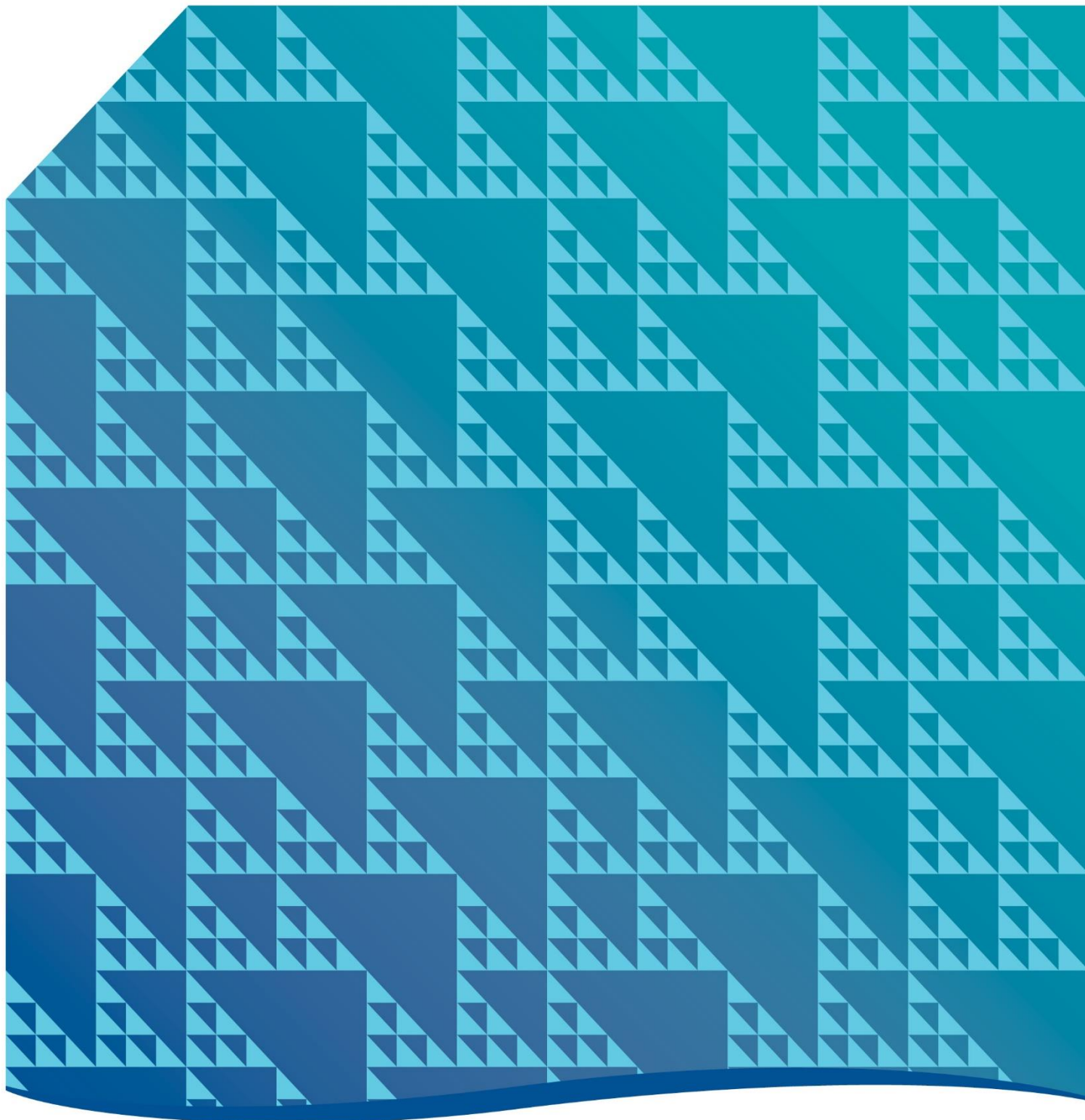


Great Eastern Drive: Consultation Report

Tasmanian Journeys Project

7 May 2020



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Terms and acronyms

Below are a list of terms and acronyms used in this Report, as well as their meanings.

Terms or acronym	Description
BAU	Business as usual
DAP	Destination Action Plan
The Division	The Cultural and Tourism Development Division (of State Growth)
ECTT	East Coast Tasmania Tourism (Regional Tourism Organisation)
FTE	Full-time equivalent
GED	Great Eastern Drive
RTOs	Regional Tourism Organisation
RV	Recreational vehicle: A type of van equipped for touring holidays
State Growth	Department of State Growth

Executive summary

In June 2015 the Tasmanian Government launched a self-drive touring route along Tasmania's East Coast called the Great Eastern Drive (GED) – a 176km stretch of scenic road from Orford to St Helens. The initiative was hugely successful over coming years, contributing to an increase in visitors to Tasmania's East Coast.

The success of the GED led to the development of a second drive journey in 2018, the Western Wilds, as well as a commitment of government funding to develop an additional three journeys under an expanded Tasmanian Journeys Project. The Journeys Project will deliver a cohesive suite of self-drive touring experiences that encourage people to explore regional Tasmania. This initiative has become even more important following the COVID-19 pandemic which has had a significantly detrimental effect on the visitor economy in Tasmania (as it has around the world). Journeys will have an important role to play in helping regional economies to recover in Tasmania after the pandemic has passed.

During 2019, the Department of State Growth (State Growth), as the project owner, undertook a thorough consultation exercise with industry and other stakeholders around the three new proposed Journeys. That resulted in a number of findings and recommendations included in a report which is available online:

https://www.stategrowth.tas.gov.au/business/cultural_and_tourism_development/tasmanian_journeys_project

The Project Team was also committed to consulting around the future of the GED. While the GED served as the inspiration for the entire Journeys Project, it did so with a proposition that is largely linear: a road running the length of the East Coast. The other Journeys are being developed using a different model: one where visitors are encouraged to explore an area based on their interests and passions rather than to follow a prescribed and linear touring route. This evolved approach is based on changing consumer behaviour – consumers are not necessarily looking for a prescribed touring solution but rather the tools and insights to create their own experience their own way.

Stakeholder consultation on the East Coast of Tasmania was delivered between February and April 2020 to explore industry sentiment and gather insights in relation to the opportunity that the Journeys Project provides to review the current GED in line with evolved target markets and consumer behaviour. Some elements of the original consultation plan needed to be cancelled due to the COVID-19 pandemic and the resulting restrictions imposed and impacts on industry stakeholders.

The key finding from the consultation exercise undertaken is that there is broad support among stakeholders for the evolution of the Great Eastern Drive within the context of the Journeys Project. This includes:

Working with ECTT and others to develop:

- A Regional Brand for the East Coast.
- A separate (but connected) visual identity for an evolved GED.
- A clear brand hierarchy and a distinct proposition for each entity, with East Coast Tasmania as the primary/parent brand, and the evolved GED as a signature product that sits under East Coast Tasmania.

Working with relevant stakeholders to deliver an evolved GED which:

- Is part of the overall Journeys Project.
- Is based on a touring holidays approach.
- Covers the East Coast *as a broad area* rather than a linear route and disperses visitors off the main road.
- Has a core theme (see below).

- Aligns to the other Journeys to create a complementary and cohesive visitor experience across the suite of five Journeys.

The consultation exercise also provided valuable information from industry stakeholders to help inform the development of themes for the GED that will form the basis of the point of difference when undertaking marketing activities. The themes that emerged from industry included the following:

1. Scenery and nature.
2. Escape (peace and quiet).
3. Like a local.

There were numerous additional findings from the consultation process, many of these related to the implementation of the project and stakeholder engagement. These are listed in the Findings section of this Report.

Building on the findings, this Report contains multiple recommendations. The Project Team will be guided by these in their planning, implementation and marketing work for the initiative going forward.

Next steps

The findings and recommendations from this report will be used in the ongoing development and evolution of the GED. The potential themes identified for the GED will be refined and developed into concepts to consumer-test with target markets. The GED Working Group will be convened, and the group will be presented with the results from the consumer testing of themes, for endorsement.

The endorsed theme will then be provided to the Project Team's creative agency which will develop potential executions of an evolved GED visual identity. The Working Group will review those recommendations and endorse a future direction. All potential executions of the GED visual identity will be aligned to Tasmania's Come Down for Air brand positioning.

The Working Group will also discuss other findings and recommendations from this report such as whether to review the current footprint of the GED and industry development opportunities.

Background

The Great Eastern Drive

In June 2015 the Tasmanian Government launched the GED initiative¹ – a self-drive touring route along Tasmania's East Coast. The route covered a 176km stretch of scenic road from Orford to St Helens, taking in spectacular ocean views and beautiful rural vistas.

The Government's initiative was backed by \$500,000 of investment to support the delivery of safety improvements, tourism and directional signage and a national marketing campaign.

From the beginning, the aim was to ensure that the GED became one of Australia's most iconic road trips. This aim was advanced with the support of an extensive marketing campaign designed to showcase the route's strengths with the aim of increasing visitation and spend.

The initiative experienced success as a tourist attraction and from May 2019 the Tasmanian Government has invested further funds in upgrading the road under the Government's Roads to Support Tasmania's Visitor Economy program. The investment is designed to enhance the experience for the many GED visitors as well as improve safety for all road users, including locals.

Since its launch, the GED has successfully contributed to an increase in visitors to Tasmania's East Coast.

The Journeys Project

The success of the GED led to the expansion of the initiative to include a second drive, the Western Wilds, as part of a new 'Journeys Project'. This was launched in October 2018² and encourages visitors to explore a broad area rather than a prescribed linear touring route. The Western Wilds is designed to engage touring visitors as they travel through western Tasmania and support businesses as part of the visitor economy in Tasmania.

In the 2018-19 Budget the Tasmanian Government then committed a further \$1.4 million to support the planning and implementation of three additional self-drive Journeys under the Journeys Project banner. The design and development of the new Journeys will follow the model of the Western Wilds, where visitors are encouraged to explore an area based on their interests and passions, rather than sending them on a prescribed and linear touring route. Under this model, a Journey is defined as a "touring holiday" which encourages stays of more than two nights away from the metropolitan hubs of Launceston and Hobart.

The Journeys Project will ultimately deliver a suite of five Journeys across Tasmania – including an evolved GED, based on the positive reception this proposal has received by key stakeholders on the East Coast.

The aim of the Journeys Project is to ensure that regional Tasmania benefits from the visitor economy. This aim has received a renewed importance in light of the COVID-19 pandemic which has had a significantly detrimental effect on the visitor economy as the result of intense restrictions on local, domestic and international travel.

The intention is for the five Journeys to complement one another. The five Journeys are not rigid, and travellers can choose different ways to engage with them and create their own adventure within the framework provided.

¹ http://www.premier.tas.gov.au/releases/great_eastern_drive_campaign_launched

² http://www.premier.tas.gov.au/releases/welcoming_visitors_to_the_western_wilds

State Growth and Tourism Tasmania are working closely with the Regional Tourism Organisations (RTOs) on the Journeys Project. Once all the Journeys are implemented, the RTOs will take the lead in the ongoing development and maintenance of each Journey as part of their Business as Usual (BaU) program. Tourism Tasmania will continue to market the Journeys as part of Tasmania's touring marketing strategy.

SELF-DRIVE: Driving near Kelvedon Beach on Tasmania's East Coast.



Tasmania: Come Down for Air

In October 2019, Tourism Tasmania launched a new tourism brand platform, Tasmania: Come Down for Air³. The new brand platform positions Tasmania as the antidote to the stresses of modern-day life. It invites travellers to 'come down for air' in both a literal and metaphorical sense.

This new approach is described as a deliberate departure from traditional destination marketing, and the new brand position – which will feature for the next three to five years – will tap into a feeling about what is possible in Tasmania and about how Tasmania makes visitors feel.

All marketing efforts going forward, need to closely align to the new brand position, including the Journeys.

³ <https://www.tourismtasmania.com.au/marketing/brand-launch>

Target consumers

The previous target market of Lifelong Learners has evolved into two distinct categories: Raw Urbanites and Erudites.

Raw Urbanites are motivated by a need to escape a busy lifestyle and refresh the mind. For them, fulfilment comes from taking a moment to pause and reflect. Travel, for this group, is about reconnection with the things that matter most. The need to reconnect and escape is prevalent among all genders and ages but there is a strong cohort of 30-39 year olds with young families. Raw Urbanites tend to live in metropolitan areas, but they are also typical of the general population of Australia, with most living in New South Wales, Victoria and Queensland.

The Erudites are not just travellers, they are explorers. Travel is not simply about escaping but about discovering. Refreshment and renewal come from new and unique experiences that they can take home and enrich their minds. Erudites are strongly represented in 60+ year olds, but there is also a strong cohort of curious, young (18-29 year old) erudite explorers. They live all around Australia but are most prominent in cities, and particularly New South Wales and Victoria. Also a strong proportion of sea-change retirees in regional areas.

Both the Raw Urbanites and Erudites are key target markets for the Journeys and self-drive touring in Tasmania.

Consultation process

A detailed stakeholder consultation was planned to explore stakeholder sentiment around the possible evolution of the GED as part of the Journeys Project. This included several Meetings with industry leaders and an extensive round of Community Forums throughout the East Coast region. However, the original consultation plan was impacted significantly by the COVID-19 pandemic.

The Community Forums scheduled for late April 2020 in St Helens, Bicheno, Swansea, Coles Bay and Triabunna were cancelled due to the COVID-19 restrictions on movement and interaction, along with the fact that many operators had other significant and pressing concerns to deal with, including the future of their businesses.

Alternative activities were introduced instead, to ensure at least some industry input could be considered as planning moves forward. An outline of the activities undertaken is provided below:

- Two in-person Meetings before the effects of COVID-19 were felt in Tasmania and the restrictions on movement came into force. The first meeting was with the Super DAP Group leaders in Swansea on 14 February 2020, and the second was with the ECTT Board in Orford on 19 February 2020.
- An Industry Sentiment Survey was conducted in March 2020 to try and understand what industry thought about the current GED.
- A report was commissioned in March 2020 to explore current consumer sentiment in relation to the East Coast brand family (East Coast Tasmania, Great Eastern Drive, and Great Eastern Wine Drive).
- To replace the Community Forums, the Project Team invested considerable effort in developing and hosting two Online Forums that included representation from DAP groups and the ECTT Board. Both the Meetings and the Online Forums were underpinned by a well-researched presentation, backed by opportunities for participant input (both through questions and answers and interactive exercises).
- Finally, all the consulted stakeholders were provided with the opportunity to contact the Journeys Project Manager directly with any additional thoughts about the evolution of the GED.

More detailed information about each element of the stakeholder consultation process is provided in Appendix A.



Image Credit: Lisa Kuilenburg.

ESCAPE: Taking a break on the Great Eastern Drive

Key findings

A number of key findings from the consultation process are provided below, with more detailed findings from each consultation activity provided in Appendix B.

Participating in the Journeys Project

There was very broad support across the consultation for the following:

- Reviewing the current GED and exploring what an evolved GED might look like.
- Adopting a touring holidays approach in the evolution of the GED.
- Taking an area rather than linear approach for an evolved GED.
- Having core (and different) themes for each Journey as a point of difference – including the GED.
- The Journeys being complementary and cohesive from a visitor perspective, rather than competitive propositions.

East Coast brand hierarchy

There was very broad support across the consultation for the following:

- A Regional Brand for the East Coast that helps consumers develop a coherent, consistent and meaningful sense of place and at the same time acts as the brand for tourism planning and management.
- The East Coast Tasmania regional brand should hold different experiences and information than the Great Eastern Drive.
- East Coast Tasmania and Great Eastern Drive should become individual but related entities, with a clear hierarchy and a proposition that allows consumers to explore all products and experiences on the East Coast, not just those relating to self-drive touring.

Themes

For this Report, an analysis was conducted of the information and insights gained from across the Meetings, Online Forums, Industry Sentiment Survey and the Consumer Sentiment Report around the potential themes for an evolved GED. The conclusions from this analysis are provided below.

Three possible themes

The following themes are proposed for the evolved Great Eastern Drive:

1. Scenery and nature – natural environment, unspoilt beaches, ocean, wildlife and birds.
2. Escape (peace and quiet) – get away from stresses of modern life, something unique around each bend to make you feel in another world, laid back, relaxed, simplicity, slow pace, space.
3. Live like a local – hidden locations to explore and rediscover the joy of touring, discover local secrets.

Other topics

The following topics were mentioned by participants, but far less forcefully than those mentioned above:

- Food and wine: Vineyards, seafood, good Tassie food.
- Authenticity: Feeling the realness - not contrived.
- People: The amazing people along the way, passionate local people, friendly people to meet.
- Active: Looking for outdoor activities such as walking cycling.

The consumer sentiment report produced similar results although with a slightly different emphasis. This can be attributed to the analysis looking at all of East Coast Tasmania's consumer brands (East Coast Tasmania, Great Eastern Drive, and the Great Eastern Wine Drive), instead of just the Great Eastern Drive. Nevertheless, the degree of crossover provides some comfort that there is wide agreement on what consumers are looking for when visiting Tasmania's East Coast.

1. Scenery

- Wilderness adventures
- Landscapes and contrasting landscapes, where the mountains meet the sea
- Wildlife and native animals
- White sand beaches, local fishing and camping spots

2. Sites

- National parks; in particular Freycinet and Wineglass Bay
- Bay of fires
- Popular surfing sites
- Towns such as Bicheno

3. Solitude

- Stillness and seclusion
- Serenity and peacefulness
- Remoteness including camping and caravan holidays
- Soul soothing

4. Spirit

- Adventure, including hiking trails and surfing spots
- Community spirit, smaller suburbs on the road
- Free spirit

A full report in relation to the consumer sentiment research will be available as a separate document.

Recommendations

The following recommendation are proposed following the consultation process undertaken around the potential evolution of the GED.

Regional brand and brand hierarchy

Develop the following:

- A Regional Brand for the East Coast.
- A separate (but connected) visual identity for an evolved GED.
- A clear brand hierarchy and a distinct proposition for each entity, with East Coast Tasmania as the primary/parent brand, and the evolved GED as a signature product under East Coast Tasmania.

Journeys

Work with relevant stakeholders to deliver an evolved GED that:

- Is part of the overall Journeys Project.
- Is based on a touring holidays approach.
- Covers the East Coast *as a broad area* rather than a linear route and disperses visitors off the main road.
- Has a core theme (see below).
- Aligns to the other Journeys to create a complementary and cohesive visitor experience across the suite of five Journeys.

Themes

Develop concepts to consumer-test from the themes identified (listed below) and use the one that tests the best to develop potential visual identity executions for a reinvigorated GED.

1. Scenery and nature.
2. Escape (peace and quiet).
3. Like a local.

Footprint

Review the current footprint of the GED and determine whether it would be beneficial to extend the footprint further north or south (to Buckland).

All year around

Work with key stakeholders to promote the East Coast as an all year-round destination both through the Journeys Project and through other Tourism Tasmania and ECTT initiatives.

Primary consideration

Advise the Working Group that “visitor information resources and services” was identified by the Online Forum participants as a primary consideration.

Sustainability

As with the rest of the Journeys Project, continue to work to raise the environmental credentials of the initiative including through electric vehicles and recharging infrastructure.

Signage

As with the rest of the Journeys Project, consider how best to manage signage associated with the initiative.

Engagement

As with the rest of the Journeys Project, continue to build on the goodwill generated by the Meetings and the Online Forums by sharing further information with stakeholders as the project unfolds.

Next steps

The findings and recommendations from this report will be used in the ongoing development and evolution of the GED. The report contains a number of potential themes for the GED which will be refined and developed into concepts to consumer-test, to discover which theme/s resonate most with target markets.

The GED Working Group will be convened, and the group will be presented with the results from the consumer testing of themes, for endorsement.

The endorsed theme will then be provided to the The20 as the creative agency responsible for developing the visual identities for the Journeys. The20 will develop some potential executions of an evolved GED visual identity to be presented to the Working Group, who will review the recommendations and endorse a future direction. All potential executions of the GED visual identity will be aligned to Tasmania's Come Down for Air brand positioning.

The Working Group will also discuss all findings and recommendations from this report such as whether to review the current footprint of the GED and any industry development opportunities that may exist or be required.



Appendix A

Consultation activities

A summary of the activities undertaken as part of the consultation process is provided in the main body of this report. More detailed information about each element of the process is provided below.

Key stakeholder Meetings

The Journeys Project Team presented to two key stakeholder groups:

1. East Coast Super DAP Group Leaders – Friday 14 February 2020, Swansea (eight leaders attended).
2. ECTT Board – Wednesday 19 February 2020, Orford (nine board members attended).

Presentation format

ACTIVITY	WHO	DETAILS	COMMENTS
Welcome	Chair	<ul style="list-style-type: none">• Introduce the Project Team and welcome participants.• Hand over to Amanda to run the session.	Formal introduction.
Plan for the session	Amanda	<ul style="list-style-type: none">• Thank you for coming and introductions.• Aims of the session.• Summary of agenda and confirm end time.	Setting the direction.
Presentation	Amanda, Pete	<ul style="list-style-type: none">• PowerPoint presentation and commentary.	Some questions asked and answered during the presentation.
Q&A	Amanda, Pete	<ul style="list-style-type: none">• Amanda and Pete to take question from the floor and answer as they are asked.	
Next steps	Amanda	<ul style="list-style-type: none">• Confirm next steps.• Provide contact details.	Places the session in a bigger context and brings future focus.
Thank you	Amanda	<ul style="list-style-type: none">• Quick thanks to participants for attending.	Closes session.

Industry Sentiment Survey

An industry sentiment survey was conducted in March and was available to complete online for a two-week period. A total of 61 respondents participated in the survey, and the following questions or statements were answered using a scale from strongly agree to strongly disagree:

1. The GED is relevant for East Coast tourism.
2. The GED is important to my business.
3. The GED improves the visibility of my business to tourists.

Two further questions were asked that required a Yes, No, or N/A response:

4. Have visitors to your business/organisation expressed positive feedback about the GED?
5. Have visitors to your business/organisation expressed negative feedback about the GED?

Respondents were also offered the opportunity to provide further commentary in relation to the GED using a free text box.

Facilitated Online Forums

As a result of the impact of COVID-19, the Project Team rapidly developed and hosted two successful facilitated Online Forums to replace the planned in-person events that were unable to take place.

Two separate two-hour Online Forums were delivered on 8 April 2020. These were targeted at DAP group members and Board members of ECTT. This allowed the Project Team to draw on the knowledge from stakeholders with detailed local understanding of tourism on the East Coast.

The morning Forum ran from 10am to 12 noon and attracted five participants. The afternoon Forum ran from 4pm to 6pm and attracted eight participants, delivering a total of 13 participants across both sessions.

Online Forums format

Each Online Forum followed the same format as set out in the table below.

Time: Two hours (with ten minutes at the start for early arrivers)

ACTIVITY	WHO	DETAILS	COMMENTS
Welcome participants as they join early	Leigh	<ul style="list-style-type: none">• Welcome participants.• Say we're giving people time to join us.	Chat to people via Chat.
Guide participants who turn up early through the platform facilities	Linda	<ul style="list-style-type: none">• Turning on their mic.• Switching to gallery view.• Participating via the Chat buttons.• Etc.	Keep it basic.
Settle and welcome	Rhonda	<ul style="list-style-type: none">• Participants settle in.• Short welcome from Rhonda, CEO ECTT: Welcome to all and intro the DSG team.• Hand over to Leigh.	
Setting expectations	Leigh / Linda	<p>Leigh: The limitations</p> <ul style="list-style-type: none">• Say to participants that we will make mistakes and that's OK. We're all learning about these new ways to work together through the COVID-19 pandemic. <p>Linda: The norms</p> <ul style="list-style-type: none">• Be patient as everyone learns how to do this.	Taking off the pressure. Setting the boundaries. Outlining the meeting.

		<ul style="list-style-type: none"> • No interrupting – be on mute unless you’re speaking. • Put up your hands if you have a question. • Breakout rooms – what they are. • Polls – what they are. • If kids come in everyone waves! <p>Leigh: Meeting structure</p> <ul style="list-style-type: none"> • State the structure and flow of the meeting. • Say when the meeting will end. 	
Connecting	Leigh	<p>A quick poll</p> <ul style="list-style-type: none"> • Asking people to complete a quick fun poll. <p>Saying hello via chat</p> <ul style="list-style-type: none"> • Invite participants to say hello, write their name and where they’re from in the Chatbox. 	<p>Three aims</p> <ul style="list-style-type: none"> • ID people as individuals. • Building connections. • Moving into relevant action.
Calling for questions	Leigh	<p>Explain:</p> <ul style="list-style-type: none"> • We’re about to see a presentation. • Everyone on mute throughout the prez. • Send your questions via chat to me during the prez. • We’ll respond to all the questions afterwards. • And we’ll take a few extra questions at the end too. 	Getting the best from the presentation.
The presentation	Amanda, Pete	<ul style="list-style-type: none"> • State the meeting goals and purpose. • State the outputs we are looking for. • Give the presentation. • Keep asking people for their thoughts and questions! 	Setting the tone.
Question/discussion time	Amanda, Pete, Leigh	<ul style="list-style-type: none"> • Leigh to put the questions to Amanda and Pete. One question (or topic) at a time. • Amanda and Pete to answer Qs (and indicate which will be taken on notice including ones left over). • Leigh to check with the group all Qs were asked/ answered. • Leigh to invite a discussion. 	Leigh to lead this.
Exercise: How do your customers behave?	Leigh	<ul style="list-style-type: none"> • Leigh to explain. • Everyone to work on individually on the questions. 	To generate ideas around themes.

		<ul style="list-style-type: none"> • Then people sent into breakout groups to discuss their findings: try to find themes/ commonalities. • Write a list of the major themes that have emerged. • Amanda and Pete in separate groups listening. • Leigh to move between the groups helping. • Back to the main group to feedback. 	
Exercise: My area is great for self-drive touring holidays because...	Leigh	<ul style="list-style-type: none"> • Leigh to explain this is a quick creating writing exercise, called 'Essence'. • People work individually on their answers. • People share with the group if they want to. 	Getting to the 'essence' of what people like about the East Coast.
A poll on money	Amanda / Linda	<ul style="list-style-type: none"> • A poll on the \$200K budget. • Amanda to summarise findings, comment on and invite comments in Chatbox. 	To get participants' priorities for investment.
Next steps	Amanda / Linda	<ul style="list-style-type: none"> • Amanda to speak to the next steps. • Poll goes up on the GED transition options. • Comments into Chatbox. • Final comments from Amanda. • Including contact details 	To ensure we have a clear idea on participant views.
Close out and next steps	Leigh	<ul style="list-style-type: none"> • Leigh to thank everyone for the session. • Everyone to unmute and say goodbye. 	

Presentation

The Journeys team delivered a presentation at both the Meetings and during the Online Forums. This presentation was tailored to the East Coast audience with content (imagery and text) relevant to the area.



PRESENTATION: Sharing with the East Coast Tasmania Tourism Board, 19 February 2020.

Below is an outline of the main focus areas of the presentation as delivered at the Online Forums. This is not a detailed description of the presentation, but rather an overview of what was covered.

Setting the scene

- Setting out the objectives/goals:
 1. Sharing information.
 2. Getting information, especially to help develop a theme for the Great Eastern Drive.
 3. Setting out the next steps.

Self-driving touring overview

- Global destinations package self-drive touring in three experience-focussed categories:
 1. Touring routes / scenic drives, e.g. Great Ocean Road (Vic/SA).
 2. Iconic road trips, e.g. Route 66 (USA).
 3. Touring holidays. Leading global example is New Zealand.
- Tasmania's competitive advantage lies in the touring holiday space. Experiential breadth and depth, and the diversity and proximity of experiences.

Tasmania: Come Down for Air

- New cultural brand positioning of Tasmania. Consumers offerings will need to tie in to the brand.
- Tasmanian Journeys Project aims to evolve the visual identity of the Great Eastern Drive so it aligns with the remaining Tasmanian Journeys under the master brand of Tasmania: Come Down for Air.

Journeys Project

- Consumer behaviour is changing – visitors are looking to create their own experience.
- Journeys cover an area rather than prescribed and linear touring routes.
- The Journeys Project will see the development of a suite of five Journeys across Tasmania.
- Primary objective is to drive people into regional areas to stay there longer and spend money.
- Positioning Tasmania as a world-class self-drive touring destination with a cohesive visitor experience.
- Themes will form the basis of the point of difference for the five Journeys.
- We will dial up themes for each Journey to create a point of difference.

Great Eastern Drive

- Background to GED.
- Great opportunity to review GED.
- Aim is to see how the GED could evolve with the Journeys Project to future proof it.

Industry Sentiment Survey results

- We did an Industry Sentiment Survey in March to understand what industry thinks about the GED.
- Findings discussed.

Key recommendations from consumer sentiment research

- A Regional Brand for the East Coast.
- The Regional Brand to hold different experiences and information from the Great Eastern Drive.
- The two brands to become individual brands with a clear hierarchy, with East Coast Tasmania as the parent brand.

Invitation for questions

- Delivered through a facilitated Question and Answer session.

Consumer sentiment research

The GED is different to the other Journeys – it is already established, and there is equity in the brand that does not have to be built from scratch. To understand more about that existing equity a report was commissioned to examine consumer sentiment about the GED brand, in context with the other existing brands in the east coast brand “family”. This was to understand what consumers currently think – and understand – about these brands and how they fit together to sell the East Coast and the experiences on offer.

The information for this was gathered using a range of tools, including keyword and search reporting to identify how external audiences are searching for and interacting with the various brands online. Social Listening was also used – a process of gathering data from online conversations around topics of interest across social media platforms and web pages in real time.

Appendix B

Consultation findings

In addition to the key findings outlined within the body of this report, the consultation process produced a number of additional findings.

Online Forums findings

Evolving the Great Eastern Drive

Participants were unanimously in favour of exploring what an evolved Great Eastern Drive might look like, with 100% answering 'yes' when asked if they were open to that via an online poll.

All year around

There was strong interest across both Online Forums for making the East Coast an all year-round destination. One participant suggested that many businesses had lots of patronage over the summer months but in order to retain staff and ensure regular income, promoting the area as a year-round destination was needed. Another participant noted that investors also wanted income to be annual rather than seasonal.

Living like locals

There was broad agreement that visitors to the East Coast were looking for the local, insider knowledge about what to do and experience. This was described as the "local secrets" and "the hidden experiences".

Marketing

Participants had an interest in understanding the ongoing marketing and promotion of the GED. It was explained that this was being supported through the Journeys Project including by the dedicated FTE employee responsible for marketing of the Project. As a result, the GED would receive ongoing marketing into offshore markets along with the other Journeys, which would be beneficial for the region.

Investment

Both Forums were asked, via an online poll, what they would like to see the \$200,000 spent on that State Growth has allocated from the Journeys project budget for supply side activities. Visitor information resources and services was the top answer by a significant majority. Visitor facilities such as picnic tables and seats came second. Signage was third by quite a margin.

Staying for longer

Participants agreed that the majority of guests currently stayed for only 1 to 2 nights. Once they arrive, it appears many guests regret not staying for longer, either because they have underestimated how much time they will need to experience everything they have planned or because they have underestimated the breadth of product on offer in the region.

Icons dominate

Common to both Online Forums was the view that certain key iconic destinations dominate the itineraries of travellers to the East Coast. Chief among them are Maria Island, Freycinet National Park and Bay of Fires. There

was a suggestion that many visitors (perhaps as a consequence of the linear nature of the GED) follow a similar pattern of driving from or to Hobart across these key destinations, regarding the GED as “simply a way to get there”. These journeys tend to be completed with a couple of days before the visitors leave the area altogether.

Quality of food

Some participants expressed concern that perhaps the East Coast has limited choices and lower quality food offerings than would be ideal. One person noted that “sometimes the local pub is the only option”.

Facilities and services

Visitors are reportedly expressing concerns about the quantity and quality of facilities and services. The following were mentioned specifically: Not enough overtaking lanes, the condition of the roads, limited public transport and taxi/Uber, inadequate public toilets, confusion over opening hours, poor footpaths.

A double-edged sword

One participant noted that while operators were keen to see lots of visitors, many of those visitors were looking to escape the crowds. This view was supported by other participants in the Online Forums who wanted to understand how to get that balance right.

Other observations

One participant was concerned about the dangers associated with cyclists on the road. Another noted that business travel formed an important part of trade on the East Coast.

Meeting findings

Call for greater Government involvement

There was interest in the State Government being more involved in the future of the GED. One participant said the GED – and the whole East Coast – had “hit a flat spot” and needed financial support and greater government “ownership” to move forwards.

Responsibility

There was interesting in knowing who would be responsible for the Journeys project beyond 2021. It was explained that the Journeys would become Business as Usual for the RTOs who would take the lead in the ongoing development of the initiative.

Funding

Funding was a concern. Participants wanted to know when the available \$200k would be spent by (end of 2021), what the money could be spent on (supply side activities), how soon it was available (now), who was responsible for determining how it would be spent (the Working Group with approval from State Growth) and how quickly it could be spent (once the Working Group has made informed decisions and approval was granted). One participant wanted access to data to ensure that Working Group spending decisions were informed and coordinated.

Working Group

There was a broad acceptance that in all likelihood, members of the Working Group would come from the DAP groups and ECTT.

Visual identity

There was a keen interest in branding. The Project Team advised that consultants had been hired to develop the visual identities and the names of the Journeys and this would cover the GED, whatever the future of that brand might be, from a complete change to an evolution or no change at all.

GED name

The question was asked whether the name of the GED could change to be more aligned to the other Journeys. The Project Team advised that anything was possible, including changing the name.

Sustainability

The environmental credentials of a self-driving initiative was raised, with calls for investment in electric vehicles and recharging infrastructure. Participants were pleased to hear that the Climate Change Office was rolling out a fast charging station network this year. They also welcomed the fact that the initiative was not focussed on increasing numbers as such but rather attracting high yield visitors (including environmentally conscious travellers who might offset their flights and use electric vehicles powered by Tasmania's renewable energy supply). One participant was asked if there was a map of charging stations and was pointed towards the Plug Share app.

Roads

The question of taking hire cars onto unsealed roads came up. The Project Team said it was working with the Road Safety Advisory Council on getting messages to visitors on driving to Tasmanian conditions. Another participant called for investment in multi-lane roads to avoid frustrations for local drivers caught behind slow visitors. Participants welcomed the Government's \$72 million Roads to Support Tasmania's Visitor Economy program while appreciating this would not upgrade every road in the State.

Signage

One participant asked about road signage, and in particular whether the rules could be relaxed to make it easier for operators to install signage to their attractions. The Project Team agreed that the process could appear complex but underlined that the Government's primary concern was ensuring that signs did not create safety issues, either through their positioning or through cluttering.

Roadkill

The matter of roadkill came up strongly with participants noting that it was "distressing" and "shocking" for visitors. The Project Team pointed to trials being conducted by Parks to prevent animals moving onto the roads while conceding that this was having mixed results. It was also pointed out that work was underway with the Road Safety Advisory Council to help visitors understand the issues around driving from dawn to dusk.

Mobile coverage

One participant noted that mobile phone reception can be poor in the region. The Project Team said this was a matter that could be raised through the Working Group.

Tasman Peninsula

One participant queried the fact that the Tasman Peninsula was not part of the project. It was explained that this was because that area was covered by other initiatives and was performing strongly already.

Industry Sentiment Survey findings

The Project Team carried out an Industry Sentiment Survey in March 2020 to try and understand what industry currently thinks about the Great Eastern Drive.

There were 61 respondents to the survey. The results are shown below.

Survey results

Relevant

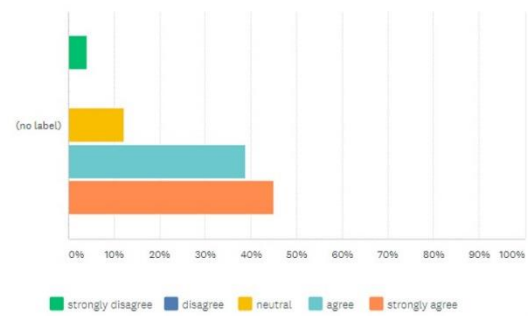
This graph below on the right shows the responses to the statement: “The GED is relevant for East Coast tourism”.

Around 85% of respondents either agreed or strongly agreed with that statement highlighting that there is a strong sentiment towards the GED being relevant.

Around only 5% disagreed or strongly disagreed.

The Great Eastern Drive is relevant for East Coast tourism

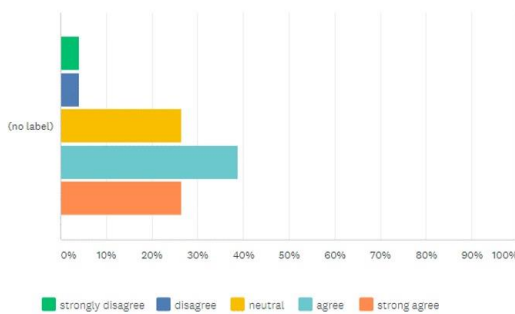
Answered: 49 Skipped: 12



Important

The Great Eastern Drive is important to my business

Answered: 49 Skipped: 12



Around 65% of respondents either agreed or strongly agreed that the GED is important to their business with 25% of respondents being “neutral”.

This indicates a moderate to strong sentiment from industry in relation to this statement.

Visibility

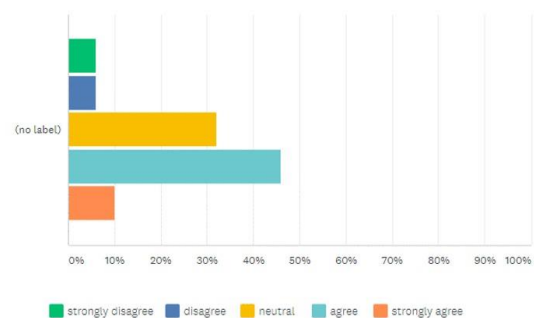
The statement here was: “The GED improves the visibility of my business to tourists”.

Just over half of respondents felt that the GED does improve the visibility of their business to tourists.

A 30% were neutral or neither agreed nor disagreed.

The Great Eastern Drive improves the visibility of my business to tourists

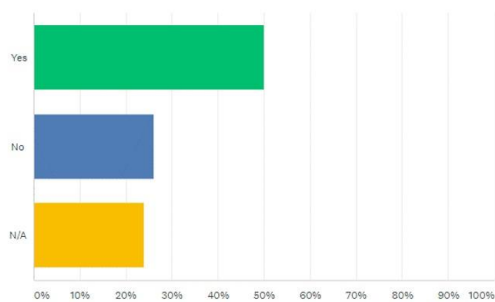
Answered: 50 Skipped: 11



Positive

Have visitors to your business/organisation expressed positive feedback about the GED?

Answered: 50 Skipped: 11



The question asked was: “Have visitors to your business or organisation expressed positive feedback about the GED?”

Half of the respondents reported that they had received positive feedback from visitors regarding the GED.

25% of respondents had not received any positive feedback from visitors about the GED.

And 25% of respondents answered N/A.

Negative

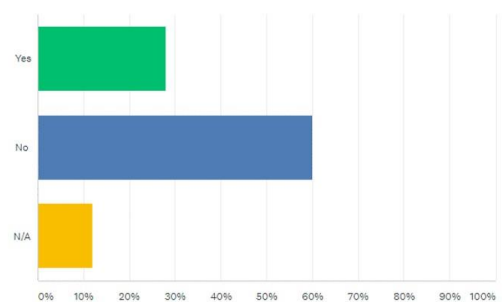
The question asked was: “Have visitors to your business or organisation expressed negative feedback about the GED?”

60% of industry respondents reported that they had not received negative feedback from visitors regarding the GED.

Approximately 30% of industry respondents had received negative feedback from visitors about the GED.

Have visitors to your business/organisation expressed negative feedback about the GED?

Answered: 50 Skipped: 11



Further comments

The final statement of the survey was: “Please feel free to provide further comments on the GED”.

Responses to this covered a range of topics.

Infrastructure comments included:

- Road condition is an issue, particularly with large numbers of caravans / RVs using the road.
- Lack of double lane overtaking opportunities.

Education comments included:

- RV driver lack of awareness around pulling over to let others past.
- Can make the drive less enjoyable than it should be.

Footprint comments included:

- Needs to be extended further North.
- Also comments about extending further South.

Branding comments included:

- Please continue with this fantastic branding!
- It's 2020 – time for a change.

Wildlife – comments included:

- Road safety and reducing wildlife roadkill need to be a priority.

Miscellaneous comments included:

- Seems to have very little relevance to tourists who simply accept the drive for what it is whatever that may be.
- It is a coastal drive and this is its USP [unique selling point] vs the other drives.

Conclusions from the Survey

The following conclusions are proposed from the Industry Sentiment Survey:

1. Industry thinks the GED is an important and valuable initiative that delivers business to their door.
2. Visitors have a generally positive impression and experience of the GED.
3. There is room for improvement especially with road infrastructure and driver awareness.

Consumer sentiment research findings

Some preliminary top-line findings from the consumer sentiment research undertaken include:

- Consumer sentiment for all three brands is positive, driven by the natural beauty in the region.
- The three brands each have a different visual representation in the minds of consumers:
 - The East Coast Tasmania brand has lots of earthy colours and rock formations and speaks to adventure and travel.
 - The GED brand has the most positive sentiment and visually is most associated with crystal blues and white sands. There is strong association with Wineglass Bay and Freycinet National Park as well as other places to stop along the way.
 - The Great Eastern Wine Drive is the smallest of the brands and is mostly associated with the rustic greens of boutique vineyards and scenic wineries.
- The volume of traffic for the GED is more seasonal than the other brands, with more winter mentions recorded.
- Within the current brand family, East Coast Tasmania is seen as the primary brand, with the Great Eastern Drive and Great Eastern Wine Drive sitting below this. However, the similarities and interchangeability of East Coast Tasmania and Great Eastern Drive mean that these two brands are in competition.
- At the moment, there are too many similarities between East Coast Tasmania and the Great Eastern Drive to provide distinction and clarity for the consumer. They are very much linked in terms of style, content and function, causing confusion.

A full report will be available as a separate document in due course.



Department of State Growth

Parliament Square

4 Salamanca Place

Hobart TAS 7000 Australia

Phone: 6165 6667

Email: Amanda.Aitken@stategrowth.tas.gov.au

Web: www.stategrowth.tas.gov.au