officer, Tourism Tasmania

ROBERT PENNICOTT

Tourism operator, entrepreneur, and founding owner of Pennicott Wilderness Journeys

DANA RONAN

Former owner, Twelve Apostles Lodge Walk; former Executive Officer, Great Walks of Australia, and former Chief Marketing Officer, Discovery Holiday Parks

JOHN SHARPE

Tourism operator, entrepreneur, and founding owner of Riverlife Brisbane; Tangatours; Northshore Harbour; P&O Edge, and Walkabout Creek Adventures

BRETT TOROSSI

Tourism operator, entrepreneur, and director of Avalon Coastal Retreat Pty Ltd. Chair of the Heritage Council of Tasmania. Board member: Tourism Tasmania; Brand Tasmania; Tasmanian Museum and Art Gallery

DARRYL WILSON

Chief Executive Officer, Wilsons Abel Tasman

Representatives from Tourism Tasmania, the Office of the Coordinator General, Tasmania Parks and Wildlife Service, the Stage 1 'scribe', and the Stage 2 project consultant from SMA Tourism also attended and contributed to the concepts and recommendations produced during the Field Trip.

TOURISM TASMANIA

Mark Jones, T21 Director (Day 1 only)

Allison Anderson,
Manager Research and Insights (Day 1 only)

Renee Harrington, Driver/Guide

OFFICE OF THE COORDINATOR GENERAL

John Perry, Coordinator General (except Day 3)

Jessie Stanley, Project Manager
– Reimagining our Region: far north west

TASMANIA PARKS AND WILDLIFE SERVICE

Brendon Clark,
PWS Regional Operations (Day 1 and 2 only)

PROJECT CONSULTANTS

Megan Tighe, Stage 1 – Field Trip Summary Report

Simon McArthur,
SMA Tourism, Stage 2 - Action Plan Development

ITINERARY

The logistics of the Field Trip were coordinated by Tourism Tasmania. As a typical entry point to the far north west, Devonport was selected as the key access point for participants to commence the journey arriving via air or land transport.

The Field Trip participants were immersed in the far north west for three days. They drove directly from Devonport to the target region, travelling through Wynyard, Boat Harbour, Stanley, Smithton, the Tarkine, Marrawah, Arthur River, Corinna, and Waratah. The itinerary included stops in towns and at viewpoints, as well as short famils at a range of existing tourism attractions and experiences. Participants experienced the region on foot, by bus, and on water. The Field Trip also included a meet and greet 'mini-expo' with local tourism and agribusiness operators, held in Stanley.

The Field Trip concluded at Cradle Mountain, which exercises a strong influence on visitation to the far north west, although just outside the target region. Participants were provided with a briefing on the Cradle Mountain Masterplan, before a final workshop to capture ideas and identify challenges for growing tourism in the far north west.

APPENDIX 2:
2019 Caravan and Camping Data Report

Mr S Lamont, CEO
Caravan Industry Association of Australia Ltd
214 Graham Street
Melbourne SA 3207

12 December 2019

Dear Stuart

COMPILATION REPORT

We have prepared the following analysis based upon information as listed below:

- Motor Vehicle Census: Campervans and Caravans by Make, Model, Postcode, Tare, GVM, Vehicle Body Type and State, At 31 January 2019: January 2019 Copyright © Commonwealth of Australia 2019 (including prior releases)
- Australian Bureau of Statistics – Australian Demographic Statistics, 3101.0, Population by Age and Sex Tables, at March 2019, Released at 11.30 am (Canberra time) 19 September 2019 (including prior releases) Copyright © Commonwealth of Australia 2019 (including prior releases)
- Vehicle Standard (Australian Design Rule – Definitions and Vehicle Categories) 2005 Amendment 16, May 2016, Copyright © Commonwealth of Australia 2016.

The analysis must be read in conjunction with this compilation report and the analysis has been prepared at the request of the Caravan Industry Association of Australia Ltd for their exclusive use and benefit. We do not accept responsibility to any other person for the content of this analysis. It is the responsibility of the Caravan Industry Association of Australia Ltd to ensure that the information meets their requirements.

Our procedures use accounting expertise to collect, classify and summarise information provided to create the accompanying report and do not include verification or validation processes. No audit or review has been performed and accordingly no assurance is expressed.

To the extent permitted by law, neither the firm nor any member or employee of the firm undertakes responsibility in any way whatsoever to any person (other than the Caravan Industry Association of Australia Ltd) in respect of the report, including any errors or omissions therein. No person should rely on the report without having a review or audit conducted.

Yours sincerely

BDO Advisory (SA) Pty Ltd

Rudy Pieck

Director

2019 REPORT SUMMARY

641,644 CARAVANS

REGISTERED AT 31 JANUARY 2019

4.7% GROWTH

DECLINE IN THE GROWTH RATE FROM 4.95% IN 2018 AND 5.2% IN 2017

6210 POSTCODE

CONTINUES TO HAVE THE HIGHEST COMBINED NUMBER OF COMBINED CARAVAN AND CAMPERVAN REGISTRATIONS

500KG – 1 TONNE

THE MOST COMMON WEIGHT RANGE FOR REGISTERED CARAVANS

69,693 CAMPERVANS

REGISTERED AT 31 JANUARY 2019

17 YEARS

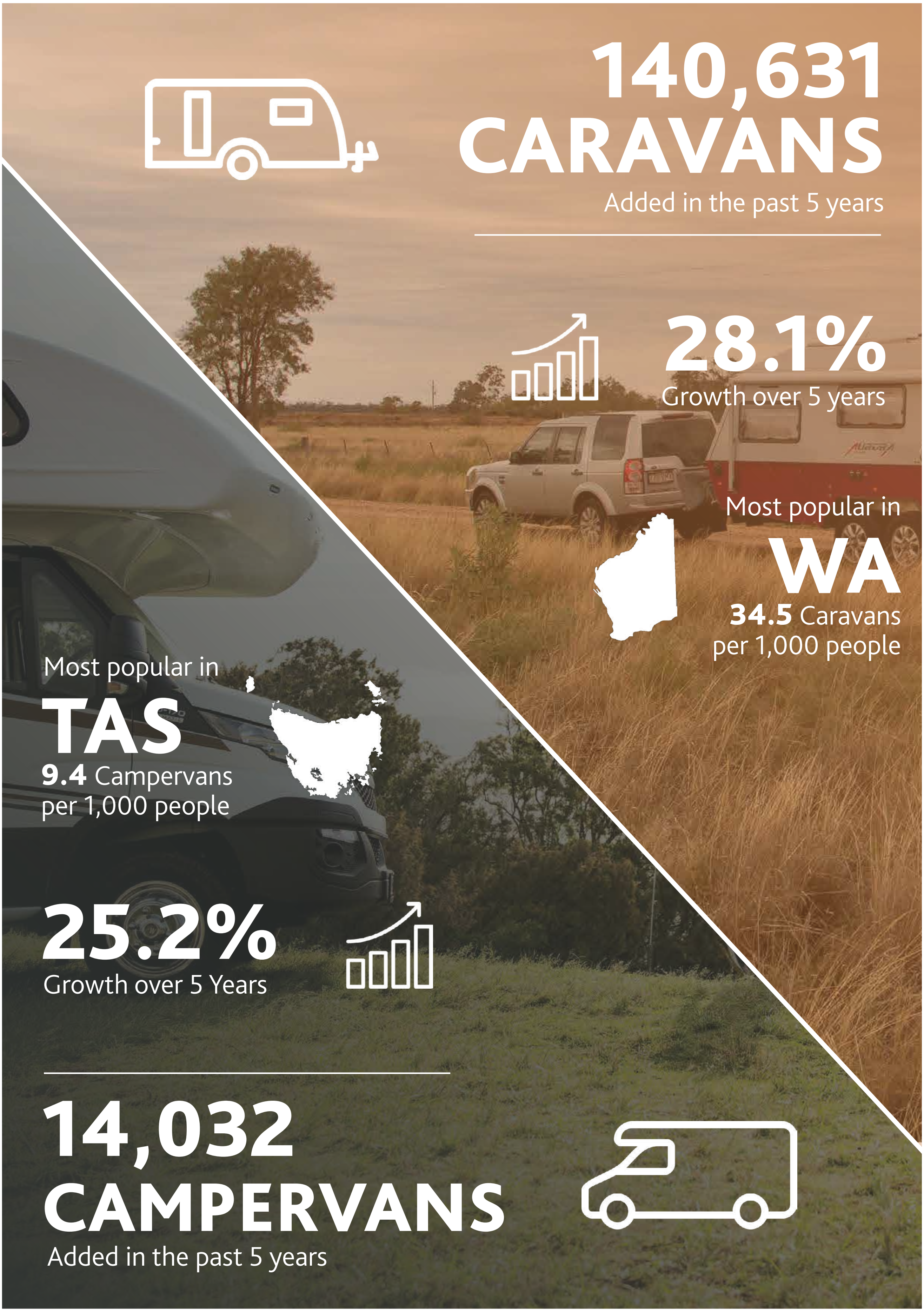
THE AVERAGE AGE OF CAMPERVANS IN AUSTRALIA

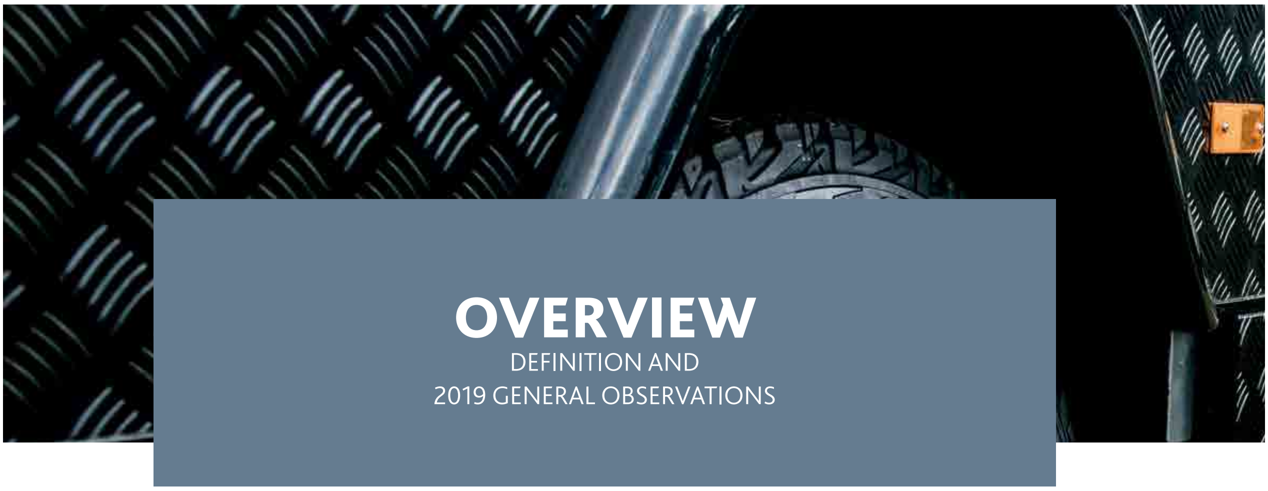
67% DIESEL

67% OF REGISTERED CAMPERVANS RUN ON DIESEL, A STEADY INCREASE AS THEY REPLACE LEADED VEHICLES

3 – 5 TONNES

THE MOST COMMON WEIGHT RANGE FOR REGISTERED CAMPERVANS


140,631
CARAVANS
Added in the past 5 years
28.1%
Growth over 5 years
Most popular in
WA
34.5 Caravans
per 1,000 people
Most popular in
TAS
9.4 Campervans
per 1,000 people
25.2%
Growth over 5 Years
14,032
CAMPERVANS
Added in the past 5 years



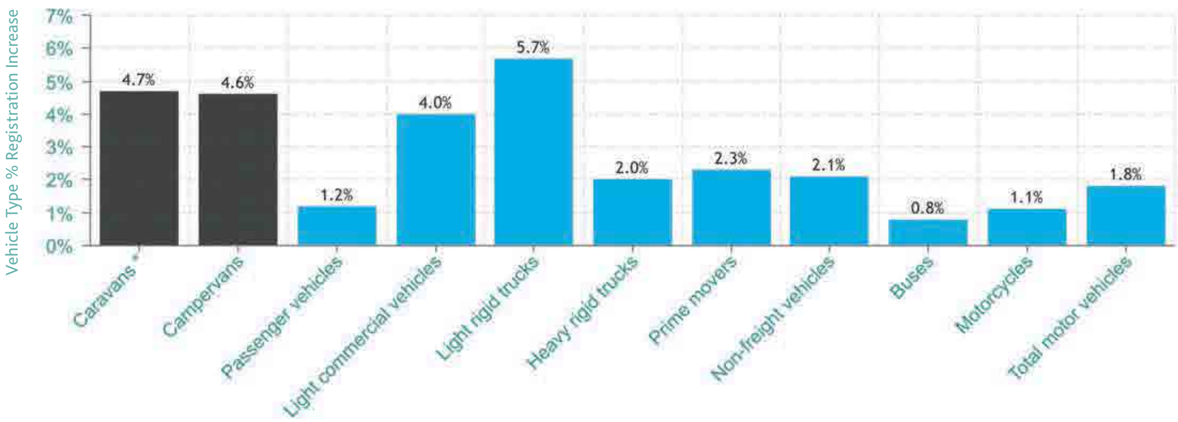
OVERVIEW

DEFINITION AND
2019 GENERAL OBSERVATIONS

WHAT ARE CARAVANS AND CAMPERVANS?

- **Campervans** as defined by the Australian Bureau of Statistics are self-propelled motor vehicles containing an area primarily used for accommodation. This definition would include vehicles commonly referred to as motorhomes.
- **Caravans** are defined as 'any enclosed trailer designed primarily for human occupation whilst stationary' (Vehicle Standard (Australian Design Rule – Definitions and Vehicle Categories) 2005 (Cth)).

Figure 1: Annual Registration Change by % Vehicle Type - 2018-2019



OVERVIEW

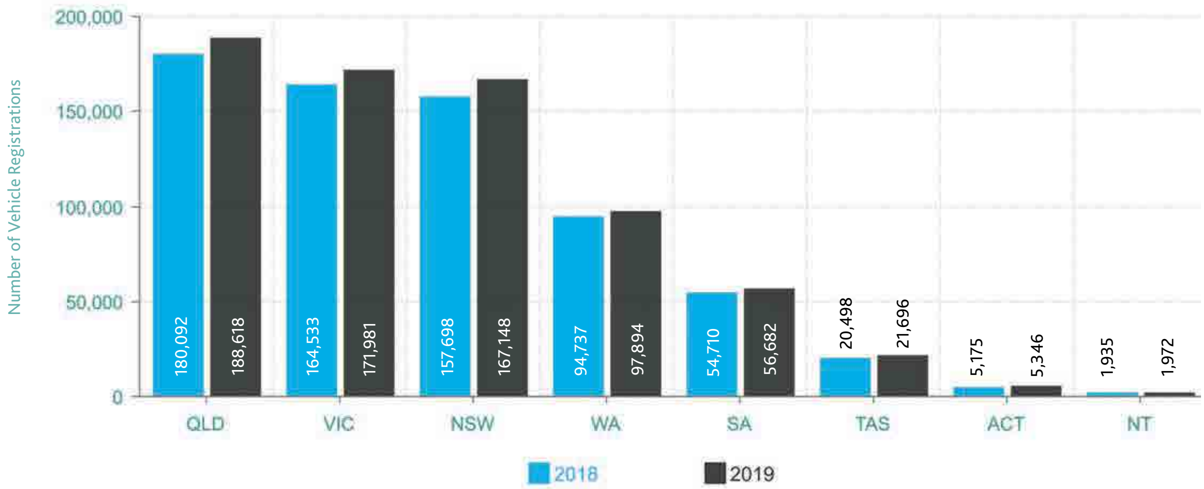
- Combined Campervan and Caravan registrations reached 711,337 at 31 January 2019.
- Comparing 2019 Campervan and Caravan registrations with 2018 shows an increase of 31,959 or 4.7% over the past year.
- **Campervans** registered in Australia at 31 January 2019 totalled 69,693 compared to 66,611 in 2018. This equates to a 4.6% increase.
- **Caravans** registered in Australia at 31 January 2019 were 641,644 compared to 612,767 in 2018. This is a 4.7% increase.
- The graph above shows the percentage increase of all motor vehicles compared with Caravans and Campervans in Australia between 31 January 2018 and 31 January 2019.
- After light rigid trucks, Caravans (4.7%) and Campervans (4.6%) had that highest registration increase between 2018 and 2019.

TOTAL REGISTRATIONS

COMPARING 2018 V 2019 CHANGE

TOTAL REGISTERED CARAVANS & CAMPERVANS

Figure 2: Total Caravan & Campervan Registrations 2018 v 2019

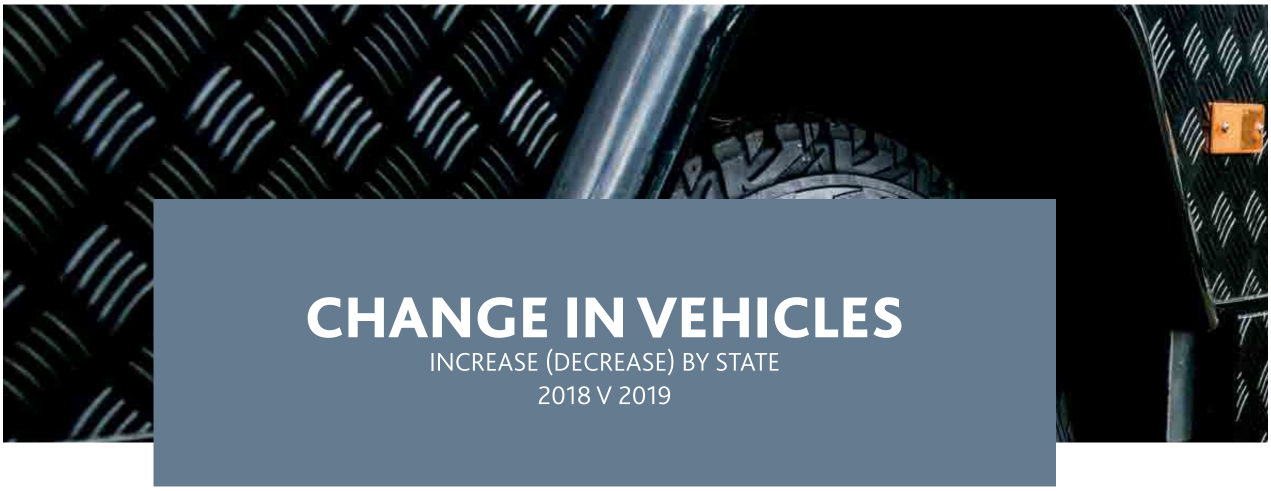


- Queensland continues to have the largest fleet of Caravans and Campervans in Australia, with a combined total of 188,618 vehicles, equating to 26.5% of all recreational vehicles in Australia.
- New South Wales outperformed Queensland for the highest overall increase in total registrations of Caravans and Campervans from 2018 to 2019, with an increase of 6%. Queensland accounted for 26.7% of the overall increase, down from 28.9% in 2018.

Since 2014 there has been a

27.7%

Increase in the number of registered caravans and campervans in Australia

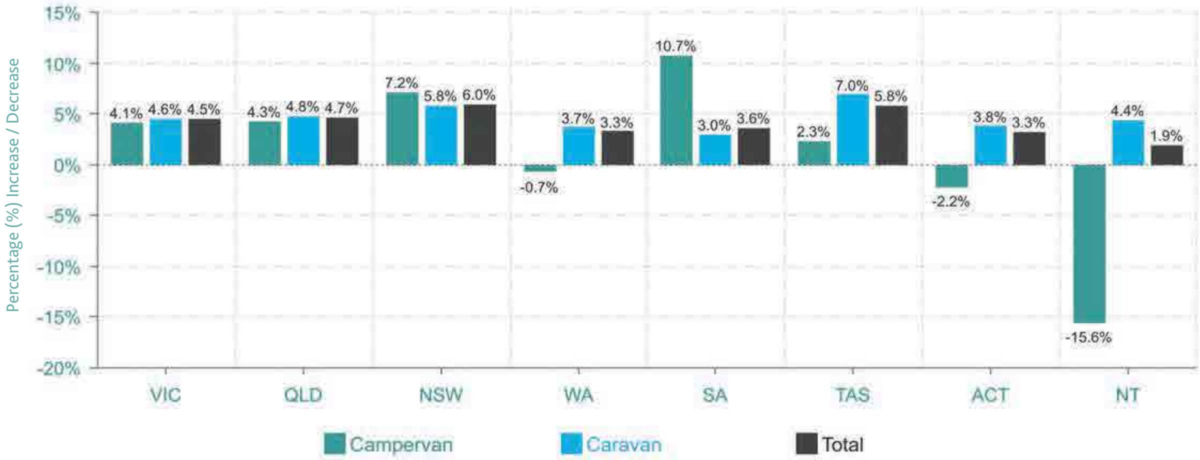


CHANGE IN VEHICLES

INCREASE (DECREASE) BY STATE
2018 V 2019

PERCENTAGE (%) CHANGE IN REGISTERED VEHICLES

Figure 3: Percentage change by State and Category of registered Caravans and Campervans - 2018 v 2019



4.7%
Caravans
% Change 2018 v 2019

4.6%
Campervans
% Change 2018 v 2019

- New South Wales continued to recorded the fastest growth rate for total Caravan and Campervan registrations at 6.0% in 2019.
- Tasmania also reported a strong increase in the growth rate at 5.8%.
- The growth rate for Campervans in the Northern Territory continues to show significant volatility year on year, largely due to relatively low overall vehicle numbers which range between 206 and 244 registered campervans over the past four years.
- Caravan registrations in the Northern Territory have maintained a steady increase.
- In 2019, South Australia recorded the highest percentage increase for Campervan registrations at 10.7%.
- Campervan registrations in Western Australia and the Australian Capital Territory continue to decline at a rate of (-0.7%) and (-2.2%) respectively. Caravan registrations in these States show positive growth.
- Tasmania recorded the highest increase in registered Caravans at 7.0%, followed by New South Wales at 5.8%. It must be noted that due to the relatively small number of registrations in Tasmania, a small absolute change can cause a large movement in percentage relative to States with larger overall populations.

PER CAPITA REGISTRATIONS

CARAVAN AND CAMPERVAN REGISTRATIONS PER 1,000 PEOPLE

2018	2019
2.7 Campervans Per 1,000 People	2.8 Campervans Per 1,000 People
Caravans Per 1,000 People 24.6	Caravans Per 1,000 People 25.4

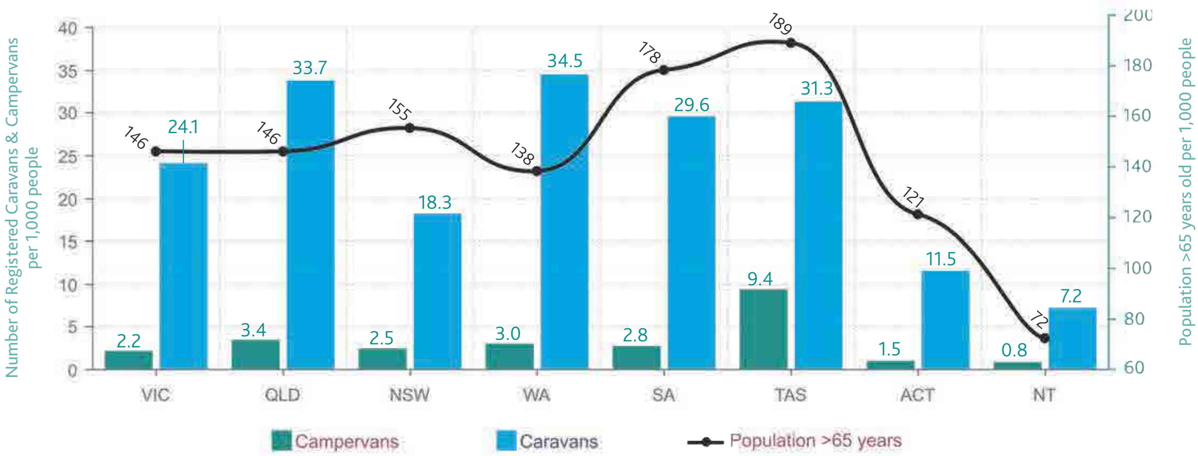
Figure 4: Total Caravan and Campervan Registrations per 1,000 people 2018 v 2019

- In 2019, Tasmania had the highest number of recreational vehicles per 1,000 people, calculated at 40.7 vehicles. This increased from 39.0 vehicles per 1,000 people in 2018. Consideration must also be given to the high rental market present in the state.
- Western Australia was the second highest with 37.4 Caravan and Campervans per thousand people, and Queensland at 37.2 per 1,000 people came in third, despite Queensland holding the highest overall number of recreational vehicles.
- The Northern Territory continued to record the lowest combined Caravan and Campervan registrations per 1,000 people at 8.1 in 2019.

POPULATION OVER OVER 65

CARAVAN AND CAMPERVAN REGISTRATIONS
PER 1,000 PEOPLE OVER 65 YEARS

Figure 5: Total Caravan and Campervan Registrations per 1,000 people 2018 v 2019



Tasmania has the highest population over 65 years and the highest number of combined Caravan and Campervan registrations at 40.7 vehicles per 1,000 people

- The line in Figure 5 above represents the portion of population in each state over 65 years, consolidated to a 1,000 person aggregate. The columns represent the number of Caravans and Campervans per 1,000 people. This Figure measures the correlation between the population over 65 years compared with the volume of registered recreational vehicles.
- The number of Campervan and Caravan registrations in the Northern Territory per 1,000 people remains quite low, which correlates to the relatively low portion of population over 65 years.
- Conversely, states such as South Australia and Tasmania with higher portions of population > 65 years have greater volumes of recreational vehicles relative to their population.
- States such Western Australia and Queensland have a relatively high saturation of recreational vehicles despite lower populations over 65 years, suggesting a correlation between age demographic and the presence of recreational vehicles may differ in significance between state to state.
- Caravans continue to be the most popular recreation vehicle, accounting for 90% of the recreational vehicles registered in Australia.

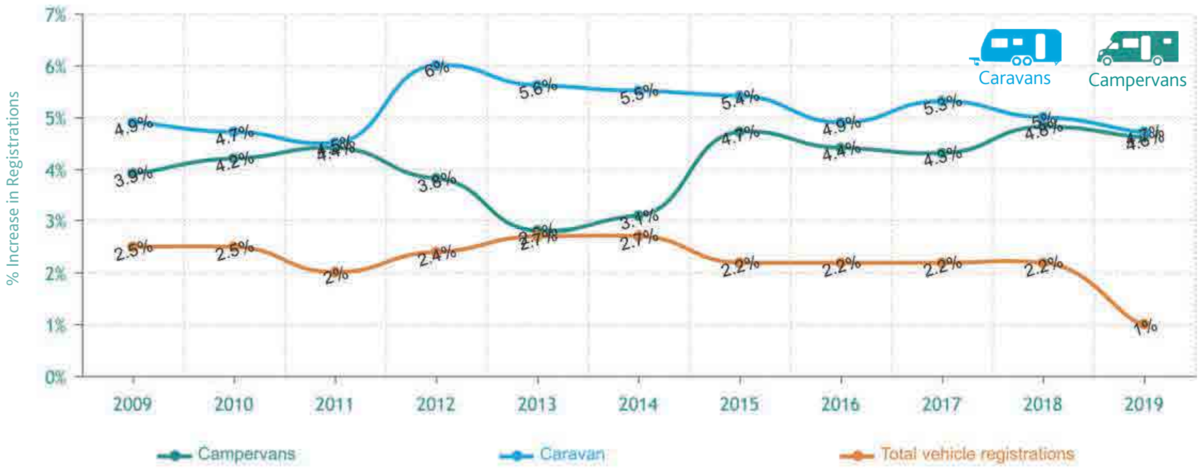
ANNUAL MOVEMENT

% CHANGE IN CARAVANS, CAMPERVANS AND TOTAL MOTOR VEHICLES

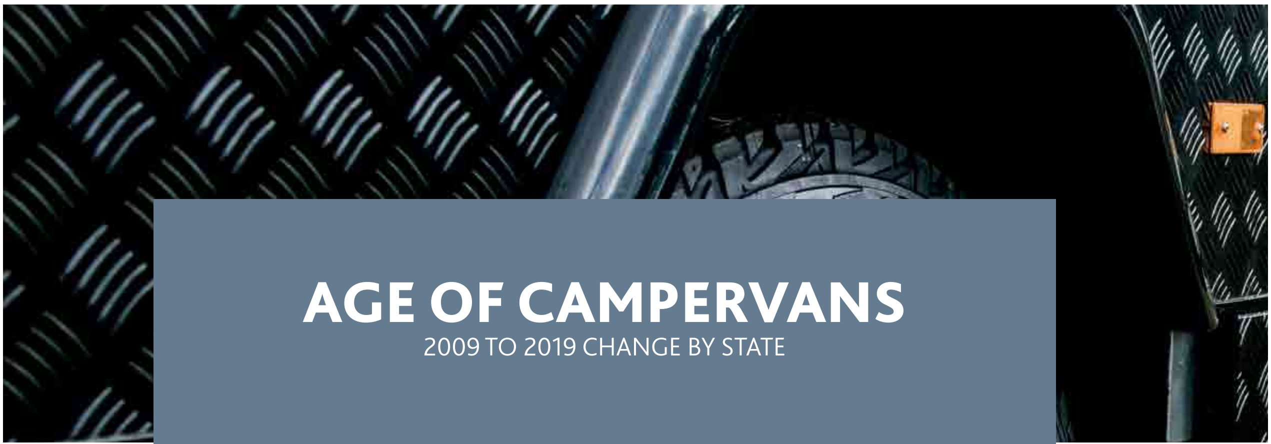
- While the total number of Caravans and Campervans in Australia has increased, the rate of increase slowed slightly during 2019 to 4.7% for Caravans and 4.6% for Campervans.
- The overall change in percentage terms for motor vehicles during 2019 was relatively stagnant, increasing by only 1%. Both Caravans and Campervans have out performed the percentage increase of total motor vehicles across all of the past 10 years, and most noticeably since 2015.
- In context, RV registrations increased by 2.5 times more than overall vehicle registrations in 2019, highlighting continuing strong demand for recreational vehicles.

Caravan and Campervan registration growth increased by 2.5 times overall vehicles in 2019

Figure 6: Annual % Movement in Registrations by Vehicle Type 2009 to 2019



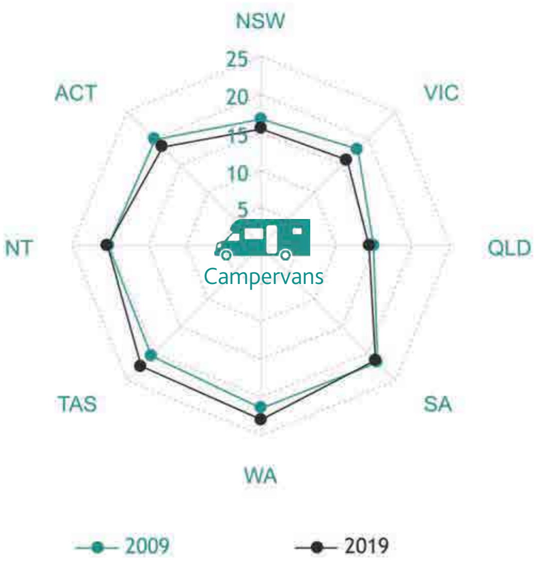
2019 CARAVAN AND CAMPERVAN DATA REPORT 11



AGE OF CAMPERVANS

2009 TO 2019 CHANGE BY STATE

Figure 7: Average Age of Campervans by State 2009 to 2019



STATE	CAMPERVANS AVG. AGE (YEARS)	
	2009	2019
NSW	16.7	15.4
VIC	18.0	16.0
QLD	14.8	14.2
SA	21.7	21.3
WA	21.4	22.9
TAS	20.5	22.4
NT	20.2	20.3
ACT	19.8	18.4
AUS	18.1	17.0

- The average age of Campervans in Australia continues to gradually decline (at 31 January 2019) from 17.1 years in 2018 to 17.0 years in 2019.
- While the average age of campervans is steadily declining, it is still significantly higher at 17.0 years compared with the overall age of all motor vehicles in Australia at 10.1 years.
- Figure 7 above identifies the change in average age over the past 10 years of Campervans by State. As can be seen, average age (years) in the ACT, NSW, VIC and QLD of Campervans has noticeably reduced, while in WA and TAS average age has increased.

Western Australia has the oldest Campervans on average at 22.9 years

AGE OF CAMPERVANS

NATIONAL TREND 2009 TO 2019

Figure 8: Average Age of Campervans National Trend 2009 to 2019

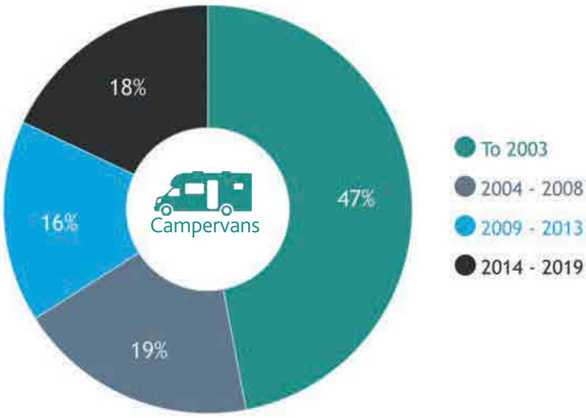
87% of all Campervans manufactured after 2014 reside in either NSW, VIC or QLD

- With the exception of WA and TAS, the average age of Campervans has declined over the past 10 years, with VIC reporting the largest average decrease of 2 years, from an average age of 18 years in 2009 to 16 years in 2019.
- Campervans manufactured before 2003 amounted to 47% of the population which has gradually increased from 46% in 2018, in line with an increase in the overall time period. This is still a reasonably significant portion of the overall population of campervans.
- Almost half the Campervan population is more than 16 years old, which is largely due to the higher average age of Campervans outside of the Eastern states
- While 73% of Campervans are registered in NSW, VIC and QLD, these states account for 87% of all Campervans manufactured between 2014 and 2019.

MANUFACTURE PERIOD

REGISTERED CAMPERVANS

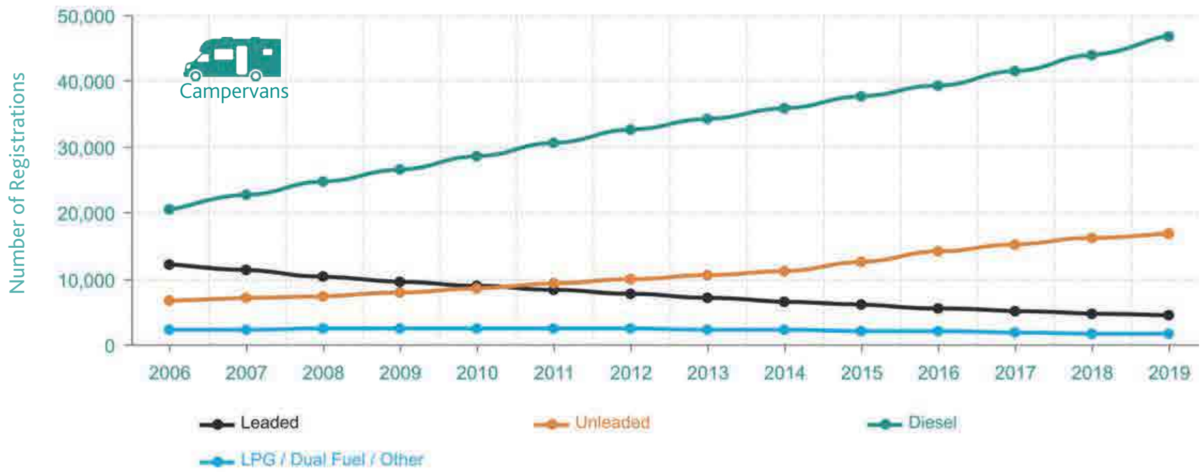
Figure 9: Registered Campervans % by Period of Manufacture

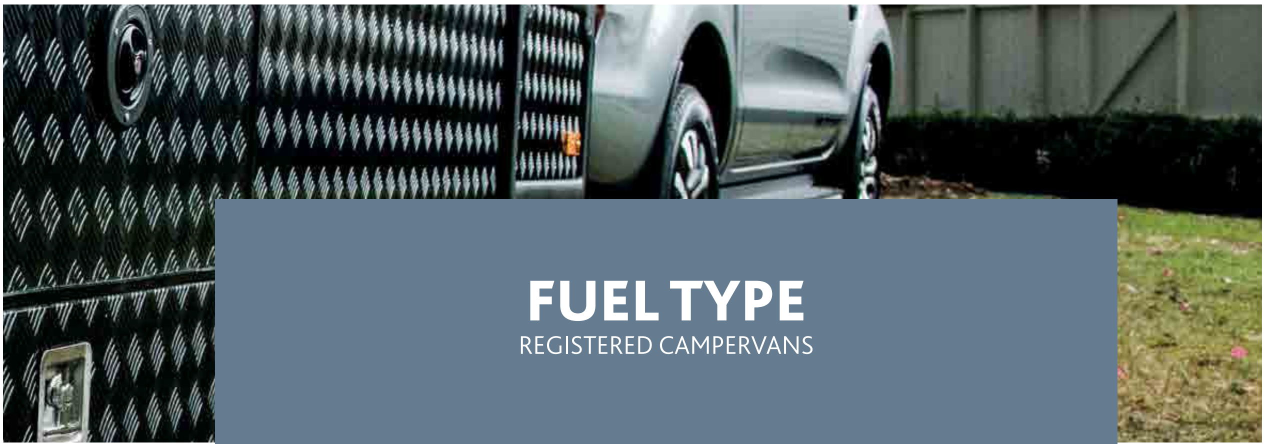


66% of Western Australia's Campervans were manufactured before 2003, with only 18% being manufactured in the past 10 years

This compares to Victoria where 40% of registered Campervans have been manufactured within the past 10 years

Figure 10: Campervan Registrations by Fuel Type 2006 to 2019





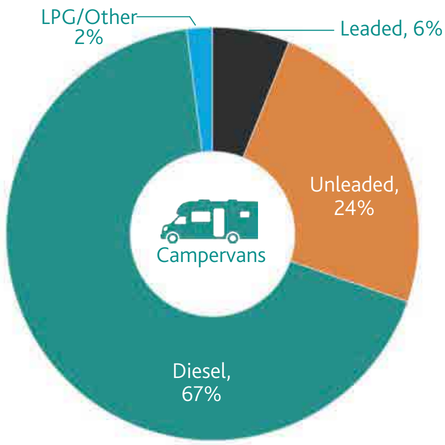
FUEL TYPE

REGISTERED CAMPERVANS

The number of Diesel Campervans has increased by 76% over the past 10 years (2009 to 2019) nationally to 46,860 vehicles

Over this same period, the number of Leaded Campervans has decreased by (53%) to 4,483 vehicles in 2009

Figure 11: Campervans by Fuel Type

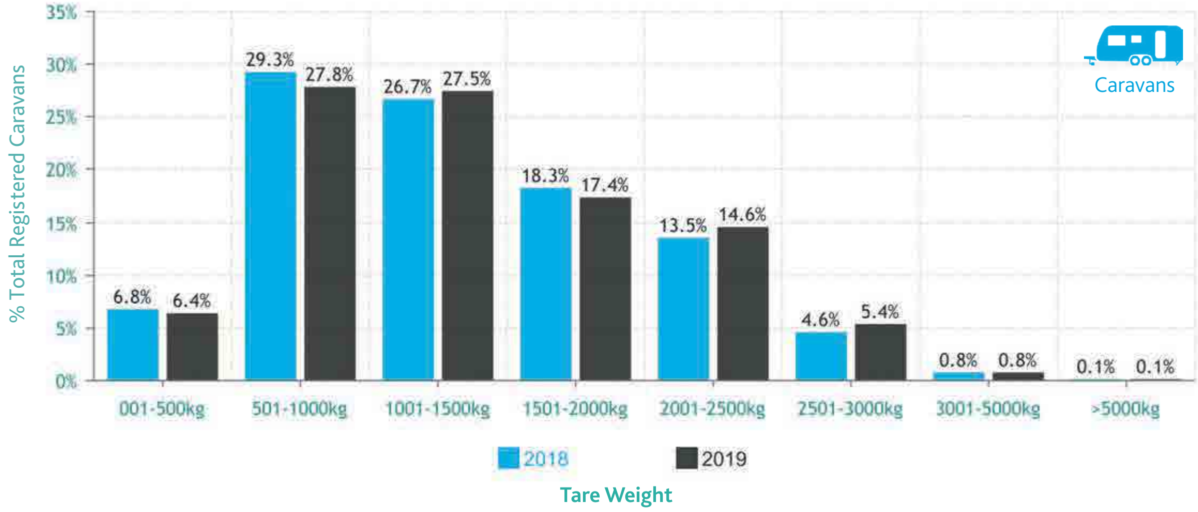


- Diesel continues to emerge as the most popular fuel type for Campervans with 67% of all registered Campervans using diesel. By way of comparison, in 2009, 57% of all registered Campervans were on diesel, representing a market share increase of 10% over the past 10 years compared with other fuel types.
- The fastest take-up of diesel is most common among new Campervans. In 2009, 26,557 Campervans were powered by diesel, whereas in 2019, 46,860 registered Campervans are now using diesel which represents a 76% increase in the number of registered vehicles on diesel over the past 10 years.
- This steady increase in popularity has been at the expense of leaded petrol with only 4,483 registered Campervans in 2019 using leaded petrol as their fuel type. This figure was as high as 9,595 Campervans in 2009 or 21% of all Campervans 10 years ago. Figure 10 on the previous page identifies the near lineal decline of leaded as a fuel type for Campervans, a trend which continued in 2019.
- While not a significant portion of total Campervans, the 'LPG/Other' fuel type has gradually decreased in popularity from 5% of total Campervans in 2009 to 2% in 2019, we suggest most influenced by the reduction in use of LPG as a vehicle fuel type.

WEIGHT CLASS

CARAVANS

Figure 12: Caravan % Population by Weight Class



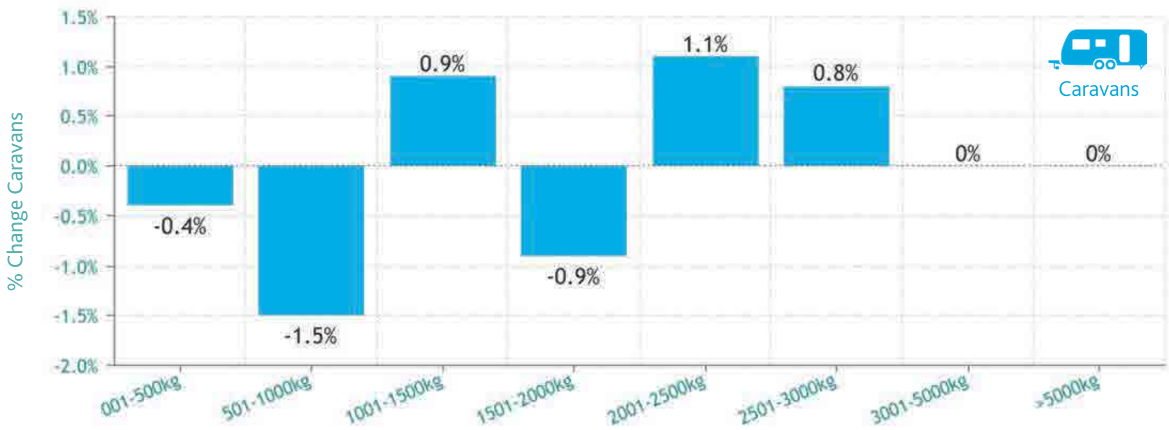
Caravans are getting heavier with those weighing over 2 tonnes growing by 1.9% in 2019

- The figure above identifies the percentage of registered Caravans by weight distribution. A majority of Caravans (55.4%) are between 500kg to 1.5 tonnes.
- During 2019 the category 1 to 1.5 tonnes became the most popular, with 27.5% of all Caravans in this Category. In contrast, during 2018 the 500kg to 1 tonne category represented the largest number of Caravans last year, at 29.3%.
- Growth in the overall number of Caravans continues to be in the higher weight ranges, with the largest increase (1.1%) during 2019 occurring in the 2-2.5 tonne range.
- Lighter Caravans between 501kg - 1 tonne experienced the greatest decline of (1.5%) as a percentage of total caravans during 2019.
- In 2019, for the first time in 5 years there was a slightly decline in the quantity of Caravans registered in the 1.5-2 tonne weight range of (0.9%). With the exception of this result, the overall trend is towards heavier Caravan product.

WEIGHT CLASS MOVEMENT

CARAVANS

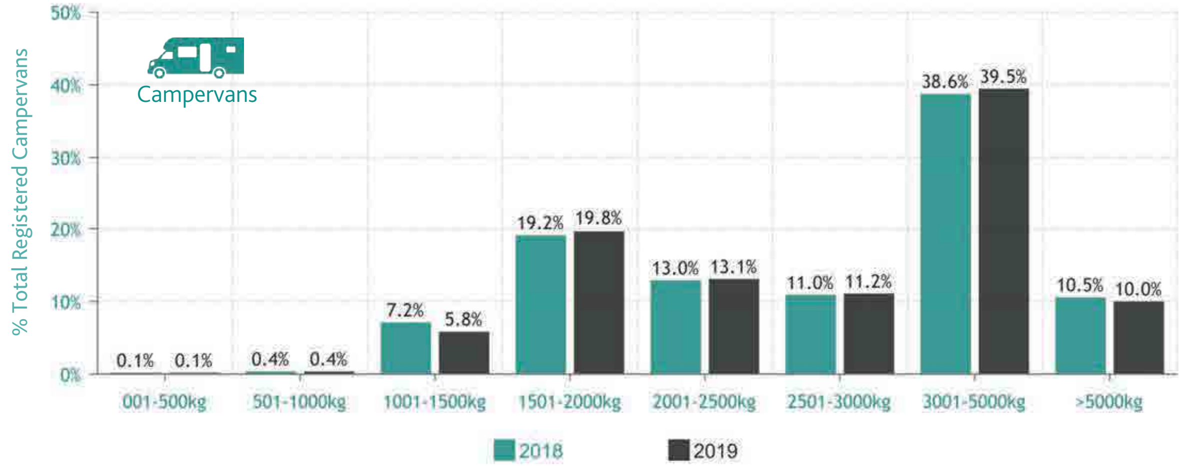
Figure 13: Caravan Population % Change in Weight Distribution from 2018 to 2019



WEIGHT CLASS

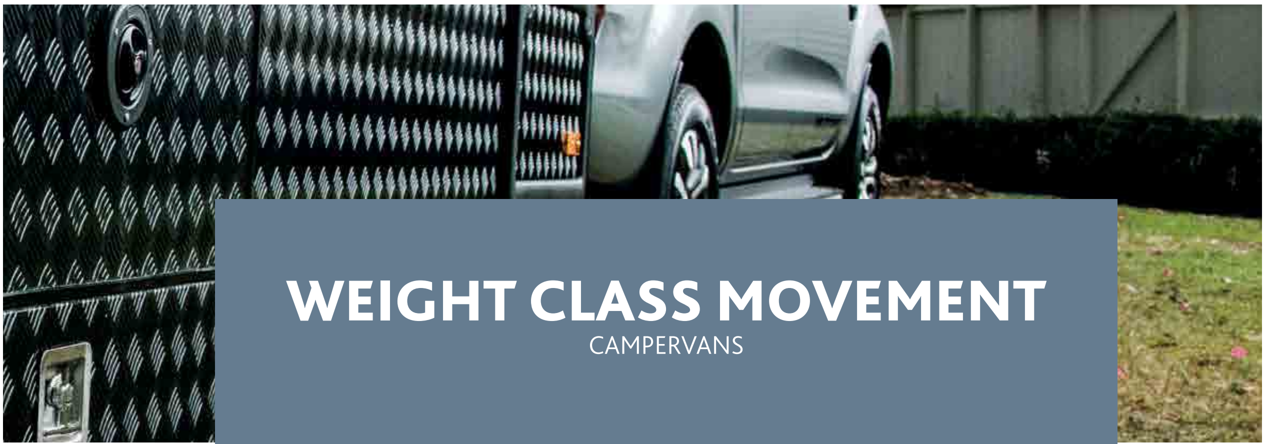
CAMPERVANS

Figure 14: Campervan % Population by Weight Class



39.5% of Campervans weigh between 3 to 5 tonnes, the fastest growing weight class in both 2018 and 2019

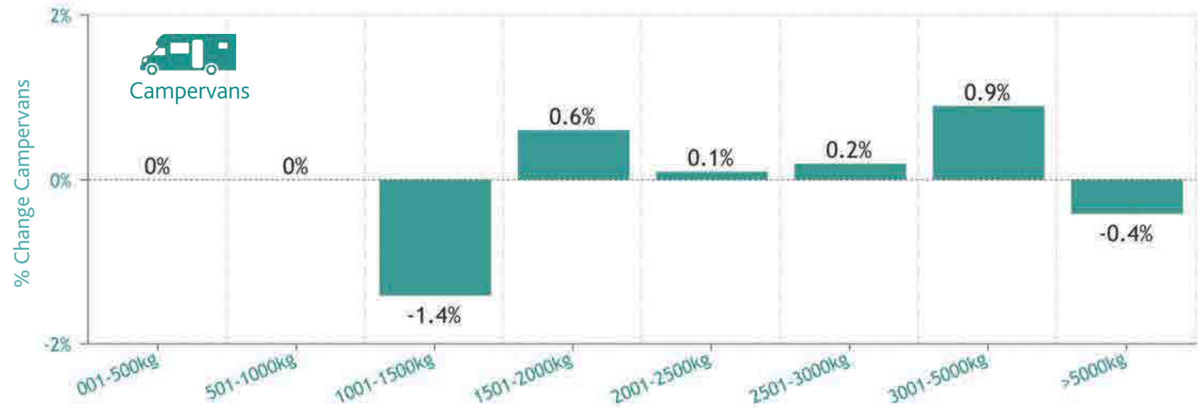
- Figure 14 above identifies the distribution of weight class among all registered Campervans. The 3-5 tonne category represents the largest weight classification, accounting for 39.5% of all registered Campervans.
- While 3 - 5 tonnes represent the largest weight class in terms of number of registered Campervans, it is also the largest weight span of 2 tonnes, which is not equal to other classes that increase by 500kg brackets up to 3 tonnes. These weight classes are supplied directly by the Australian Bureau of Statistics and do not include an option for an equally distributed weight class range.
- Comparing 2019 with 2018, the largest movement was a decrease of 1.4% in the number of Campervans weighing between 1 - 1.5 tonnes. There was similarly a decrease in the >5 tonne weight class, suggesting substantially small and substantially large Campervans are decreasing in popularity in preference to mid-sized Campervans across the 1.5 - 5 tonne spectrum.

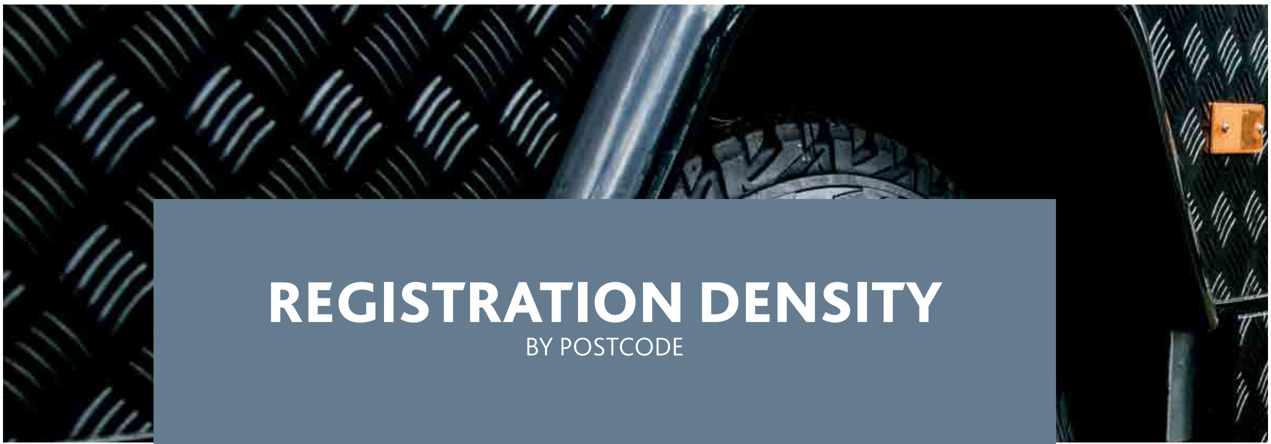


WEIGHT CLASS MOVEMENT

CAMPERVANS

Figure 15: Campervan Population % Change in Weight Distribution from 2018 to 2019

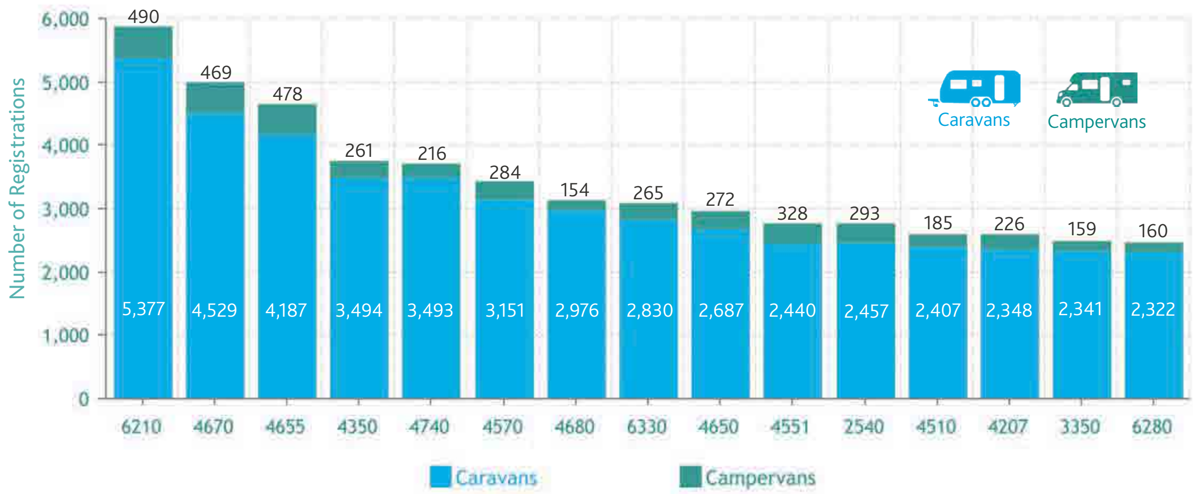




REGISTRATION DENSITY

BY POSTCODE

Figure 16 Registration Density by Top 15 Postcodes in 2019



Mandurah (postcode 6210) continues to have the most registered recreational vehicles, growing by 3.7% in 2019

- Figure 16 above identifies the top 15 postcodes based on the number of recreational vehicle registrations in 2019.
- Of all postcodes in Australia, Mandurah, Western Australia (located 73 kms South of Perth, 6210) continues to have the highest number of combined Caravan and Campervan registrations recorded at 5,867, up 209 from 2018. This represents a 4% increase in Mandurah from last year.
- The second highest postcode for Caravan and Campervan registrations was in Bundaberg, Queensland (located 362 Kms North of Brisbane,4670) with a total of 4,529 Caravans and 469 Campervans. This postcode added an additional 212 recreational vehicles, which represents a 4.4% increase in 2019, following steady increases of over 4% in 3 out of the past 4 years for Bundaberg.

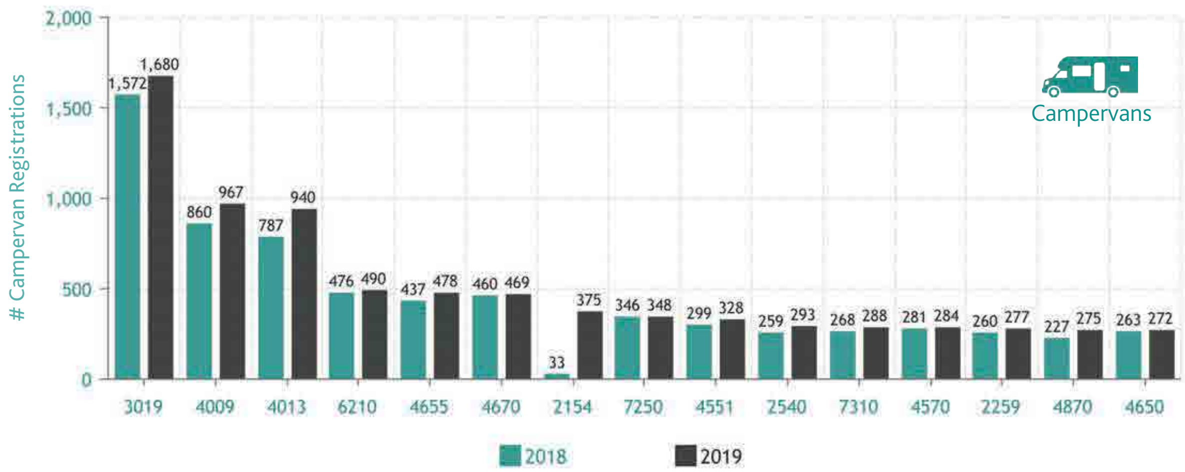
REGISTRATION DENSITY

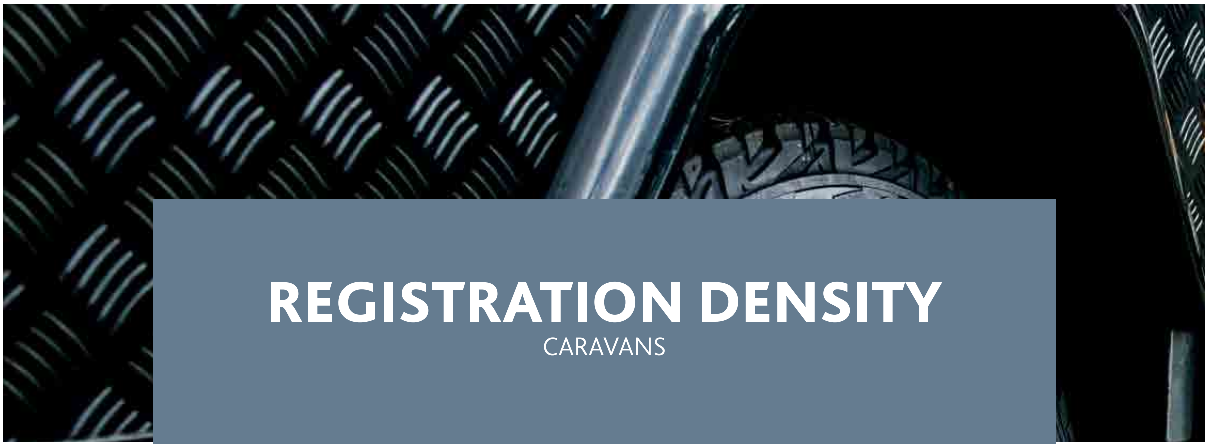
CAMPERVANS

- Postcode 3019 is Braybrook in Victoria and continues to represent the postcode with the largest number of registered Campervans, increasing by 108 in 2019 to 1,680. There are a number of RV hire companies trading in this area, which may influence the result.
- After Postcode 3019 there is a fairly significant decrease to the next largest postcode in terms of registered Caravans with 4009 (Eagle Farm in QLD) recording 967 registrations in 2019, up from 860 in 2018.
- Postcode 2154 is Castle Hill, located around 50 minutes drive north west of Sydney and represents the postcode with the greatest increase Campervans of 342 vehicles in 2019. We suggest this significant change from 33 registered Campervans in 2018 is the result of underlying commercial activity in the area (new or changing business activity).

The postcode of Braybrook in Victoria continues to have the most Campervans, increasing by 6.9% to 1,680 in 2019

Figure 17 Campervan Registration Density by Top 15 Postcodes 2018 v 2019





REGISTRATION DENSITY

CARAVANS

Figure 18 Registration Density by Top 15 Postcodes in 2019

10 of the top 15 postcodes for registered Caravans by are in Queensland

- While Mandurah (postcode 6210) has the highest number of registered Caravans, Bundaberg in QLD (postcode 4670), experienced the greatest increase of 203 during 2019, bringing total registered Caravans in Bundaberg to 4,529.
- Both Mandurah and Bundaberg continue to be the largest postcodes as well as the fastest growing with Mandurah representing the second fastest growing postcode with 195 new registrations in 2019.
- Conversely, postcodes 2641 near Albury in NSW and 4133, Logan Reserve in QLD both experienced declines of 19 registered Caravans compared with 2018, bringing total Caravans in these areas down to 566 and 544 respectively.

EXTRACT OF ABS DATA

	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS	PERCENTAGE OF CLASS TO TOTAL
Campervans	14,101	17,421	19,778	7,816	4,890	5,030	19,778	206	69,693	9.8%
Caravans	157,880	171,197	147,370	90,078	51,792	16,666	4,895	1,766	641,644	90.2%
Total 2019	171,981	188,618	167,148	97,894	56,682	21,696	5,346	1,972	711,337	
Campervans	13,543	16,703	18,458	7,871	4,416	4,915	461	244	66,611	9.8%
Caravans	150,990	163,389	139,240	86,866	50,294	15,583	4,714	1,691	612,767	90.2%
Total 2018	164,533	180,092	157,698	94,737	54,710	20,498	5,175	1,935	679,378	

% OF THE TOTAL POPULATION - 2019	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
Campervans	20.2%	25.0%	28.4%	11.2%	7.0%	7.2%	0.6%	0.3%	100.0%
Caravans	24.6%	26.7%	23.0%	14.0%	8.1%	2.6%	0.8%	0.3%	100.0%
Total	24.2%	26.5%	23.5%	13.8%	8.0%	3.1%	0.8%	0.3%	100.0%

% INCREASE/(DECREASE) 2018 V 2019	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
Increase/(decrease) in Campervan registrations	4.1%	4.3%	7.2%	-0.7%	10.7%	2.3%	-2.2%	-15.6%	4.6%
Increase/(decrease) in Caravan registrations	4.6%	4.8%	5.8%	3.7%	3.0%	7.0%	3.8%	4.4%	4.7%
Increase/(decrease) in Total registrations	4.5%	4.7%	6.0%	3.3%	3.6%	5.8%	3.3%	1.9%	4.7%

MARKET SHARE OF INCREASE 2018 V 2019	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
Increase/(decrease) in Campervan registrations	18.1%	23.3%	42.8%	-1.8%	15.4%	3.7%	-0.3%	-1.2%	100.0%
Increase/(decrease) in Caravan registrations	23.9%	27.0%	28.2%	11.1%	5.2%	3.8%	0.6%	0.3%	100.0%
Increase/(decrease) in Total registrations	23.3%	26.7%	29.6%	9.9%	6.2%	3.7%	0.5%	0.1%	100.0%

INCREASE/(DECREASE) 2018 V 2019	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
Increase/(decrease) in Campervan registrations	558	718	1,320	-55	474	115	-10	-38	3,082
Increase/(decrease) in Caravan registrations	6,890	7,808	8,130	3,212	1,498	1,083	181	75	28,877
Increase/(decrease) in Total registrations	7,448	8,526	9,450	3,157	1,972	1,198	171	37	31,959

Source: ABS Catalogue 9309.0; Motor Vehicle Census

EXTRACT OF ABS DATA

Campervan and Caravan Registrations per 1,000 People

	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
Population 2019 ('000)	6,566	5,076	8,071	2,615	1,748	533	425	245	25,279
Population 2018 ('000)	6,429	4,990	7,956	2,591	1,733	526	419	246	24,890
Population 2017 ('000)	6,179	4,848	7,739	2,558	1,713	517	403	245	24,202

2019 REGISTERED VEHICLES PER 1,000 PEOPLE	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
2019 Campervans per 1,000 people	2.2	3.4	2.5	3.0	2.8	9.4	1.1	0.8	2.8
2019 Caravans per 1,000 people	24.1	33.7	18.3	34.5	29.6	31.3	11.5	7.2	25.4
Total Campervan and Caravans per 1,000	26.2	37.2	20.7	37.4	32.4	40.7	12.6	8.1	28.1
Population >65 years old per 1,000 people	146	146	155	138	178	189	121	72	150
% of population >65 years old	14.6%	14.6%	15.5%	13.8%	17.8%	18.9%	12.1%	7.3%	15.0%

2018 REGISTERED VEHICLES PER 1,000 PEOPLE	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
2018 Campervans per 1,000 people	2.1	3.4	2.3	3.0	2.6	9.3	1.1	1.0	2.7
2018 Caravans per 1,000 people	23.5	32.7	17.5	33.5	29.0	29.6	11.3	6.9	24.6
Total Campervan and Caravans per 1,000	25.6	36.1	19.8	36.6	31.6	39.0	12.4	7.9	27.3

2019 INCREASE/DECREASE FROM 2018	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
2019 Campervans per 1,000 people	0.0	0.1	0.1	-0.1	0.3	0.1	0.0	-0.2	0.1
2019 Caravans per 1,000 people	0.6	1.0	0.8	0.9	0.6	1.6	0.3	0.3	0.8
Total Increase/Decrease per 1,000	0.6	1.1	0.9	0.9	0.9	1.7	0.2	0.2	0.8

TOTAL MOTOR VEHICLE REGISTRATIONS	VIC	QLD	NSW	WA	SA	TAS	ACT	NT	AUS
2019 (inc. Caravans)	5,073,355	4,208,820	5,758,252	2,318,308	1,459,270	496,550	307,291	164,217	19,786,063
Caravans and Campervans as a % of total registrations	3.4%	4.5%	2.9%	4.2%	3.9%	4.4%	1.7%	1.2%	3.6%

Source: ABS Catalogue 9309.0; Motor Vehicle Census

APPENDIX 2.1 DOMESTIC QUARTER UPDATE – JUNE 2019

Caravan Industry Association of Australia

Domestic Tourism Snapshot

Analysis of Australia's Domestic Caravan and Camping Market	Y/E June 2019

Total Nights		Total Trips	
55,245,677	4.9% +/- YOY	13,357,880	7.8% +/- YOY

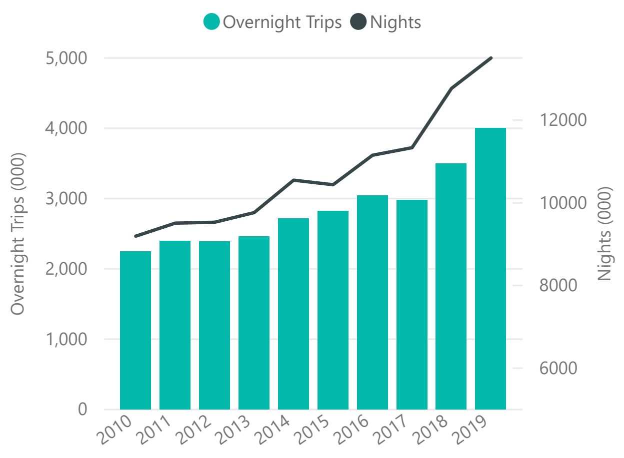
Caravan and Camping Visitor Economy Performance

Australia's domestic caravan and camping visitor economy continued a solid performance through June 2019 with a rolling annual increase of 7.8% in trips to break through 13 million domestic trips for the first time. Nights also increased to a record high, reaching 55.2M, a 4.9% annual increase.

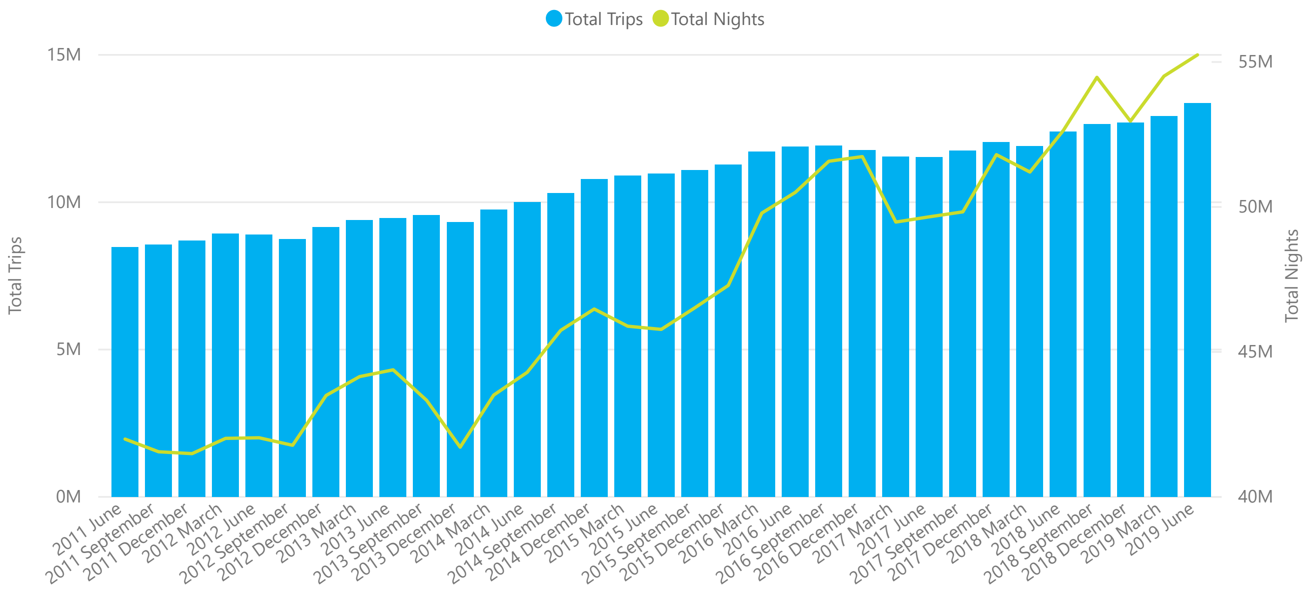
The June quarter proved to be the best performing June quarter for a decade, in part because the entire Easter weekend fell in April, with the proximity of ANZAC day offering extended holiday opportunities. The June quarter saw growth of 14% in terms of trips and a 5.7% increase in nights.

Despite these increases, all figures should continue to be taken with a grain of salt as the impact of TRA's change in methodology continues to provide inflated figures across domestic tourism which saw growth of 10% by nights and 12% by trips accross all accommodation types.

Total Nights and Visitors in the June Quarter



Domestic Caravan and Camping Total Nights and Overnight Trips by Rolling Annual



Data Source: Tourism Research Australia, NVS, 2019

Working collaboratively with member State Associations on research that benefits the Caravan and Camping Industry

Caravan Industry Association of Australia

Y/E June 2019 — Domestic Snapshot

Data Source: Tourism Research Australia, NVS, 2019

State and Territory Analysis (Rolling Annual)

Summation Options: State/Territory	Nights Total	Nights Growth YOY	Overnight Trips Total	Overnight Trips Growth YOY
New South Wales	17,408,015	6.0%	4,437,176	4.3%
Northern Territory	1,782,707	-11.2%	399,233	21.7%
Queensland	12,184,151	4.8%	2,690,722	10.9%
South Australia	5,329,722	30.9%	1,301,654	22.7%
Tasmania	1,492,654	6.0%	407,115	18.3%
Victoria	10,453,842	4.8%	3,478,347	14.2%
Western Australia	6,413,925	-4.5%	1,516,510	0.7%

State and Territory Visitor Economy Performance

All states recorded growth in overnight caravan and camping trips, with South Australia and Northern Territory leading the way with growth of 23% and 22% respectively. Nights showed more mixed results with Western Australia and Northern Territory seeing negative growth, however this is predominately due to the continued challenges around length of stay which more severely impacts on regions further away from large population hubs (the eastern sea board).

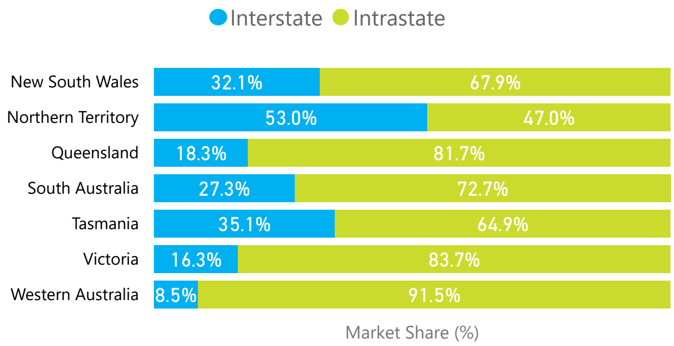
By marketshare, there continues to be consistent increases from South Australia, which now features in 9.1% of domestic caravan and camping trips (up from 8.2% in 2018). Victoria also gained 0.9ppt to capture 24.4% of caravan and camping trips, boosted by a continually strong intrastate market. These increases in marketshare were at the expense of NSW and Western Australia who experienced percentage points declines of 1.6 and 0.9 respectively. The decline in market share of NSW is partially due to a strong resurgnece of Queensland who experienced 11% growth in real terms of trips which led to a market share of 18.9%, the highest since 2016 and highlighting the immense recovery effort of the sector since Cyclone Debbie in 2017. Despite the inroads made by other states, NSW continue to have the largest marketshare with 31% of caravan and camping trips featuring NSW.

As a result of Easter falling entirely in the June quarter this year, the proportion of trips taken in the quarter was higher than previous years, especially in the cooler southern states with Tasmania and Victoria recording increases in the proportion of trips taken in the June quarter.

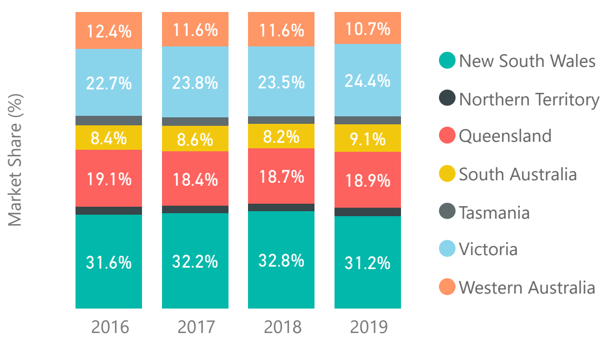
State Seasonality Trends (Total Trips and Percentage of Overnight Trips per Quarter)

Quarter	September 2018		December 2018		March 2019		June 2019	
State/Territory	Trips (000)	Total %	Trips (000)	Total %	Trips (000)	Total %	Trips (000)	Total %
New South Wales	872	20%	1,046	24%	1,215	27%	1,305	29%
Northern Territory	149	37%	90	22%	21	5%	139	35%
Queensland	772	29%	651	24%	566	21%	702	26%
South Australia	264	20%	339	26%	386	30%	313	24%
Tasmania	72	18%	71	17%	180	44%	85	21%
Victoria	511	15%	834	24%	1,129	32%	1,005	29%
Western Australia	339	22%	312	21%	432	28%	433	29%

Origin of Caravan and Camping Visitors



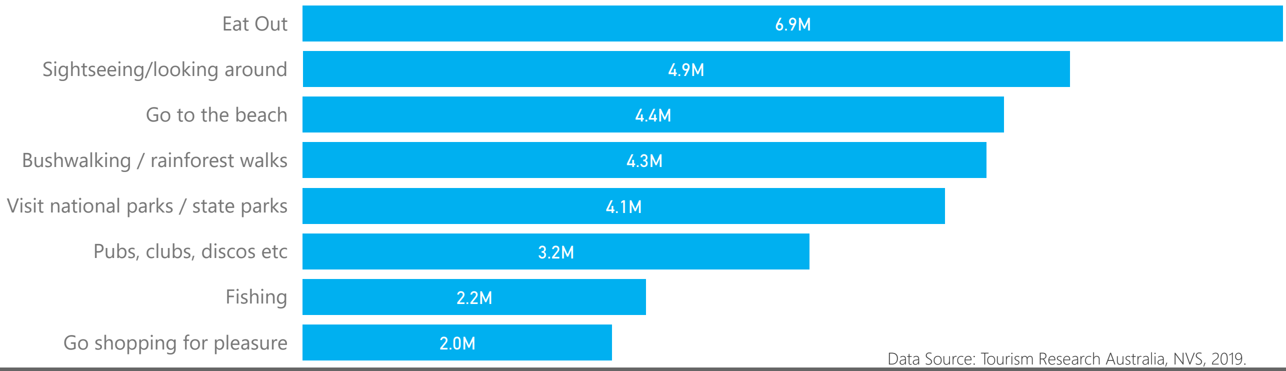
Overnight Trips by State: Rolling Annual (Market Share)



Caravan Industry Association of Australia

Y/E June 2019 Domestic Snapshot

Domestic Caravan and Camping Top 8 Activities (Overnight Trips)



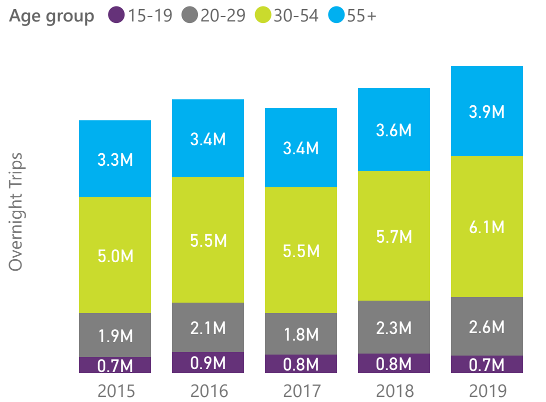
Data Source: Tourism Research Australia, NVS, 2019.

Caravan and Camping Visitor Demographics

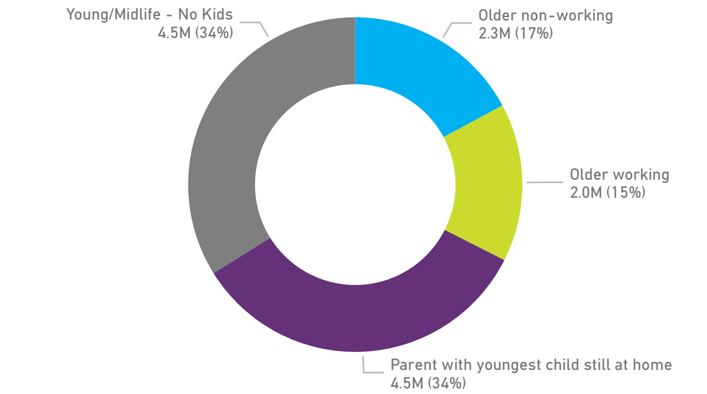
For the year-ending June 2019, 6.9M caravan and camping trips involved eating out at a cafe or restaurant, again making it the most popular activity. The remaining 4 of the top 5 most popular activites for visitors are nature-based, highlighting the continued role these attractions play in visitor experiences.

By lifecyle group, the 'Young/Midlife - No Kids' overtook the family demographic to become the largest trips takers by lifecycle group. This group is fuelled by the rapidly increasing 20-29 year brackets who are taking caravan and camping trips. The 30-54 group also strongly increased in the number of trips taken to surpass 6M, 46% of all trips. The older demographic continues to highlight their importance with the number of nights spent caravan and camping. The older non-working segment spent 17M nights in total, accounting for 31% of all nights spent caravan and camping.

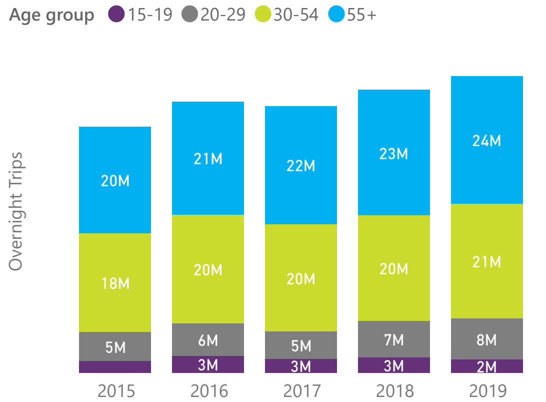
Domestic Caravan and Camping Trips (Age)



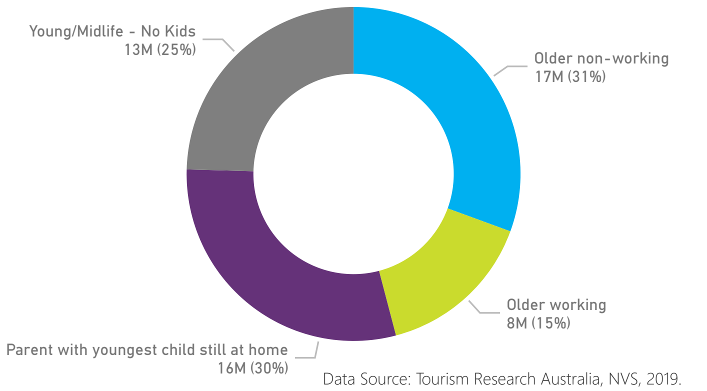
Domestic Caravan and Camping Trips (Lifecycle Groups)



Domestic Caravan and Camping Nights (Age)



Domestic Caravan and Camping Nights (Lifecycle Groups)

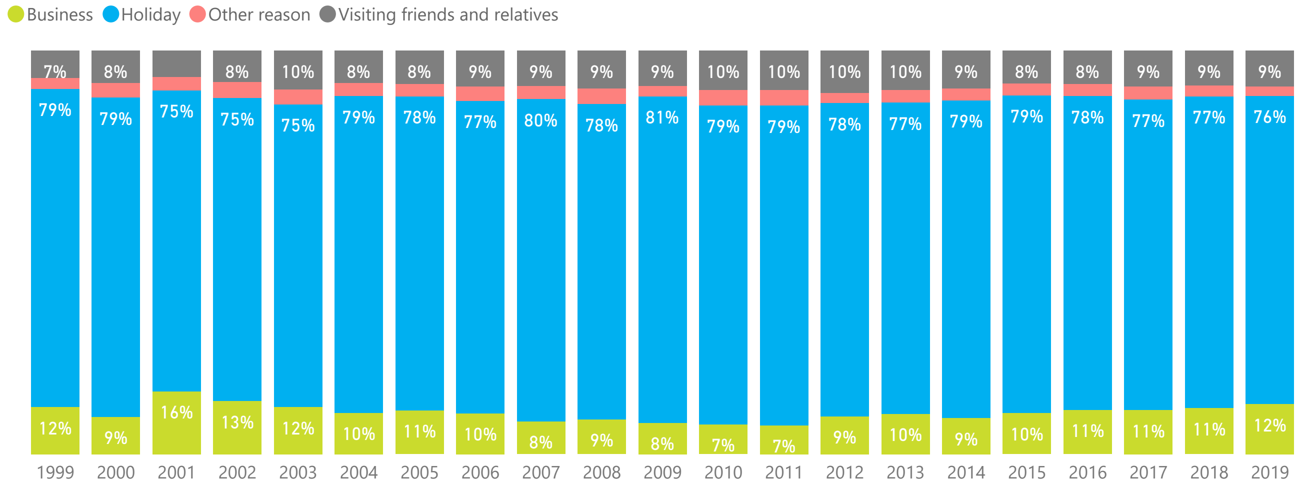


Data Source: Tourism Research Australia, NVS, 2019.

Caravan Industry Association of Australia

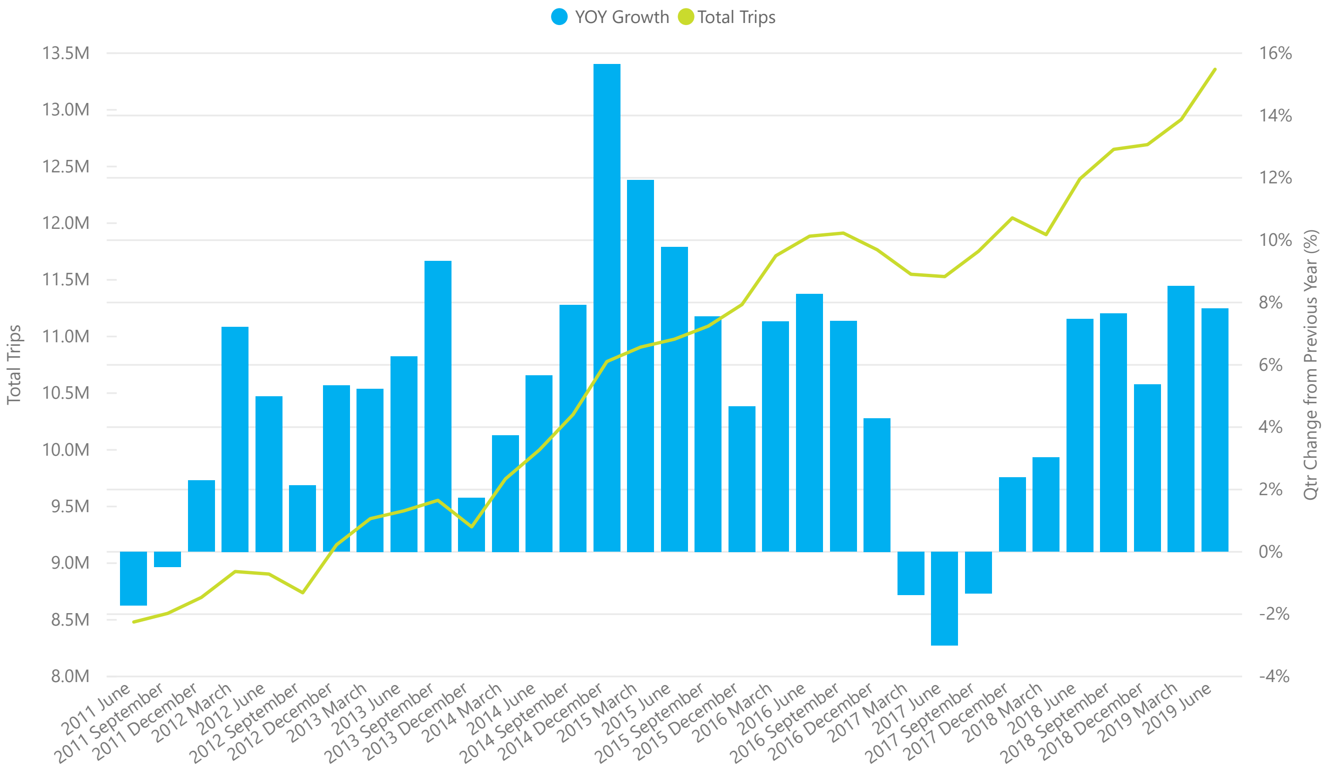
Y/E June 2019 Domestic Snapshot

Reason for Travel by Caravan and Camping Overnight Trips



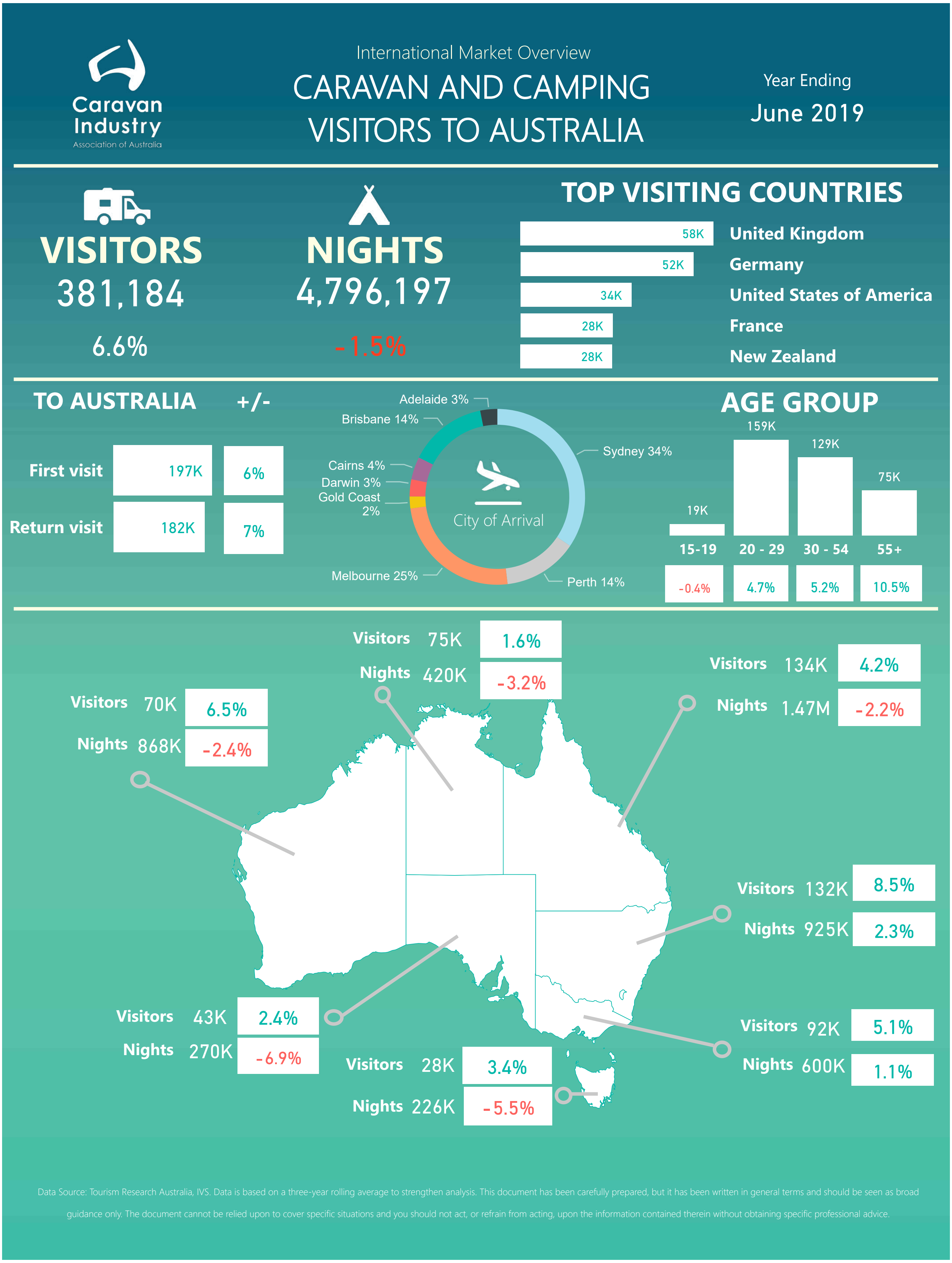
Data Source: Tourism Research Australia, NVS, 2019.

Domestic Caravan and Camping Visitor Trips (Rolling Annual) and Qtr Percentage Change on Previous Year



Data Source: Tourism Research Australia, NVS, 2019.

APPENDIX 2.2 INTERNATIONAL QUARTER UPDATE – JUNE 2019



APPENDIX 3:
Field trip ideas & scoring

ASSESSMENT OF PRELIMINARY HIGH-LEVEL IDEAS

TABLE B – 1 ASSESSMENT OF FOOD BOWL THEMED IDEAS

IDEAS PROPOSED BY FIELD TRIP GROUP TO DELIVER FOOD BOWL THEME	MATCH TO REIMAGINING FOODBOWL THEME	MATCH TO TAS BRAND ESSENCE TO FEEL MORE HUMAN, TO BE TASMANIAN (KNOWLEDGEABLE, CULTURE, CLEAR, COMPOSED, NURTURING, SENSITIVE, HONEST, REAL	MATCH TO NW BRAND ATTRIBUTES (BRUTAL AGAINST BEAUTY - DISARMING, OFFBEAT, ORIGINAL SEDUCTIVE	MATCH TO TAS TARGET MARKET ERUDITES (LEARNING, CHALLENGING, STEP BACK & REFLECT, REFRESH & RENEW)	MATCH TO TAS TARGET MARKET RAW URBANITES (ESCAPE, BACK TO BASICS, RECONNECT WITH SELF, NATURE & OTHERS)	DIFFERENTIATION WITHIN TAS	WOW FACTOR	TOTAL SCORE	LEVERAGE SCORE (LOCATED NEAR ACCOM & F&B, IDEALLY A CLUSTER)
Behind the scenes factory tours, including traditional and high-tech dairy operations	4	2	2	4	2	2	1	17	5
Fishing experiences from the historic ports of Stanley and Wynyard (eg. 'Fresh off the boat' tastings and sales	4	3	3	3	3	3	2	21	5
Fishing experiences from the historic ports of Stanley and Wynyard (eg. fishing tours / charters or commercial fishing tag along	4	4	4	4	5	4	4	29	5
Activate Highfield House (and other relevant event spaces) for food events e.g. regular produce markets, a winter colonial feast	4	3	3	3	3	4	3	23	5
Transform Table Cape into a 'must stop' hub (eg. cantilever lookout, 'Loo with a view', augmented reality app / observatory building interpreting tulip fields in bloom)	3	3	4	3	3	5	4	25	4
More innovative and immersive farm-gate experiences (not just tastings)	4	4	3	3	4	3	2	23	3
More high-end food offerings across the region e.g. restaurants, cooking classes, producers' luncheons	4	4	4	4	3	3	2	24	4
A 'signature dish' / local flavours program to encourage hospitality venues to sign up to deliver on the brand promise	3	3	4	3	3	2	2	20	4
Encourage food and coffee vans / pop-ups to set up at scenic stops that do not have a permanent food and beverage operator	2	2	2	2	1	1	1	11	3
High-end accommodation options: boutique hotels with food offerings; self-contained retreats, especially in and around Stanley	3	4	3	3	2	3	2	20	4
Farm-stays and farm-shed accommodation / 'tin shed hideaways' converting disused sheds to diversify farm incomes, or as a social enterprise	3	4	4	4	4	3	3	25	3
Install signage to name the crops being grown in the fields along driving routes	3	2	2	3	3	3	1	17	1
'Instagrammable moments' in agricultural settings: eg. new lookouts over farmland; secure public access to a piece of paddock	3	2	2	2	2	2	1	14	1

TABLE B – 2 ASSESSMENT OF RAW AND WILD THEMED IDEAS

IDEAS PROPOSED BY FIELD TRIP GROUP TO DELIVER RAW & WILD THEME	MATCH TO REIMAGINING RAW & WILD THEME	MATCH TO TAS BRAND ESSENCE TO FEEL MORE HUMAN, TO BE TASMANIAN (KNOWLEDGEABLE, CULTURE, CLEAR, COMPOSED, NURTURING, SENSITIVE, HONEST, REAL	MATCH TO NW BRAND ATTRIBUTES (BRUTAL AGAINST BEAUTY - DISARMING, OFFBEAT, ORIGINAL SEDUCTIVE	MATCH TO TAS TARGET MARKET ERUDITES (LEARNING, CHALLENGING, STEP BACK & REFLECT, REFRESH & RENEW)	MATCH TO TAS TARGET MARKET RAW URBANITES (ESCAPE, BACK TO BASICS, RECONNECT WITH SELF, NATURE & OTHERS)	DIFFERENTIATION WITHIN TAS	WOW FACTOR	TOTAL SCORE
Experience/s associated with the Robbins Island wagyu cattle muster, e.g. horse-riding the muster route, a mock muster re-enactment, or ways to view or join the actual muster	5	5	4	4	4	5	5	32
An upgrade and diversification of activities at Dismal Swamp - Refurbish existing infrastructure: slide, pathways, interpretation, amenities, mountain bike trails	2	2	2	2	2	3	2	15
An upgrade and diversification of activities at Dismal Swamp - new adventure activities, e.g. high ropes course, rope ladders, nets, 'cave drop' into the sinkhole, controlled descent 'jump', walk the plank, abseiling	3	3	4	4	4	3	3	24
An upgrade and diversification of activities at Dismal Swamp - Improve food and beverage offering	1	1	2	1	1	1	1	8
An upgrade and diversification of activities at Dismal Swamp - On-site accommodation	3	3	3	4	4	4	3	24
An upgrade and diversification of activities at Dismal Swamp - Develop business events packages	1	2	2	2	2	3	3	15
Retro-cool shack accommodation 'the way we used to holiday'; utilize existing shack infrastructure, employing locals to coordinate booking systems, housekeeping and experiences	4	4	3	3	4	3	3	24
An improved package of assisted exploration at Corinna - dinghies (e.g. using low horse-power electric motors); and/or other small boating options for hire alongside the existing canoe/kayaks inventory	3	3	3	4	4	3	2	22
An improved package of assisted exploration at Corinna - an experience / improve interpretation around the burrowing lobster	3	3	4	3	3	4	2	22
An improved package of assisted exploration at Corinna - Implement activity schedule with dedicated guides	3	3	3	3	3	3	2	20
An improved package of assisted exploration at Corinna - Improve packaging of activities / multi-night stays: cruise and vehicle pick up/drop off connections for walks and canoeing	1	2	2	2	2	2	1	12

IDEAS PROPOSED BY FIELD TRIP GROUP TO DELIVER RAW & WILD THEME	MATCH TO REIMAGINING RAW & WILD THEME	MATCH TO TAS BRAND ESSENCE TO FEEL MORE HUMAN, TO BE TASMANIAN (KNOWLEDGEABLE, CULTURE, CLEAR, COMPOSED, NURTURING, SENSITIVE, HONEST, REAL	MATCH TO NW BRAND ATTRIBUTES (BRUTAL AGAINST BEAUTY - DISARMING, OFFBEAT, ORIGINAL SEDUCTIVE	MATCH TO TAS TARGET MARKET ERUDITES (LEARNING, CHALLENGING, STEP BACK & REFLECT, REFRESH & RENEW)	MATCH TO TAS TARGET MARKET RAW URBANITES (ESCAPE, BACK TO BASICS, RECONNECT WITH SELF, NATURE & OTHERS)	DIFFERENTIATION WITHIN TAS	WOW FACTOR	TOTAL SCORE
An improved package of assisted exploration at Corinna - Refurbish building interiors	1	3	3	3	3	3	2	18
Improve storytelling / the experience of the Tarkine Drive for self-drive touring visitors - Add theatre to the experience and embed conservation lessons in forest encounters e.g. boot cleaning stations at the start of short walks	2	3	2	2	2	2	2	15
Improve storytelling / the experience of the Tarkine Drive for self-drive touring visitors - Create a specific experience of 'touching the forest' as a stop on the Tarkine Drive	3	3	3	3	3	3	2	20
Pack rafting and/or drift rafting and guided canoe/kayak trips on the Arthur River (Grade 2)	5	3	3	4	4	3	3	25
Provide encounters with wildlife in the Tarkine - Re-establish King's Run style wildlife tours	5	3	3	3	3	4	3	24
Provide encounters with wildlife in the Tarkine - Set up a small Tasmanian Devil / wildlife sanctuary (e.g. as an outpost of an existing Cradle Coast wildlife park/ sanctuary)	3	2	2	2	2	2	2	15
Provide encounters with wildlife in the Tarkine - Opportunities to participate in conservation / scientific expeditions, e.g. participate in collecting data on the healthy Tasmanian devil populations	4	3	3	3	3	3	3	22
Provide encounters with wildlife in the Tarkine - o Install signage / interpretation e.g. Lobster Crossing, Platypus Crossing; Tasmanian Tiger spotted here [date]	2	2	2	2	2	3	1	14
Enhance the reputation of Marrawah as a surf outpost and 'must do' coastal stop - Invest in improved public facilities / amenities and interpretation that tell the story	2	2	2	2	2	2	1	13
Enhance the reputation of Marrawah as a surf outpost and 'must do' coastal stop - Surfing tours and packages	3	3	4	3	3	2	2	20
Enhance the reputation of Marrawah as a surf outpost and 'must do' coastal stop - Laid-back budget accommodation / hostel with equipment hire (surfing, cycling, fishing)	2	2	2	2	2	1	1	12
Fishing tours / hire from shack towns including floundering trips and diving for abalone	4	3	3	3	3	3	2	21
Horse-riding (outside of reserves); shorter beach/trail rides and multi-day trips	4	3	3	3	3	3	2	21
Explore opportunities for appropriate and sustainable 4WD access and experiences, including old mining towns such as Balfour and Magnet - Add on activities including fossicking for minerals and metal detecting	4	3	3	3	2	3	2	20
Explore opportunities for appropriate and sustainable 4WD access and experiences, including old mining towns such as Balfour and Magnet - Introduce virtual or augmented reality technology and/or soundscapes to bring ghost towns back to life	3	2	2	2	2	3	2	16

IDEAS PROPOSED BY FIELD TRIP GROUP TO DELIVER RAW & WILD THEME	MATCH TO REIMAGINING RAW & WILD THEME	MATCH TO TAS BRAND ESSENCE TO FEEL MORE HUMAN, TO BE TASMANIAN (KNOWLEDGEABLE, CULTURE, CLEAR, COMPOSED, NURTURING, SENSITIVE, HONEST, REAL	MATCH TO NW BRAND ATTRIBUTES (BRUTAL AGAINST BEAUTY - DISARMING, OFFBEAT, ORIGINAL SEDUCTIVE	MATCH TO TAS TARGET MARKET ERUDITES (LEARNING, CHALLENGING, STEP BACK & REFLECT, REFRESH & RENEW)	MATCH TO TAS TARGET MARKET RAW URBANITES (ESCAPE, BACK TO BASICS, RECONNECT WITH SELF, NATURE & OTHERS)	DIFFERENTIATION WITHIN TAS	WOW FACTOR	TOTAL SCORE
Golf course at Robbins Island	1	1	1	1	2	2	1	9
Improve / expand the visitor experiences available at the Nut in Stanley - Improved interpretation and more specific 'photo opportunities' (in partnership with chairlift operations)	1	1	1	1	1	2	1	8
Improve / expand the visitor experiences available at the Nut in Stanley - Downhill zipline or luge alongside walking track	2	1	1	1	1	3	2	11
Improve / expand the visitor experiences available at the Nut in Stanley - Coasteering and/or rock-climbing (the Nut, and Rocky Cape National Park)	4	3	3	3	3	3	3	22
Revamped Stanley Seal Cruise with fit-for-purpose boat and enhanced interpretation to provide a stronger experience and enable a longer operating season	3	3	3	3	3	3	2	20
Make the proximity to little penguins an essential part of the Stanley experience - provide red-lights and wildlife spotting guidelines in accommodation / Infra-red goggle night tours of Stanley's best penguin / wildlife viewing locations	3	2	2	2	2	3	3	17
Niche events, e.g. a Crime Writing Festival at Highfield House, inside looking out at the moody winter weather	1	3	4	3	3	2	1	17
Explore opportunities for a new multi-day 'great walk' in the far north west - incorporating coast, forest and river-based landscapes on the western coast	4	3	3	3	3	2	2	20
Explore opportunities for a new multi-day 'great walk' in the far north west - from Granville/Trial Harbour to Pieman Heads	4	3	3	3	3	2	2	20
Explore opportunities for a new multi-day 'great walk' in the far north west - Not just walking – multi-activity options including rafting and cycling	4	3	3	4	4	4	3	25
Explore opportunities for a new multi-day 'great walk' in the far north west - A journey/interpretation based on the seasonal movements of north west clans, or 'tracking the Tasmanian tiger'	5	3	3	4	4	4	4	27
A museum of Tasmanian shacks / shack life	3	3	3	3	3	3	2	20
Character pub/s at 'The Edge of the World' (Arthur River and/or Marrawah)	2	4	3	3	3	3	3	21
A boutique health retreat and/or spa	2	4	2	3	2	2	2	17
Treetops camping / tree houses and glamping in the Tarkine	4	4	3	3	4	4	4	26
Self-contained pod accommodation and tin-shed hideaways	3	3	3	3	4	3	3	22

APPENDIX 4:
Market Testing Results – Conducted by SMA Tourism, July 2019

E – 1 RESPONDENT PROFILE

GENERAL PROFILE OF FULL SAMPLE

ORIGIN

We sampled 132 respondents:

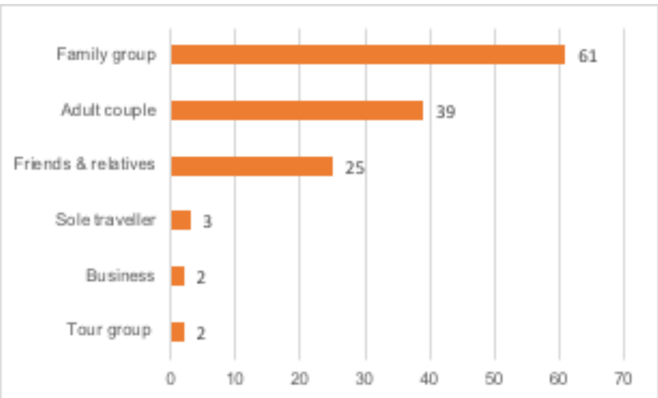
- 15 per cent (20) came from international sources; and
- 85 per cent (112) came from interstate.

TRAVEL PARTY

Due to the sampling occurring over the school holiday period, the sample contained an abnormally high proportion of people travelling as family groups (almost half the respondents). The breakdown of travel party was:

- 2 per cent (3) were sole travellers;
- 30 per cent (39) were travelling as adult couples;
- 46 per cent (61) were travelling as family groups (adults travelling with children);
- 19 per cent (25) travelling as friends and / or relatives;
- 1.5 per cent (2) on business; and
- 1.5 per cent (2) travelling in a tour group.

FIGURE E-1: BREAKDOWN OF TRAVEL PARTY ACROSS RESPONDENTS



REPRESENTATION BY TASMANIAN AUDIENCE SEGMENTS

The vast majority (89 per cent) of respondents believed that they were one of the Tasmanian target audience segments. We believe that this is artificially high, because the only other option to select was Other. Had other segments been available, some respondents probably would have chosen them. The breakdown of the target segments was:

- 28 per cent (37) Raw Urbanites (selected "escaping a busy lifestyle, need to get back to basics as best describing them on travelling to Tasmania); and
- 61 per cent (81) Erudites (selected "naturally curious, want to discover, learn, step back and reflect)
- 10 per cent (14) Other market (identified that they did not relate to either statement)

PURPOSE OF VISIT

The vast majority of respondents (91 per cent) were visiting Tasmania as a holiday. The remainder were visiting Tasmania to visit friends or relatives (7 per cent, 9) or were on business in Tasmania (2 per cent, 3).

MEANS OF TRAVEL

The vast majority of respondents (82.5 per cent (109) were on a fly drive package. Specifically:

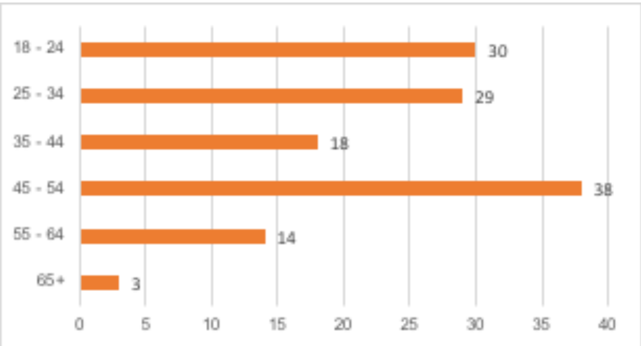
- 82.5 per cent (109) had flown to Tasmania and then hired a car to travel throughout the state;
- 13 per cent (17) took their own car on the Sealink ferry; and
- 4.5 per cent (6) respondents had flown and were part of a guided tour.

AGE

Unlike the far north west region, the age of respondents was quite widely dispersed (possibly due to it being school holidays), with only a small proportion over 65 years – this is a significant variation to the regional profile. Detailed age breakdowns were:

- 22.6 per cent (30) aged 18-24 years;
- 22 per cent (29) aged 25-34 years;
- 13.7 per cent (18) aged 35-44 years;
- 29 per cent (38) aged 45-54 years;
- 10.6 per cent (14) aged 55-64 years; and
- 2.1 per cent (3) aged 65+ years.

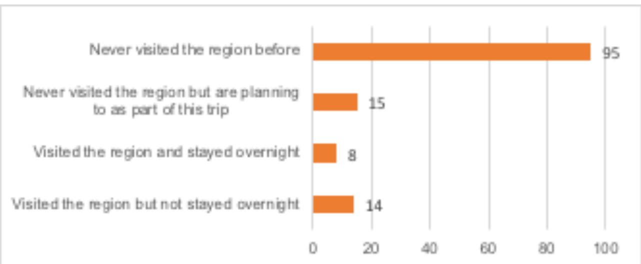
FIGURE E-2 BREAKDOWN OF AGE DISTRIBUTION ACROSS RESPONDENTS



VISITATION TO THE FAR NORTH WEST REGION

The vast majority of respondents (83 per cent) had not visited the far north west region, as shown by Figure E-3.

FIGURE E-3 BREAKDOWN OF PAST AND INTENDED VISITATION TO THE REGION



The figures in detail are:

- 72 per cent (95) had never visited the far north west region of Tasmania and were not intending to on this trip;
- 11 per cent (15) had not visited the far north west region of Tasmania but were planning to on this trip;
- 6 per cent (8) had visited the region previously but not stayed overnight; and
- 11 per cent (14) had previously stayed overnight in the region/

FURTHER ANALYSIS OF THE ADULT COUPLE SAMPLE

To check on the potential influence of school holidays, we analysed the 39 respondents that identified themselves as travelling in Tasmania as adult couples. What we found was that adult couples were:

- slightly more likely to be Raw Urbanites;
- generally younger; and
- were slightly more likely to visit the region in the future.

E – 2 PREFERRED EXPERIENCES

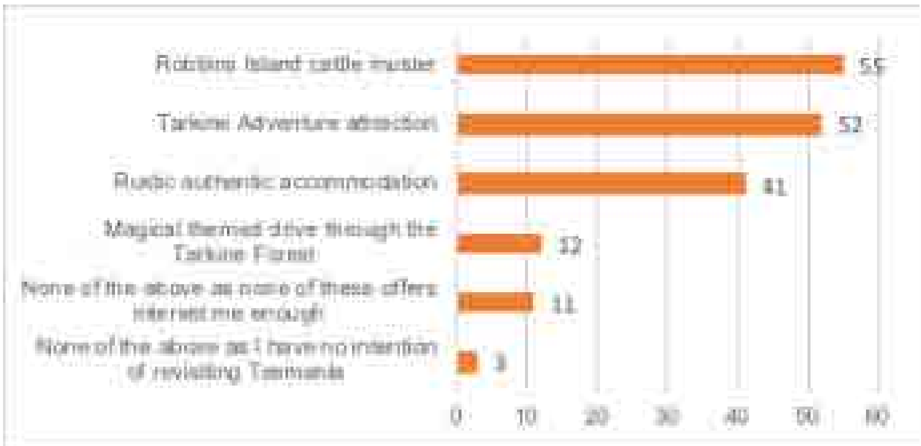
Respondents were asked to prioritise the experiences according to which one was most likely to influence them to stay overnight in the region or spend an additional night in the region. Figure E–1 presents the results of this question, and shows the top three experiences were

1. Robbins Island Cattle Muster
(42 per cent or 55 of respondents);
2. Tarkine Adventure Attraction
(39 per cent, or 52 respondents); and
3. Rustic Authentic Accommodation
(31 per cent, or 41 respondents).

There were two specific experiences driving the high score for the Robbins Land Cattle Muster:

- Guided overnight tour to Robbins Island (via boat), including a gourmet dinner (featuring wagyu local beef), with a film about the muster, overnight stay in authentic accommodation, and either a horse ride or All Terrain Vehicle ride over part of the muster route (3.9 weighted average score)
- Guided day tour to Robbins Island (via boat), including a gourmet lunch (featuring wagyu local beef), with a film about the muster, horse ride over part of the muster route (3.43 weighted average score)

FIGURE E-4 RELATIVE LEVEL OF INFLUENCE OF THE EXPERIENCE CONCEPTS TO STAY OVERNIGHT IN THE REGION OR SPEND AN ADDITIONAL NIGHT IN THE REGION



These products rated significantly higher than the guided tour to the observation platform (including film / VR and gourmet lunch) that did not include visiting Robbins Island.

These products ranked slightly higher:

- among respondents that had never visited the region before and were not intending to visit the region on this trip, compared to respondents that had previously visited or were planning to visit on their trip; and
- slightly higher among younger aged respondents (18 – 34 years) than for older markets (45 – 64 years).

The specific product concept driving the highly ranked Tarkine Adventure Attraction was:

- Catered cabins in the forest canopy (4.1 weighted average score);
- Catered glamping on platforms in the forest canopy (4.0 weighted average score); and
- Adding to the existing forest slide a themed ropes course, ziplining and abseiling set of adventure activities (3.45 weighted average score).

These products ranked slightly higher among respondents that had previously visited or were planning to visit on their trip, compared to respondents that had never visited the region before and were not intending to visit the region on this trip.

The specific product concept driving the highly ranked Rustic Accommodation was:

- Converted Farm Sheds (3.95 weighted average score); and
- Coastal Shacks (3.82 weighted average score).

E – 3 FURTHER ANALYSIS BY MARKET SEGMENT

NO SIGNIFICANT DEMOGRAPHIC PROFILE DIFFERENCES

In comparing the Raw Urbanites and Erudite respondent demographic profiles, we found no significant difference in attributes.

Erudites have been identified in Section 3 as having a stronger match with the overall competitive advantages of the Far North West. The majority of respondents identified themselves as Erudites.

PREFERRED EXPERIENCES BY TASMANIAN TARGET MARKET SEGMENT

In terms of preferred product concepts:

- The Robbins Island Cattle Muster generated minimal difference between the two segments
- The Tarkine Adventure experience generated a slight difference, with the Raw Urbanites slightly preferring the cabins (less hassle) and the Erudites slightly preferring the glamping (more immersive)
- The converted Farm Sheds were preferred by the Raw Urbanites slightly more than the Coastal Shacks (perceived as more comfortable in the images shown); and
- There was no preference between the converted Farm Sheds versus the Coastal Shacks for the Erudites.

TASMANIA

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Tasmanian Government

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