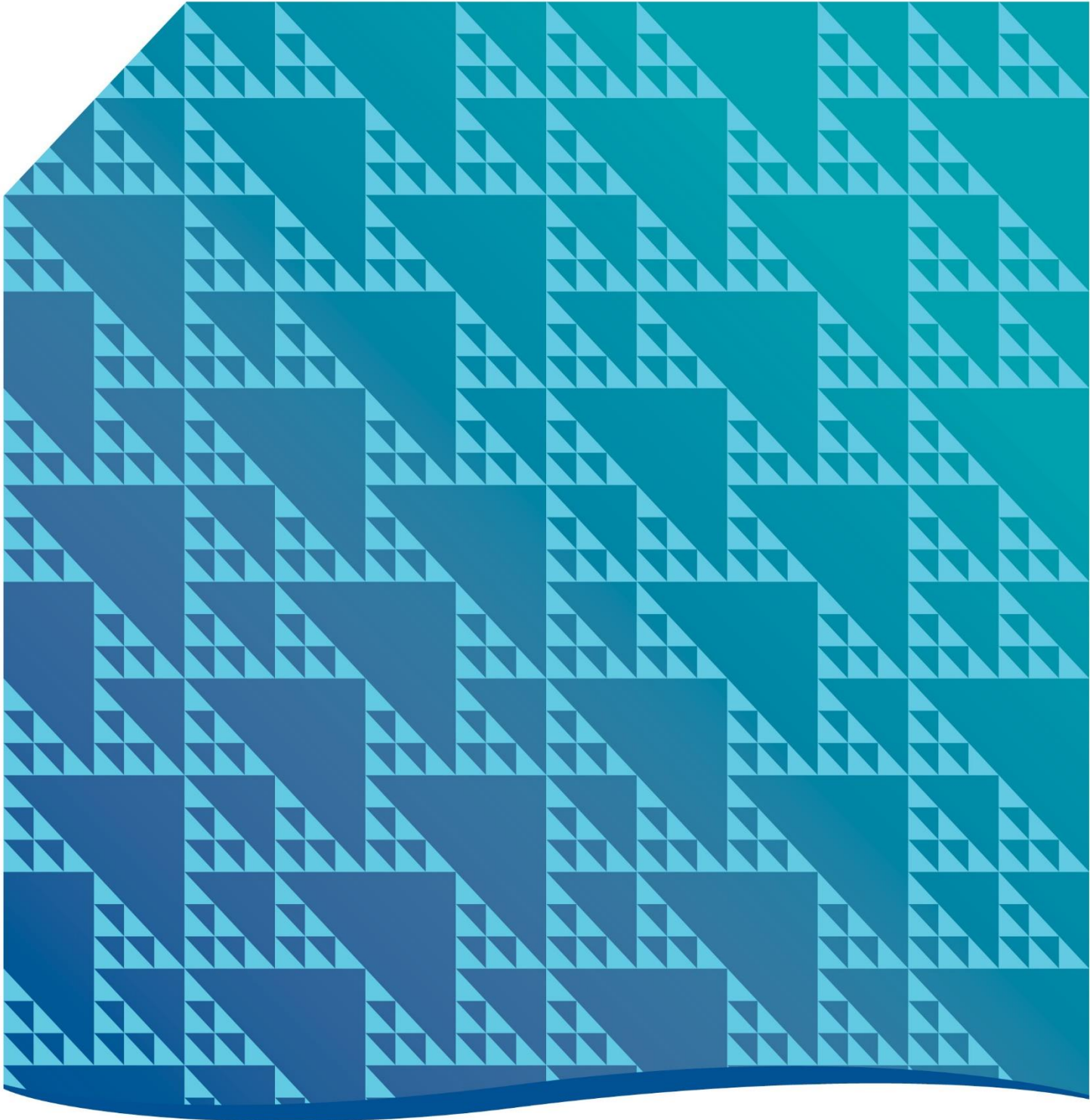


Journeys Project: Consultation Report

December 2019



Contents

Terms and acronyms	1
Executive summary	2
Results by numbers	4
Project background	5
The Journeys Project	5
Self-drive holidays	5
Self-drive holidays in Tasmania	6
Tasmania: Come Down for Air	7
Target consumers	7
Project aims and benefits	7
The three new Journeys background	9
Engagement approach	10
Engagement Plan	10
Stakeholder consultation	10
Additional engagement tools	10
Consultation process	10
Two phases	10
1. Industry Meetings	11
Industry Meetings schedule	11
Industry Meeting format	11
2. Community Forums	12
Community Forums schedule	12
Community Forums format	14
Presentation	15
Survey	17
Direct contact	17
Findings summary	18
General findings about the initiative	18
Findings common to two or more Journey areas	18
Findings unique to the Southern Journey	21
Findings unique to the Central Journey	21
Findings unique to the Journey across the top of Tasmania	21
Themes	22
Recommendations	24
The initiative in general	24

Recommendations unique to the Southern Journey	27
Recommendations unique to the Central Journey.....	27
Recommendations unique to the Journey across the top of Tasmania.....	27
Next steps	28

Terms and acronyms

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

Terms or acronym	Description
ATDW	Australian Tourism Data Warehouse
DAP	Destination Action Plan
The Division	The Cultural and Tourism Development Division (of State Growth)
DST	Destination Southern Tasmania (Regional Tourism Organisation)
ECT	East Coast Tourism (Regional Tourism Organisation)
EV	Electric vehicle
FTE	Full-time equivalent
Grey nomads	Older people, typically retired, who spend time travelling generally in a caravan or motorhome
LTAs	Local Tourism Associations
RTOs	Regional Tourism Organisations
State Growth	Department of State Growth
T21	Tasmanian Visitor Economy Strategy 2015 - 2020
TNT	Tourism Northern Tasmania (Regional Tourism Organisation)
THSU	Tourism and Hospitality Supply-side Unit (of State Growth)
TWWHA	Tasmanian Wilderness World Heritage Area
UNESCO	United Nations Educational, Scientific and Cultural Organization
WxNW	West by North West (Regional Tourism Organisation)

Executive summary

The success of the Tasmanian Government's Great Eastern Drive road trip - a self-drive touring route along Tasmania's East Coast (launched in 2015) - saw the development of a second drive journey in 2018, the Western Wilds. In the 2018-19 Budget the Tasmanian Government committed funds to support an additional three drive Journeys, which established the Tasmanian Journeys Project. The project will deliver five driving experiences (including the Western Wilds and Great Eastern Drive) that encourage people to explore Tasmania so that regional areas benefit from the growing visitor economy.

To ensure the success of the planning, implementation and marketing of the additional three Journeys, the Department of State Growth (State Growth), as the project owner, committed to a thorough consultation exercise with industry and other stakeholders. This Report is about that consultation – what it involved, what findings it delivered and the recommendations that emerged.

A multi-pronged approach to consultation was adopted. At the heart of the approach was a broad stakeholder consultation process which attracted hundreds of participants to a combined total of 21 Industry Meetings (invitation-only events aimed at representatives from relevant Councils, DAP groups, LTAs and other relevant organisations) and Community Forums (public events were open to anyone in the community with an interest in the Journeys project). See 'Results by numbers' below. This work was supported by an Engagement Plan and multiple additional engagement tools, including an online survey that garnered 115 responses State-wide, along with social media content, advertising and website content.

The key finding from this extensive consultation exercise, which ran over several months, is that there is a broad support among stakeholders for the fundamental components of this initiative. This includes:

- Taking a touring holidays approach;
- Promoting areas, rather than linear road trips;
- Dispersal of visitors;
- Core (and different) themes for each Journey;
- Journeys being complementary rather than competitive, and must make sense from a consumer perspective.

There were numerous additional findings from the consultation, many of these related to the implementation of the project and stakeholder engagement, including:

- Intended consumers/audience for the marketing activities;
- How operators could get involved in delivering the project;
- How operators involvement will benefit their own businesses, as well as the wider economy;
- The relationship of the Journeys project with existing and emerging tourism initiatives;
- Supply and demand across the broader visitor economy;
- Hire car availability (including electric vehicles);
- Considerations of sustainable and environmentally minded tourism;
- The need for supporting infrastructure and activity including upgraded road infrastructure and tourism signage.

Useful insights emerged from the consultation around visitor behaviour. This included both the questions that visitors tend to ask when they are in Tasmania as well as how they source their information when making decisions to holiday here. All of this is captured in the Report.

The consultation exercise provided valuable information from stakeholders to help inform the development of themes to promote each of the new Journeys. Possible themes that emerged from the consultation process are shown in the Report and will be refined and developed into propositions for consumer-testing.

Building on the findings, the 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

This Report will be used to shape a new draft of the Tasmanian Journeys Project Strategic Plan, which will include the themes for each of the new Journeys. These themes will be refined and consumer-tested before being developed into visual identities for each Journey.

The Southern Journey Working Group will be convened and work towards launching the Southern Journey before the end of this financial year (2019/20). The Journey across the top of Tasmania will follow in the second half of next year and into 2021, and then the Central Journey will launch towards the end of 2021. Throughout this process State Growth and Tourism Tasmania will continue to work closely with the Regional Tourism Organisations (RTOs), tourism operators and other interested stakeholders.

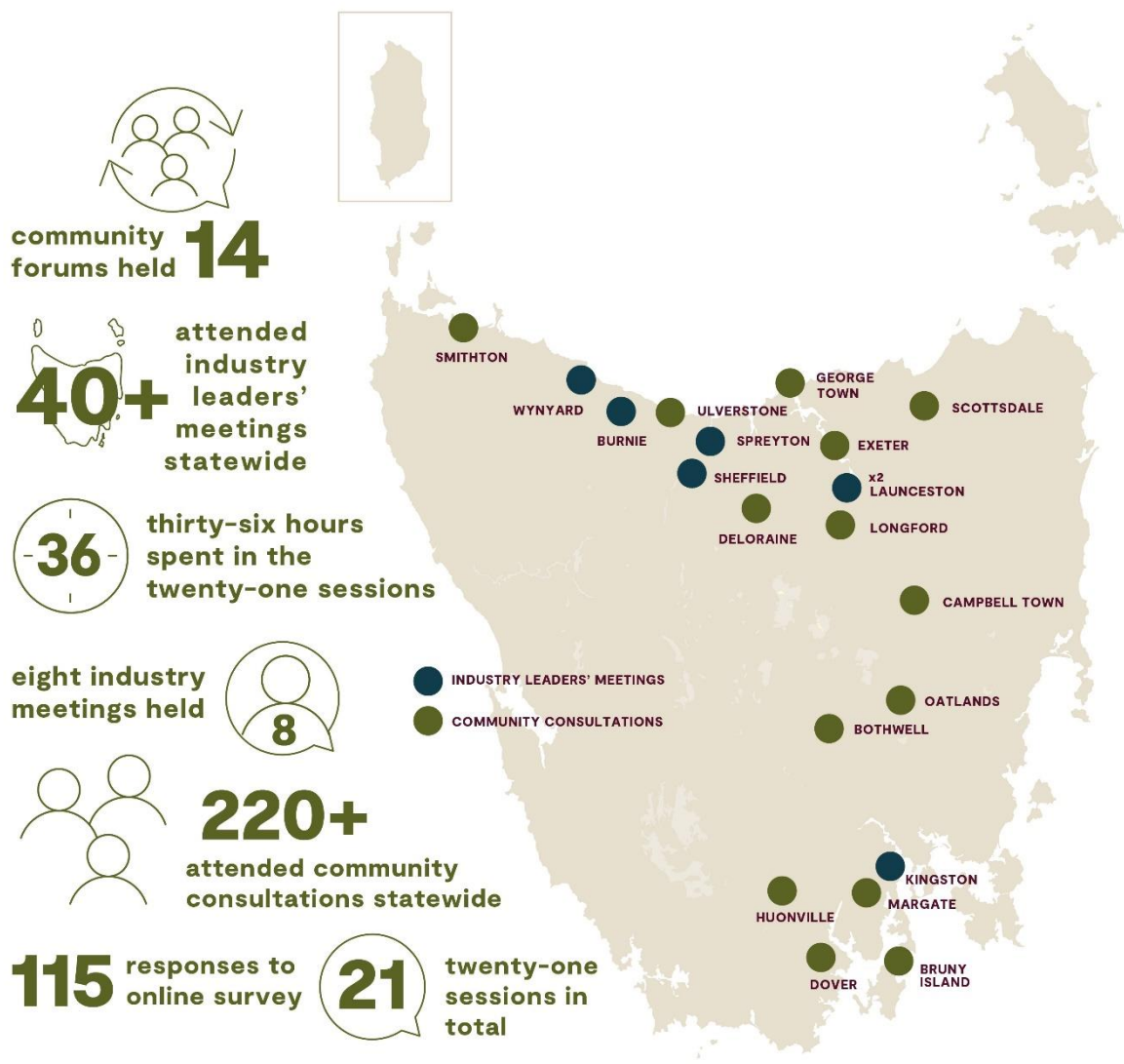
The timing of the expanded Journeys project will be in line with the launch of Tourism Tasmania's new brand, Tasmania: Come Down for Air¹. With its focus on taking a break from the stress and routine of everyday life and its commitment to moving visitors outside of Hobart and beyond the State's popular icons, the overlap of the new brand with the aims of the Journeys Project is clear and advantageous.

These are exciting times for Tasmania in the tourism space, with the state's appeal as a destination extraordinarily high in a local, national and global context. The Journeys initiative plays an important role in Government and industry's 10-year vision (Tourism 2030).

The timing is now right to reinvigorate Tasmania's self-drive offering and to capitalise on competitive advantages including the state's geographical compactness, diverse landscapes and attractions, well distributed visitor entry and exit points and friendly and welcoming Tasmanians.

¹ <https://www.tourismtasmania.com.au/marketing/brand-launch>

Results by numbers



Project background

The Journeys Project

In June 2015 the Tasmanian Government launched the Great Eastern Drive initiative² – a self-drive touring route along Tasmania's East Coast. The initiative was backed by \$500,000 of investment to support the delivery of safety improvements, tourism and directional signage and a national marketing campaign. Since its launch the Great Eastern Drive has successfully contributed to a 20 per cent increase in visitors to Tasmania's East Coast.

The success of the Great Eastern Drive led to the expansion of the initiative to include a second drive called the Western Wilds as part of a 'Journeys Project'. This was launched in October 2018³. Encouraging visitors to explore a broad area rather than a prescribed linear touring route, the Western Wilds is designed to better engage touring visitors as they travel through western Tasmania and support tourism businesses as part of a growing visitor economy in Tasmania.

In the 2018-19 Budget the Tasmanian Government committed a further \$1.4 million to support the planning and implementation of three additional self-drive Journeys under the Journeys Project banner. It is proposed that the design and development of the new Journeys follows 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 route from point A to point B.

The Journeys Project will ultimately deliver a suite of five Journeys across Tasmania, ensuring regional Tasmania benefits from the visitor economy. The intention is for the five Tasmanian 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.

Following the commitment to expand the Journeys Project to include five Journeys, the Department of State Growth (State Growth) and Tourism Tasmania appointed dedicated FTE project resources to look after the planning, implementation and marketing of the Journeys Project.

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

This Report is focussed on the consultation – and associated engagement work – with industry and other stakeholders that took place to support the development of the final three Journeys.

Self-drive holidays

After an extended period of popularity, road tripping fell out of favour as a choice for local, national and international holidays. It was seen by many consumers – and therefore the tourism industry – as being an activity primarily of interest to grey nomads rather than a model for a contemporary family holiday or short break.

Over the past few years however a back to basics cultural shift has resulted in a renaissance of positive attitudes towards road trip vacations. This has transformed self-drive holidays into an area of focus and investment for

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

³ http://www.premier.tas.gov.au/releases/welcoming_visitors_to_the_western_wilds

many countries around the world. This interest extends to Australia, where the race is firmly among the States to create the best road trips and to position themselves as the must visit road trip State.

As well as meeting the needs of a strong cultural shift (and changing market demand), the boom in self-drive tourism also aligns with a strong desire by governments and industry to disperse visitors out of the main metropolitan centres and encourage them to explore further afield in order to support regional economies and spread the benefits – as well as the load – of the visitor economy.



Image Credit: Pete Harmsen

SELF-DRIVE: Exploring further afield in Tasmania. Driving near Kelvedon Beach.

Self-drive holidays in Tasmania

Tasmania has long played in the self-drive touring space. In fact, there have been numerous iterations of Tasmania's self-drive experiences including a series of touring trails and touring routes across the State. This is not surprising. Tasmania has strong competitive advantages for self-drive holidays. It is geographically compact with diverse landscapes and attractions, low population (and traffic loads) and defined and well distributed visitor entry and exit points. Tasmania also has a limited public transport network, particularly between regional areas, which makes self-drive the most logical and attractive option (outside of guided tours) for visitors wishing to travel beyond metropolitan areas.

As mentioned, the Journeys Project will include five distinct yet cohesive and complimentary Journeys around the State. This will provide choice for visitors, prevent unhelpful and unnecessary competition between the Journeys and enable all five Journeys to be linked, for the benefit of all stakeholders and consumers seeking the ultimate exploration of Tasmania.

In order to support the marketing of the Journeys, an over-arching touring positioning will be created that will enable Tourism Tasmania to take the Journeys to market collectively while also being able to dial up and down certain journeys depending on the audience and channel.

Tasmania: Come Down for Air

During the Journeys consultation, Tourism Tasmania launched its new tourism brand, Tasmania: Come Down for Air⁴. The new brand invites travellers to take a break from the stress and routine of their everyday lives and to “feel more human”. Tourism Tasmania Chief Executive Officer, John Fitzgerald, described the new approach as a deliberate departure from traditional destination marketing which was designed to move visitors outside of Hobart and beyond the State’s popular icons, which already attract good visitor numbers⁵. Mr Fitzgerald said the new brand position – which would feature for the next three to five years – would tap into a feeling about what is possible in Tasmania and encourages a “deeper dive into our product and experiences”. Will Hodgman, Premier and Minister for Tourism, Events and Hospitality underlined that the new brand was part of a broader commitment to boosting visitation into regional areas to ensure more Tasmanians benefit from the visitor economy⁶.

The relevance of the new brand position to the Journeys Project is clear. With its focus on dispersal and diverse Tasmanian-flavoured experiences, Tasmania: Come Down for Air provides an outstanding opportunity for the Journeys project to align with this larger marketing effort.

Target consumers

Both Tasmania: Come Down for Air and the Journeys project are marketing platforms intended to tap into the needs of the two main target consumers segments identified by Tourism Tasmania: 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 NSW and Victoria. Also a strong proportion of sea-change retirees in regional areas.

Project aims and benefits

The overarching strategic objective of the Tasmanian Journeys Project is to sustainably grow yield, dispersal and length-of-stay into regional areas.

The Great Eastern Drive has been successful in this regard and has served as the inspiration for the entire Journeys program. It has done so with a proposition that is largely linear, based on a road that runs the length of the East Coast. The Western Wilds evolved this success into a journey intended to be less prescriptive and linear –

⁴ <https://www.tourismtasmania.com.au/marketing/brand-launch>

⁵ <https://www.themercury.com.au/news/opinion/tasmania-holidays-why-the-state-has-to-keep-selling-itself/news-story/207b50de8ba6723392471c79d66f11a1>

⁶ http://www.premier.tas.gov.au/releases/tasmania_come_down_for_air_campaign_launched

one that encourages visitors to undertake regional exploration of the wilderness and human stories of Tasmania's West, rather than travel the length of a prescriptive, pre-determined route. This change in approach is based on research insights and current consumer behaviour that identifies that visitors are not looking for a fixed touring solution, but rather the insights and tools to shape an experience their way.

It is proposed that the remaining three Journeys follow the model of the Western Wilds by establishing complementary visual identities and themes that promote explorative self-drive touring within an area, rather than experiences based on prescriptive, linear routes. Whilst the Great Eastern Drive was established under the linear model, there is potential to evolve its positioning to include peripheral and adjacent locations in line with the proposed approach for the other Journeys.

A more holistic approach has the most potential to achieve the project objectives of yield and dispersal and deliver benefits across the island beyond the metropolitan areas of Hobart and Launceston.

In addition, the recommended approach provides a seamless and cohesive experience for consumers that is easily accessible from metropolitan entry and exit points.

In terms of sequence of delivery for the rest of the Journeys project, there are actually four Journeys to progress. The Southern Journey will be next cab off the rank, with the launch of that Journey by early June 2020. Concurrently, work will begin with ECT in relation to how best to spend the allocated funding from the Journeys project budget in the continued evolution of the Great Eastern Drive. It is also anticipated that this will be complete in 2020.

The Journey across the top of Tasmania will follow in the second half of 2020 and into 2021. And finally, the Central Journey will launch towards the end of 2021.

Engagement approach

Engagement Plan

To support engagement around the Journeys project, a Key Stakeholder and Industry Engagement Plan was developed, moving through iterations in an agile way in response to the evolution of the Project and the expressed needs of stakeholders. This internal document guided the Project Team's strategic and operational thinking and activities around engagement. It included engagement objectives (see above), target audiences, messaging, methodology, an action plan, reporting and evaluation, and a budget.

Stakeholder consultation

At the heart of the engagement approach was a broad stakeholder consultation process. This Report is concerned primarily with that consultation process as well as the findings and recommendations that flowed from it. For this reason, a separate section outlining the approach to stakeholder consultation is included below.

Additional engagement tools

A range of other engagement tools were utilised to support engagement around the Journeys Project including stakeholder meetings, use of social media and e-newsletters, creation of a Journeys landing page on the State Growth website, advertising and media coverage. All played a part in supporting the delivery of the stakeholder consultation piece, which, as stated, is the focus of this Report.

Many of these engagement tools are likely to continue in use beyond the stakeholder consultation as part of the broader Stakeholder and Industry Engagement Plan for the entire Journeys Project.

Consultation process

The stakeholder consultation process was conducted across two principal phases engaging with multiple stakeholders around the State over several months. It included Industry Meetings with leaders and an extensive round of Community Forums, underpinned by a well-researched presentation. This was all backed by an online survey with opportunities for further direct engagement in the project development.

Details of the stakeholder consultation process are below. The Findings and Recommendations flowing from the consultation process are set out in subsequent sections of this Report.

Two phases

The stakeholder consultation was undertaken in two phases which overlapped.

Phase one was Industry Meetings with Councillors, Council representatives and group leaders from Destination Action Plan (DAP) groups/ Local Tourism Associations (LTAs) and other relevant organisations. Phase two involved Community Forums aimed primarily at tourism business operators, industry representatives, community representatives and local community members (although they were open to anyone with an interest). Both phases were supported by a presentation from State Growth and Tourism Tasmania along with an online survey and opportunities for direct contact with the Project Team.

1. Industry Meetings

A total of eight Industry Meetings were delivered across the State between June and September 2019. These invitation-only events were aimed at representatives from relevant Councils, DAP groups, and LTAs and other relevant organisations (e.g. the Cradle to Coast Tasting Trail Committee).

The meetings amounted to eight hours of face-to-face consultation. In total 45 people attending the eight events. The largest meeting was at Kingston and attracted 13 people. The smallest meeting was at Stanley for the Circular Head Tourism Association with one person.

The Industry Meetings schedule is set out in the table below.

Industry Meetings schedule

Date	Participant details	Location	Journey
Thursday 15 August, 1-2.30pm	Tourism Northern Tasmania DAP and LTA representatives.	TNT offices, Level 1, Suite 1/63-65 Cameron St, Launceston	Journey across the top of Tasmania, Central Journey
Friday 16 August, 2-3pm	Council General Managers (various)	Launceston Town Hall, 18-28 St John Street, Launceston	Journey across the top of Tasmania, Central Journey
Tuesday 20 August, 9.30-11am	Southern Trove Reference Group	Kingborough Community Hub, Goshawk Way, Kingston	Southern Journey
Tuesday 20 August, 4.30-5.45pm	Cradle to Coast Tasting Trail Committee	Spreyton Fresh Cidery, 6 Melrose Rd, Spreyton	Journey across the top of Tasmania
Tuesday 24 September, 9.30-10.30am	North West tourism leaders	Council Chambers, 21 Saunders Street, Wynyard	Journey across the top of Tasmania
Tuesday 24 September, 11.30am-12.30pm	North West Council General Managers	Burnie City Council, 80 Wilson Street, Burnie	Journey across the top of Tasmania
Tuesday 24 September, 2.30-3.30pm	North West tourism leaders	Council Chambers, 69 High Street, Sheffield	Journey across the top of Tasmania, Central Journey

Industry Meeting format

Each Industry Meeting followed essentially the same format as set out in the table below.

Time: One to 1.5 hours

ACTIVITY	WHO	DETAILS	COMMENTS
Arrival	Participants	Time for people to turn up, find a seat, get tea etc. Allows for latecomers.	
Welcome	RTO rep	<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. <ol style="list-style-type: none"> Sharing information with you. Gathering information from you. Explaining the next steps to you. Summary of agenda and confirm end time. 	Setting the direction
Presentation	Amanda, Pete	<ul style="list-style-type: none"> PowerPoint and commentary – project background and marketing context, proposal for new Journeys, potential themes, proposed format of Community Forums. 	Some questions asked during.
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. 	Back and forth.
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 out the session.

2. Community Forums

A total of 14 Community Forums were delivered across the State between August and October 2019. These public events were open to anyone in the community with an interest in the Journeys project.

In total 221 people attending the 14 events. The largest forum was at Huonville and attracted 50 people. The smallest forum was at Scottsdale with 2 people. The Community Forums cumulatively amounted to more than 28 hours of face-to-face consultation across the State.

The Community Forums schedule is set out in the table below.

Community Forums schedule

Date and time	Participant details	Location	Journey
Tuesday 27 August, 10.30am-12.30pm	Operators, industry and community representatives, local community members	Channel Museum, 1755 Channel Hwy, Margate	Southern Journey

Tuesday 27 August, 4-6pm	Operators, industry and community representatives, local community members	Bruny Island Winery, 4391 Bruny Island Main Rd, Lunawanna	Southern Journey
Wednesday 28 August, 10.30am- 12.30pm	Operators, industry and community representatives, local community members	Dover RSL, 16 Chapman Ave, Dover	Southern Journey
Wednesday 28 August, 2.30-4.30pm	Operators, industry and community representatives, local community members	Huonville Library, 1 Skinner Dr, Huonville	Southern Journey
Tuesday 3 September, 10.30am-12.30pm	Operators, industry and community representatives, local community members	Oatlands Community Hall, 1 Gay Street, Oatlands	Central Journey
Tuesday 3 September, 3-5pm	Operators, industry and community representatives, local community members	Longford Memorial Hall, 55 Wellington Street, Longford	Central Journey/ Journey across the top of Tasmania
Wednesday 4 September, 10.30am-12.30pm	Operators, industry and community representatives, local community members	The Grange Meeting Rooms, 4A Commonwealth Lane, Campbell Town	Central Journey
Wednesday 4 September, 2.30- 4.30pm	Operators, industry and community representatives, local community members	Ratho Farm, 2122 Highland Lakes Road, Bothwell	Central Journey
Monday 14 October, 4-6pm	Operators, industry and community representatives, local community members	Tall Timbers Tasmania, 5/15 Scotchtown Rd, Smithton	Journey across the top of Tasmania
Tuesday 15 October, 10.30am-12.30pm	Operators, industry and community representatives, local community members	Ulverstone Rec Centre, Flora Street, West Ulverstone	Journey across the top of Tasmania
Tuesday 15 October, 2.30-4.30pm	Operators, industry and community representatives, local community members	Empire Hotel, 19 Emu Bay Road, Deloraine	Journey across the top of Tasmania / Central Journey

Wednesday 16 October, 10.30am-12.30pm	Operators, industry and community representatives, local community members	Exeter Community Hub, 10 Murray St, Exeter	Journey across the top of Tasmania
Wednesday 16 October, 2-4pm	Operators, industry and community representatives, local community members	George Town Hub, 12 Elizabeth Street, George Town	Journey across the top of Tasmania
Thursday 17 October, 10.30am-12.30pm	Operators, industry and community representatives, local community members	Scottsdale Library, 51 King St, Scottsdale	Journey across the top of Tasmania

Community Forums format

Each Community Forum followed essentially the same format as set out in the table below. This format was altered slightly, if necessary, depending on the size and interests of the group, and especially the amount of time required to respond to questions.

Time: Two hours in total

ACTIVITY	WHO	DETAILS	COMMENTS
Arrival	Participants	Time for people to turn up, find a seat, get tea etc. Allows for latecomers.	
Icebreaker	Leigh	Exercise chosen depending on group size, dynamic, location etc.	Relaxing and group bonding.
Welcome	RTO rep	<ul style="list-style-type: none"> Introduce the Project team and welcome participants. Hand over to Leigh to explain the session. 	Formal introduction
Plan for the session	Leigh	<ul style="list-style-type: none"> Acknowledgment of Country. Thank you for coming and introduce myself. Aims of the session. <ol style="list-style-type: none"> Sharing information with you. Gathering information from you. Explaining the next steps to you. Summary of agenda and confirm end time. 	Setting the direction
Ground rules	Leigh	<ul style="list-style-type: none"> Introduce the session tools: <ol style="list-style-type: none"> Conduct guidelines. Car park tool. Possum tool. 	Setting the tone
Presentation	Amanda, Pete	<ul style="list-style-type: none"> PowerPoint and commentary – project background and marketing context, proposal for new Journeys, potential themes. 	Questions held until the end.

Q&A	Amanda, Pete, Leigh	<ul style="list-style-type: none"> • Leigh to take all the question from the floor and write on the whiteboard. • Amanda and Pete answer all the questions (order guided by Leigh, allowing follow ups from the floor as appropriate). 	Back and forth with Leigh controlling the flow and time.
Exercise 1: How do your customers and visitors behave?	Leigh	<ul style="list-style-type: none"> • Exercise to gather information from the participants on how customers and visitors to the local area behave. • The question is written up in advance on the whiteboard supported by guiding sub-questions. 	Multiple perspectives and diverse views. Uncovers themes and insights into consumer on-ground behaviour.
Exercise 2: How can you support the initiative?	Leigh	<ul style="list-style-type: none"> • Question provided to the group to answer individually. • Group scoring and/ or sharing depending on time. 	Develops buy-in. Exercise is cut if time is running out.
Exercise 3: My area is great for self-drive touring holidays because...	Leigh	<ul style="list-style-type: none"> • Statement provided to the group to answer individually. • Participants to answer the question in 16 words, then edit back to 8 if time allows. • Group sharing depending on time. 	Highlights the best of each area. Useful for marketing and refining themes.
Thank you from the facilitator	Leigh	<ul style="list-style-type: none"> • Quick thanks to participants for attending. 	Closes out the session.
Next steps	Amanda	<ul style="list-style-type: none"> • Thank the group. • Confirm next steps. • Provide contact details. 	Places the session in a bigger context and brings future focus.

Presentation

The Journeys team developed a presentation which was delivered at both the Industry Meetings and Community Forums. This presentation was tailored to each audience and area with content (imagery and text) relevant to the area in which it was being delivered. Given some locations potentially straddled multiple Journey areas, the presentation focused on all relevant Journeys: Launceston, Sheffield, Deloraine and Longford (Journey across the

top of the State with the Central Journey). The Industry Meetings presentations were shorter (due to higher level of existing knowledge). They also invited input into the content of the Community Forums. The Community Forums presentations were longer and contained more explanatory information about the Project's development and the evolution of the thinking around the marketing and development of the footprint proposal.



Image Credit: Leigh Arnold

PRESENTATION: Community Forums across the State: Deloraine

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

Setting the scene

- How the Journeys Project links to T21.
- Journeys as touring holidays including dispersal of visitors, exploratory, core theme/s, geographical area linked to an entry/exit port, multiple stops en route each day.

The Journeys project in context

- Includes five Journeys. Builds on existing Great Eastern Drive and Western Wilds.
- Objectives: Yield and dispersal and positioning Tasmania as a world-class self-drive touring destination.

Marketing

- Tasmania's competitive advantage lies in the touring holidays space. Experiential breadth and depth, and the diversity and proximity of experiences. Leading global example is New Zealand.
- Competitive analysis was undertaken in relation to the categories of self-drive touring and where Tasmania's competitive advantage lies.
- Highlighting possible themes that may be used for the Journeys: Adventure, history, food and drink, etc.
- Tasmania's self-drive touring proposition.

Details of the proposal for each new Journey

- Tailored information setting out current thinking on the Southern, Central and Journey across the top of the State.

- Proposed area.
- Entry points.
- Themes under consideration.
- Advantages of the model
 - Easy for consumers to understand.
 - Yield and dispersal.
 - Avenue for cooperation and collaboration.
 - Enables grouping of varied products.
 - Increases awareness.
 - Cohesive and broad offering.

Invitation for questions

- Delivered through a facilitated Question and Answer session (see forum schedule above).

Survey

An online survey was developed to seek feedback from industry and the wider community to provide a second avenue for providing input in relation to on-ground consumer insights and key themes.

The survey went live on Friday 11 October 2019 and closed on Monday 11 November 2019. A total of 115 responses received. The survey questions are provided as Appendix C.

The survey was promoted on the State Growth Journeys landing page, through Tourism Tasmania's industry newsletter *Tourism Talk*, and by the RTOs in their e-newsletters. In addition, everyone who registered to attend, or physically attended either a meeting or forum, or had expressed interest in the project but were unable to attend a meeting or forum were emailed the survey link directly.

Direct contact

The Project Manager's contact details were provided at the end of the Industry Meetings and Community Forums and attendees were encouraged to contact her directly should they have further information to provide.

Findings summary

General findings about the initiative

Broad support

There was very broad support across the Industry Meetings, Community Forums and online survey for the fundamental components of the initiative:

- Adopting a touring holidays approach.
- Taking an area rather than linear approach in line with the Western Wilds model, and the potential footprints identified.
- Dispersing visitors away from the main roads and metropolitan areas into regional areas.
- Having core (and different) themes for each Journey as the point of difference.
- The Journeys being complementary and not competitive, and the need for them to make sense from a consumer perspective.

External factors

There are numerous actions and programs which the Journeys initiative is not responsible for but on which its success potentially depends (to varying degrees). This includes but is not limited to, the upgrading of roads, having sufficient hire cars, the impact of the sharing economy (especially Airbnb), and the coming online of the new Spirit of Tasmania vessels.

Supply and demand

It will be very important to strike a balance between bringing more visitors into the regions and ensuring the market is sufficiently well developed to cater for them (for example accommodation, facilities and attractions).

Some scepticism and confusion

There was some limited scepticism and confusion. The scepticism tended to come either from an attitude of favouring the status quo ("if it ain't broke don't fix it") or misgivings about delivering the initiative (perhaps based on previous initiative frustrations). This confusion was often around the concept of touring holidays as opposed to more traditional linear routes. Helping understanding around this appeared to resolve most concerns.

Engagement and disengagement

People who attended either the Industry Meetings and/or the Community Forums tended to appreciate and enjoy the experience. Many appeared genuinely grateful that a two-way conversation was being conducted. On the flip side, numbers at some of the events could have been higher. As a result, some stakeholders may later object to having not been properly consulted even though opportunities were made available.

Findings common to two or more Journey areas

Areas covered

Participants around the State had a strong desire to know the geographical area of each Journey.

Being overlooked

There were concerns in every region about particular locations being “overlooked” in the marketing effort and therefore by visitors.

There was a unique concern in Deloraine of being overlooked as a result of potentially falling between two Journey footprints.

Some attendees in Smithton expressed concerns around the far North West potentially “missing out again”. After the Community Forum, WxNW continued the conversation with those stakeholders and they are now supportive of the proposal as presented in October.

Existing initiatives

Many people expressed a view that Journeys should complement and not replace existing initiatives, with the Cradle to Coast Tasting Trail being mentioned on more than one occasion. Amanda provided reassurance that the Cradle to Coast Tasting Trail and other current initiatives such as the Tamar Valley Wine Route would not be replaced and rather they would be included as premium products within a broader Journey footprint.

Marketing focus

There was a strong interest in the precise details of what the marketing would be and how it would work.

Signage

There was broad concern around signage to support the initiative and this fell into four areas:

1. Having enough signage away from the main thoroughfares (i.e. not just on the main roads).
2. What signage would be installed and what signage removed?
3. Making it easier for operators to produce their own signage (with templates and less red tape).
4. Having clarity on who would pay for the new signage.

Driver safety

Concerns were expressed in multiple locations about road safety arising from drivers being unused to Tasmanian conditions, including navigating unsealed roads.

Environmental impact

There was a high level of interest in the environmental impact of a self-drive touring initiative. This represents a risk to the initiative if ignored, but also an opportunity to be pursued by positioning Tasmania as a ‘clean and green’ self-drive touring destination.

Sustainable tourism/ over-tourism

There was a high level of interest among stakeholders in this initiative contributing to sustainable tourism (and not creating over-tourism). This represents a risk to the initiative if ignored and may result in the converse risk of ‘under-tourism’ resulting from visitors being disappointed and spreading that by word of mouth. There is a strong opportunity to be pursued by positioning Tasmania as a sustainable self-drive touring destination.

Hire car issues

There was broad concern around hire cars, and this fell into three primary categories:

1. Are there enough hire cars available to support a self-drive touring initiative?
2. Can hire car companies make more electric vehicles available?
3. Will all hire car companies in Tasmania allow users to travel on unsealed roads?

More than cars

Numerous participants argued that Journeys marketing should not be targeted solely at car drivers but also those interested in walking, cycling and motorbike holidays as well as existing tour operators.

Road infrastructure

Funding to seal roads and to develop pull in bays was asked about very frequently.

Tasmanian visitors

It was noted on several occasions that Journeys could and should be targeted at Tasmanian tourists (and not just mainlanders and international visitors).

Services being open

Many people commented on businesses being closed when visitors arrived (either in the evenings or in the off-peak seasons).

Travel times

It was frequently noted that many tourists wrongly believed they could see the entire State in couple of days.

Shoulder seasons

Numerous people wanted to know if the initiative would help with the off-season, especially winter.

Contact with the locals

It was very frequently observed that visitors and customers greatly appreciated interaction with and advice from the friendly locals.

Visitor infrastructure

There was some concern over whether the initiative would be supported by sufficient visitor infrastructure such as barbecues, rubbish bins and toilets.

Indigenous Tasmanians

Several people in different parts of the State spoke about the need to promote the stories of Tasmanian Aborigines as part of the initiative.

Relax and unwind

Many people identified how visitors come to relax and unwind in Tasmania and escape from the monotony and pressure of everyday life elsewhere.

Cost to operators

There was wide interest in whether the initiative would cost operators anything, including for marketing.

The timeframe for rollout

Interest in this was nearly universal. No one objected to the timeframe of full implementation by 2021 or that the Southern Journey would be the 'next cab off the rank'.

Getting involved

There was strong interest in all three regions around staying involved in shaping the initiative.

Measuring and evaluating

There was an interest in how the benefits of the initiative would be measured and it was stated that this would be done through the Tasmanian Visitor Survey, Mobilewalla and Tourism Tracer.

Cooperative approach

Many participants were enthusiastic about working cooperatively to market their regions under the initiative.

Findings unique to the Southern Journey

Waterways

There was a strong interest in the Southern Journey area in including water-based activities as a core pillar of the marketing.

The southernmost point

Inclusion of the southernmost point in marketing material was very important for some in the Southern Journey area.

Findings unique to the Central Journey

Heritage Highway

There appeared to be no resistance to the possibility of dropping the 'Heritage Highway' name in favour of marketing that promoting regional exploration, particularly given the original Heritage Highway as a concept is very different now due to changing roads and bypassed towns.

Heritage Heart

A name of "Heritage Heart" was proposed for the Central Journey, capturing elements like "a heart shape within Tasmania", "drinking whiskey warms the heart" and "the agricultural heart".

Ancestry

While it was not surprising that history and heritage was a strong theme in the Central Journey, it was interesting that ancestry hunting appeared to be a popular activity for visitors.

Gardens and landscapes

Gardens and local landscapes emerged as a possible drawcard for visitors to Oatlands like flower beds and trails across town and between neighbouring villages.

Findings unique to the Journey across the top of Tasmania

What about the North West?

Some in the North West were keen to know if a specific North West Journey would be created and felt that should the Journey across the top of Tasmania include the North West then the North West would "miss out again". Subsequent conversations between those stakeholders and WxNW has resulted in these stakeholders now being supportive of the proposal as presented in October.

What comes from the land

A theme of “the land and what comes from the land”, including agriculture, wilderness and nature, seemed to resonate strongly in the North West.

Not just food

There was concern that food and drink was not an ideal theme for the North West – alternative suggestions included the excellent air quality and the northerly facing view of the water.

Lack of confidence in product

There was a noticeable lack of confidence that the product on offer in the North West was of sufficient quality and quantity to draw visitors away from the North.

Quirky attractions

Some in the North West welcomed the possibility of promoting unusual activities and attractions as a drawcard, from the sell-out Acoustic Life of Sheds initiative to hyper-local attractions like gnomes in trees at Sisters Beach.

Airlines, airports and TT Line

There was also a call for greater support from the airlines, northern airports and TT Line to direct more people into the region and in particular the North West.

The far North East

A participant in Scottsdale noted the need to ensure the inclusion in the initiative of the “the North East corner” beyond Scottsdale, adding that there was a lot of high-quality product in that region.

Themes

For this Report, a detailed analysis was conducted of the discussions from across the Industry Meetings, the Community Forums and the online survey around the potential themes for the Southern, Central and Top Journeys. The conclusions from this analysis are provided below.

Potential themes for the Southern Journey

The following themes are proposed for the Southern Journey based on the consultation insights:

1. The great outdoors (wildlife, nature-based activities, southern Aurora, phosphorescence).
2. Waterways: Rivers, islands, inlets and hidden coves.
3. The edge: The southernmost point, the end of Australia, wilderness, between urban and wild.
4. Uncover history: French connections and Indigenous history, colonial past.
5. Food and drink (produce, Huon Valley, food and wine).
6. Slow environmental tourism: Disconnect, stay, enjoy the raw simple pleasures in life in a sustainable way.
7. Being active (sailing, surfing, bike riding and action sports).

Potential themes for the Central Journey

The following themes are proposed for the Southern Journey based on the consultation insights:

1. Colonial heritage and history.
2. Nature and wilderness: National parks and walks, alpine wilderness, agriculture.
3. Hidden gems: Nooks and crannies, lanes and byways, shops, food, friendly locals, whisky, cycling trails.
4. Peace and quiet: Parking is easy, no traffic lights, winding country drives, fishing.

5. Unexpected and pleasant: Conversations with locals, the slower pace of life, nature, heritage and being in “the middle of nowhere, the centre of everywhere”.
6. Food and beverages: Including the good service, recommendations and local produce.

Potential themes for the Journey across the Top of Tasmania

The following themes are proposed for the Journey across the Top of Tasmania based on the consultation insights:

1. The land and what comes from the land: Including agriculture, wilderness, created from chaos (geology).
2. Food and drink: Wine and food tours; food, booze and views; wineries, strawberries, fishing.
3. Quirky: Find different, e.g. Acoustic Life of Sheds, gnomes in trees, alpacas.
4. Naturally good: “Take off your mask”; breathe the world-class air quality; drink in the water and the northerly facing view of the sea; slow down and rest your heart, mind and soul; waterfalls and caves.
5. Adventure: Mountain biking, great outdoors, good swimming beaches, cycling, windsurfing, coastal walks.
6. History and heritage.

Universal themes for all of the Journeys

The following themes are proposed as universal themes for the Journeys based on the consultation insights:

1. Slow, environmental self-drive tourism.
2. The quality of the friendly welcome by Tasmanian locals.
3. The great diversity of product in a small geographical area.



RELAX: Taking a break from the stress and routine of everyday life. Spring Beach, Orford.

Recommendations

The initiative in general

Engagement

Continue to build on the goodwill generated by the Industry Meetings and the Community Forums by sharing further information with stakeholders as the project unfolds, including via:

- Further Industry Meetings (updates)
- The industry development program (see below)
- Website
- E-Newsletters

External factors

Continue to ensure the initiative is rolled out in a way that minimises risks associated with external factors like the upgrading of roads, general visitor infrastructure and hire cars, in at least the following two ways:

1. Managing expectations around these issues and the Journeys Project's capacity to shape them.
2. Working to positively influence these factors in a beneficial direction (see more below).

Supply and demand

Develop a supply-side strategy to ensure a balance between bringing more visitors into the regions and having a market sufficiently well developed to cater for them, particularly in light of the new Spirit of Tasmania vessels due to come online in 2021.

Further meetings

Offer further Industry Meetings after the consultation Report is complete and circulated. Use this as an opportunity to update on how regions are not being overlooked, the future of existing initiatives, project timeframes and marketing.

Marketing

Consider all of the findings when determining the content of marketing including, but not limited to, themes, the target audiences, the methods/tools to be used, the environmental credentials of the initiative, travel times and itineraries, the role of 'locals' in the promotional collateral and the shoulder seasons.

Ensure also that stakeholders are kept up to date on the plans for and roll out of the marketing activities.

The Journey areas

At the earliest date possible, confirm and communicate the proposed areas for each Journey including with a map to depict this visually. Use this as an opportunity to check in that stakeholders feel reassured about not being overlooked by the initiative.

Signage

Consider how best to manage signage associated with the initiative. This could be a mixture of:

1. Communicating how signage will be managed (implementation, removal and funding).

2. Providing operators with a webpage where they can easily access information and resources to create, pay for and install their own properly branded signage (see Visit Scotland as an example⁷.)

Driver safety

In conjunction with State Growth's Road User Services team, consider creating a short video in collaboration with the airlines and TT Line about what to expect on Tasmanian roads, to be shown en route prior to arrival.

Hire cars

Communicate with hire car companies around:

1. Fleet supply and demand.
2. Electric vehicles (see below).
3. Allowing users to travel on unsealed roads.
4. Safety and driving conditions information provision to customers.

Progress from these discussions should be shared with stakeholders and promoted as part of the marketing work.

Electric Vehicles (EVs)

1. Work with the Office of Climate Change in relation to electric vehicles and their inclusion within the Journeys Project, particularly around charging networks across tourism operators to ensure EV users can get off the beaten track without fear of being stranded.
2. Communicate with hire car companies around the level of interest in EVs in Tasmania and ideally partner with them to strategically encourage the use and availability of EVs.
3. Promote the use of EVs through Journeys marketing efforts.

EV charging stations

1. Communicate with all levels of government and other organisations responsible for the development and installation of EV charging stations around the demand for these in Tasmania, particularly for tourists.
2. Promote the PlugShare app⁸ (or similar) to visitors through Journeys marketing efforts.

Sustainable tourism/ over-tourism

Contribute to the development of or leverage off an existing State Government sustainable tourism strategy in line with Tourism Tasmania's next 10-year vision Tourism 2030.

Environmental focus

In addition to EVs, explore how to promote carbon neutral self-drive touring and carbon-offsetting partnerships with operators, airlines and TT-Line.

More than cars

Explore how the Journeys marketing can be actively targeted at people interested in walking, cycling and motorbike holidays as well as at (smaller) existing tour operators.

Travel times

Market approximate travel times so visitors better understand how long is needed to see Tasmania.

⁷ <https://www.visitscotland.org/supporting-your-business/advice/brown-tourist-signs>

⁸ <https://www.plugshare.com/>

Tasmanian visitors

Consider targeting Journeys marketing at Tasmanian tourists as a growth market and perhaps doing so with a sustainable holidaying component: travel local for less environmental impact (as is happening more frequently in Europe with the switch from plane travel to train travel⁹).

Services being open

Be clear in marketing around what is **not** available, including that eateries may close early.

Visitor infrastructure

Conduct an audit of visitor infrastructure such as barbecues, rubbish bins and toilets and share and act on the findings.

Indigenous Tasmanians

The Project Manager, as part of the consultation process, has had an initial meeting with the Tasmanian Aboriginal Centre, to explore how best to encourage and incorporate Aboriginal content within the Journeys program. Efforts to liaise with Indigenous Tasmanian groups should continue, to explore further how to promote the stories of Tasmanian Aborigines as part of the initiative.

Getting involved

Maximise the interest shown by participants for staying involved by communicating how that can happen including through Working Group participation, industry training (see below), liaising with RTOs to promote their business as part of the marketing activities, and receiving Journeys-related communications.

Industry training

Create and roll out an industry development program providing education and training for the industry to help them maximise the benefits of the initiative.

This should be developed in partnership with the RTOs and Tourism Tasmania.

Consider including the North West in addition to the South in the initial roll out of the training program, so that the North West region can be supported even while planning and launching the Southern Journey.

Consider ensuring that the industry training covers at least the following:

1. The goals of the initiative.
2. The initiative timeframes (reminder).
3. The roles and responsibilities of operators to maximise return from the initiative.
4. How operators can work together to lift each other up through the Journeys initiative.
5. How operators can help solve the bypass town issue.
6. Opening hours to meet demand and using more subtle 'Closed' signs during off-peak.
7. The cost to operators of being involved, including marketing.
8. How to market your business: e.g. Google ads and using Journeys collateral.
9. Explaining other government funding and initiatives aimed to:
 - a. Improve the visitor road network.
 - b. Promote winter tourism.
10. How the benefits of the initiative will be measured and how you can help.

⁹ <https://time.com/5641390/europe-train-air-travel/>

Recommendations unique to the Southern Journey

Waterways

Consider marketing water-based activities as a core pillar of the marketing around the Southern Journey – i.e. encouraging travellers to get *out* of their cars and onto the water.

The southernmost point

Explore including the southernmost point in marketing material for the Southern Journey.

Recommendations unique to the Central Journey

Heritage Highway

Meet with the Heritage Highway Tourism Region Association to discuss the evolution of the Heritage Highway concept.

Heritage Heart

Consider whether “Heritage Heart” might be a good name for the Central Journey.

Ancestry

Explore how or if ancestry hunting should form part of the marketing for the Central Journey as part of a broader history and heritage theme.

Gardens and landscapes

Explore how or if gardens and local landscapes might serve as a possible drawcard in marketing.

Recommendations unique to the Journey across the top of Tasmania

Managing North West stakeholders who feel they may “miss out”

Continue to highlight the power of collaboration across the proposed footprint and the benefits of having multiple entry/exit ports within the proposed footprint. Continue working with WxNW to promote the initiative and its benefits to these stakeholders and encourage them to actively participate through collaborative efforts.

What comes from the land

For the Journey across the top of Tasmania consider employing “the land and what comes from the land” as a theme in addition to food and drink.

Quirky attractions

Consider promoting unusual activities and attractions as a drawcard from the sell-out Acoustic Life of Sheds initiative to hyper-local attractions like gnomes in trees at Sisters Beach.

Airlines and TT Line

Continue to explore with the airlines, northern airports and TT Line what marketing can be done to direct visitors to the North West.

The far North East

Consider and communicate how the “the North East corner” will be included in the initiative.

Next steps

The closing of the online survey on 11 November 2019 signalled the end of the Tasmanian Journeys consultation process. The insights gained from both the Industry Meetings and Community Forums as well as the online survey have now been gathered together in this Report.

This Report will assist in the development of the new Journeys going forward and will be incorporated into the next draft of the Journeys Strategic Plan.

The themes for each of the new Journeys will be refined and consumer-tested before being finalised and they will form the basis for developing the individual Journey visual identities.

The Southern Journey Working Group will be convened in December 2019 with a view to launching the Southern Journey before the end of the 2019/20 financial year.

Concurrently, work will begin with ECT in relation to how best to spend the allocated funding from the Journeys project budget in the continued evolution of the Great Eastern Drive. It is also anticipated that this will be complete in 2020.

The Journey across the top of Tasmania will follow in the second half of next year and into 2021. And finally, the Central Journey will launch towards the end of 2021.

State Growth and Tourism Tasmania will continue to work closely with the Regional Tourism Organisations (RTOs) and once all the Journeys are implemented, the RTOs will take the lead in the ongoing development and maintenance of them while Tourism Tasmania will remain responsible for the ongoing marketing activities.



Image Credit: Dietmar Kahles.

HAPPENSTANCE: Touring holidays help us to detach from the monotony of modern life. Trial Harbour.



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