REIMAGINING OUR REGIONS

TASMANIA'S FAR SOUTH

Mt Beattie, Southwest National Park
Roaring 40s Kayaking

Tasmanian Government

Contents

1. Reimagining our Regions

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

At the time of the release of this report, the Tasmanian tourism industry and the Tasmanian economy and community are facing unprecedented impacts from the COVID-19 emergency. It is unknown at this point in time what the future state will be post this crisis. Insights such as from Reimagining our Regions, will be valuable in recovery and rebuild.

The far south of Tasmania was selected for Reimagining Our Regions as it was identified as having potential to develop its tourism offering, especially considering its proximity to several demand generating projects in the pipeline, including:

- Project X, the Hastings Caves Road upgrade and reopening of Tahune Airwalk,
- The new Spirit of Tasmania vessels
- Tasmanian Drive Journeys and associated marketing programs.

TThe primary objective of Reimagining our Regions is to generate ideas for tourism development opportunities – blue sky thinking about future possibilities - by a group of tourism leaders, with proven demonstrated expertise and success in tourism ventures and marketing, casting a fresh set of eyes on the region.

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

Reimagining our Regions far south was designed in two stages. In addition, if the value proposition of ideas demonstrate merit, business cases may be developed for private investment opportunities as a follow-up to Reimagining our Regions.

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

Huon Valley Council – Mayor Bec Enders;
Councillor Paul Gibson; Emilio Reale GM; Michelle Gledhill, Economic Development Coordinator
Far South Local Tourism Association – Gary Ashdown, Rachael Trueman
Destination Southern Tasmania – Alex Heroys, CEO
Parks and Wildlife Service – Ash Rushton, Regional Manager

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

KERMANDIE
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2. About the far south region

The far south tourism region ranges from Geeveston to Cockle Creek, including Hartz Mountains National Park and parts of the Southwest National Park (both included in the Tasmanian Wilderness World Heritage Area). The Reimagining the Far South project focusses on the south region, but the project also considers the surrounding areas south of Huonville and D'Entrecasteaux Channel, including Franklin.

Huonville is just 30 minutes' drive from Hobart, while the end of the road at Cockle Creek is still only 2 hours from the centre of Hobart. The majority of this area falls within the Huon Valley local government area. The Huon Valley region experiences both benefits and challenges from its close proximity to Hobart, receiving a relatively high proportion of day visitors, with visitation decreasing south and east of Huonville.

According to Tasmanian Visitor Survey data, Huonville received an annual average of approximately 165,000 interstate and international visitors in Huonville in the four years 2015 – 2018. Moving further south and east in the Huon Valley, Cygnet receives approximately 96,000 annual visitors; Dover 52,000 and Cockle Creek 28,000.

While visitation to Huonville, Cygnet, Dover and Cockle Creek grew by 10 per cent or more in the three years ending December 2015 – 2017, visitor numbers dropped 14 per cent or more in each location in the year ending December 2018. From December 2018 through March 2019, major bushfires further impacted the Huon Valley and particularly the far south region causing the closure of Tahune Airwalk, a major attraction in the Far South, as well as impacting national park and reserve sites in the region.

The far south was selected for this project because of the potential for greater dispersal of visitors and increasing overnight stays throughout the region. In the wake of the 2018-19 bushfire season, the need to identify new demand driving opportunities has become a greater priority for this region and its communities.

In 2018-19 devasting bushfires in the far south impacted tourist attractions and access to parts of the region. It would take over a year before major attractions such as the Tahune Airwalk to reopen.

Recovery funds provided some initial marketing boost. The far south region was identified for Reimagining Our Regions to support post bush fire recovery in terms of identification of destination development opportunities and to enable the consideration key pipeline projects with the potential to impact visitor numbers significantly. These pipeline projects included at the time of the Reimagining our Regions field trip:

- Increased capacity on the new Spirit of Tasmania vessels
- Sealing of the road to Hastings Caves
- Investment in Tasmanian Drive Journeys
- Tahune Airwalk Reopening
- Installation of Project X outdoor artwork
- Improved marketing by Tourism Tasmania embracing new target markets and new technologies.

These projects, termed in this report as "enablers" will be explored in more detail later in the report.

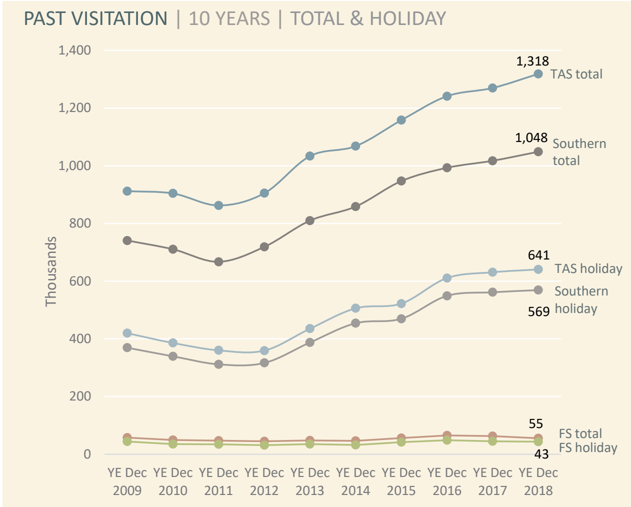
2.1. VISITOR PROFILE

For the year ending December 2018, 158,500 interstate and international visitors reported visiting Huonville, the population hub of the Huon Valley Council. The town has experienced an average annual growth in total visitors of 2.5% over the past 5 years, compared to the state average of 5.4%. These visitors stayed a total of 153,900 nights in the town.

The Tasmanian Visitor Survey (TVS) measures visitation to two towns in the Far South area: Dover and Cockle Creek. The far south area, as measured by visitors to both of these towns, received a total of 55,000 visitors for the year ending December 2018. Visitors stayed a total of 54,000 nights in the towns, with the average length of stay in the region 1.0 night. Visitors to the far south stayed an average of 21.1 nights in Tasmania, well above the average length of stay of 8.2 nights for all visitors to the state. Of these visitors to the far south, 78 per cent were in Tasmania for holiday and 15 per cent were visiting friends and relatives. Only 5 per cent of visitors took a short break of 1-3 nights, compared with 28 per cent and 30 per cent respectively for Southern Tasmania and Tasmania as a whole.

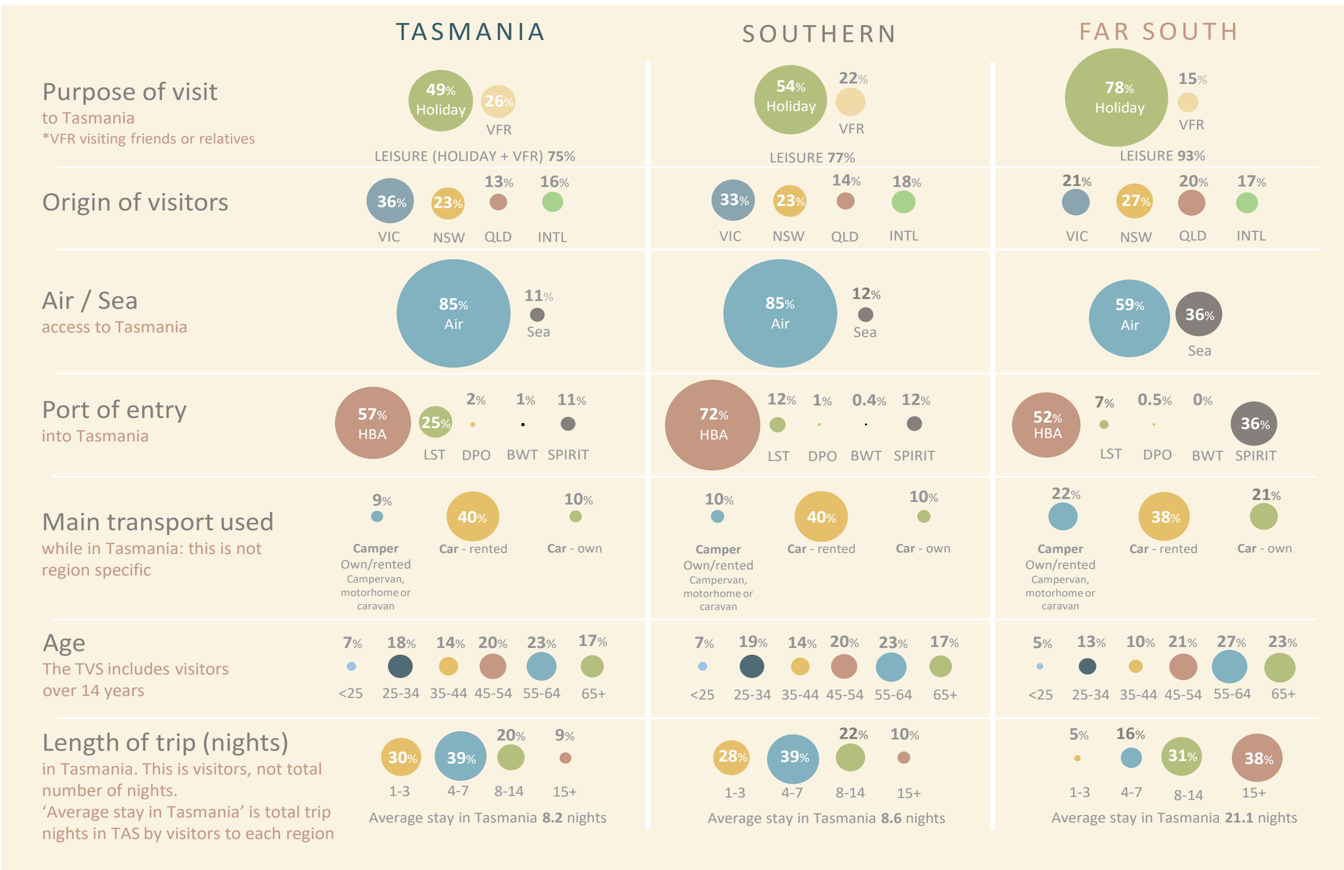
Visitors find their way to the far south either from Hobart arriving by air (52%) or arriving by sea on the Spirit of Tasmania (36%). A small number of visitors arrive via Launceston airport (7%), private charter boat arrivals and cruise ships.

Driving either rental cars (38%), camper vans (22%) or in their own car (21%), the vast majority of visitors are self-drive in single vehicles[1]. This is likely to remain the blue print for the next decade creating a flag for



infrastructure development pertaining to quality and width of roads, traffic management, parking (volume & RV parking) and shared road use between tourists and industry.

The destination appeals to a mature audience with more than 70 per cent of visitors aged 45 or older. The older 65+ market can be aligned with RV, campervans and coach tours. The lack of suitable group accommodation currently means coach groups are likely to be visiting the destination as a day trip.



[1] Tasmanian Visitor Survey Year Ending June 2019 supplied by Tourism Tasmania.

3. Market and consumer trends

In order to develop a new vision for tourism and the visitor economy in the far south and to test the validity of ideas and insights, it is first essential to understand the major market and consumer trends and challenges influencing tourism in Tasmania.

TRENDS IN TOURISM

AGRITOURISM

Evolving from a marketing tool to an industry sector, agritourism is estimated to be a US$54B global tourism sector by 2023, growing at a cumulative average growth rate of 18%, more than double the tourism growth rate forecast for the same period of 8%[2] and 4½ times the historical ten year growth of tourism in Tasmania (3.8% p.a.). Agritourism describes any tourism venture that actively seeks to bring visitors to a farm, farm gate or agricultural premises with the purposes to diversify income and visitor experiences.

The *Tasmania Draft Agritourism Strategy (2016)* sets a base context for farmers to increasingly engage with tourism and for tourism organisations and event planners to increase the number of activities theming and using agritourism as the premise for visitor experiences.

Tasmania and the far south are well placed to include agritourism as one of its experience pillars.

Woodbridge
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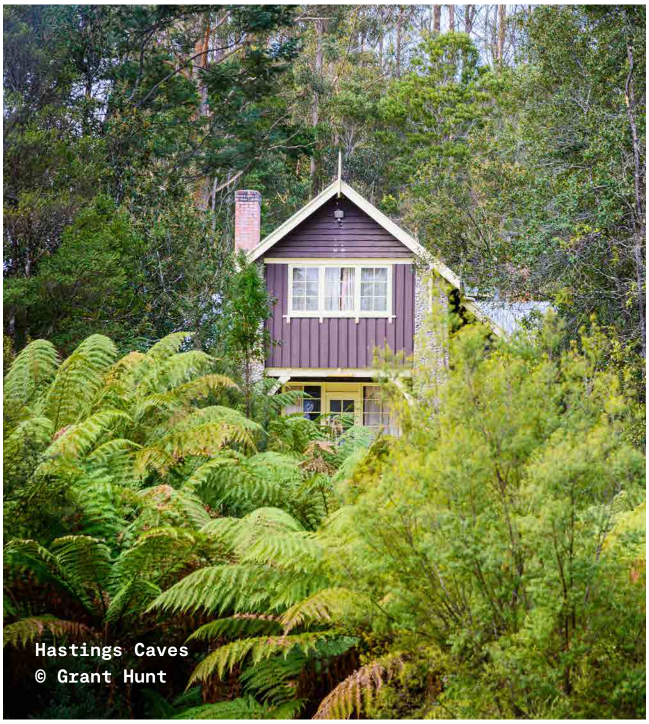


Hastings Caves
© Grant Hunt

Adventure and nature-based tourism is forecast to become a $1.3T global tourism segment by 2023, according to the US based Adventure Travel Trade Association.1 Nature based tourism sectors gathering traction with audiences include:

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

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

[2] 2019, Technavio Global Agritourism Market Research Report 2019-2023

TRENDS IN CARAVAN AND CAMPING

According to the Caravan Industry Association of Australia at year ending 30 June 2019, domestic caravan and camping has grown at 7.8 per cent per annum and the industry is valued at $7.9B in visitor expenditure.[2]

All customer segments have grown and for the first time, young/midlife couples with no children has over taken the family demographic as the largest sector of users, boding well for Tasmania and the core brand audiences. Tasmania has seen good growth in domestic caravan and camping travellers with 6 per cent growth in nights. International caravan and camping visitors represents 15 per cent of the total market segment with international visitors growing by 3.4 per cent to year ending 30 June 2019. International visitors experienced a reduction of 5.5 per cent in visitor nights, indicating more visitors are staying shorter amounts of time. More detail on the caravan and camping segment performance for year ending 30 June 2019 can be found in Appendix 2.

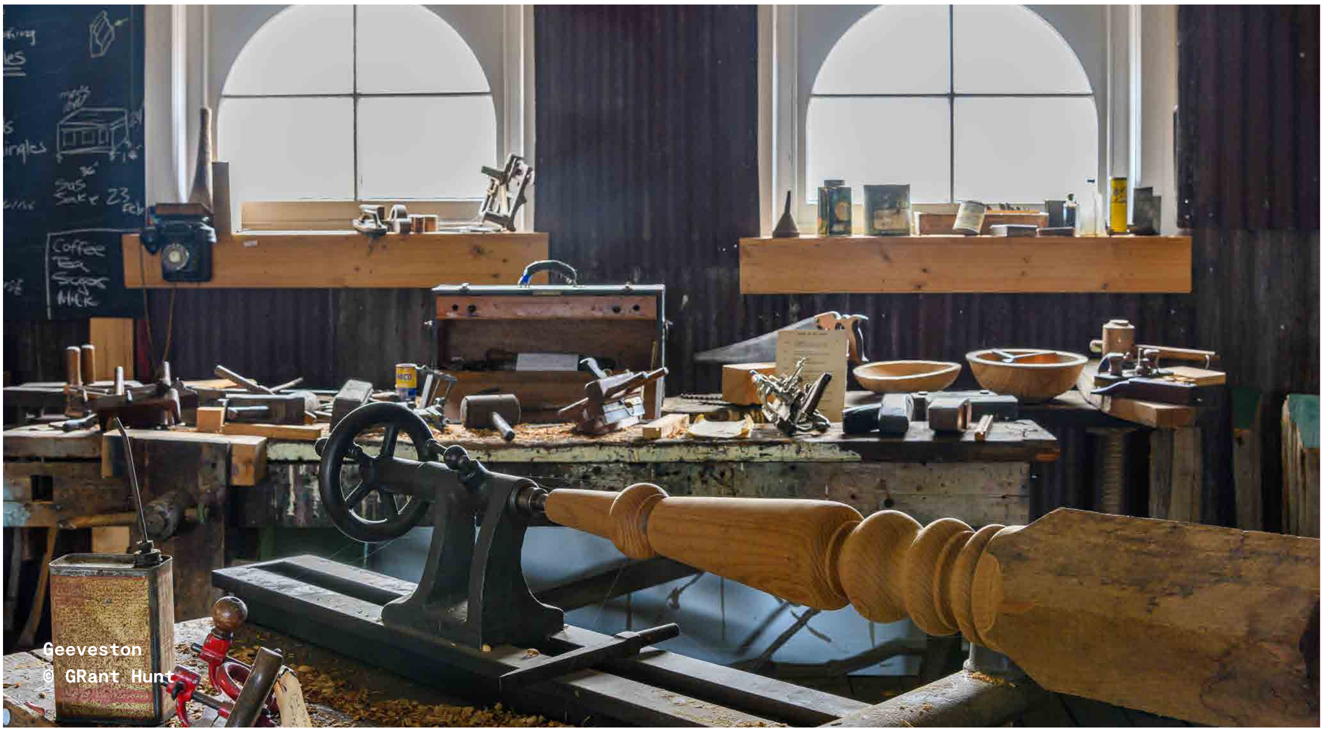
CULTURAL TOURISM

According to the international visitor survey (IVS) cultural visitors to Australia stay 25% longer and spend 20% more than other visitors[3]. A survey of 69 countries by the United Nations World Tourism Organisation is 2018 found that cultural tourism has grown 23% over the past 5 years compared to total global tourism growth of 19%. The overall growth in tourism was much larger for those countries that specifically feature cultural tourism in their marketing program[4].

The Museum of Old and New Art (Mona) has demonstrated Tasmania's capability to create a cultural icon that visitors travel for and residents embrace. Project X and the unique opportunities for Aboriginal interpretation have the potential to become cultural icons.

TRENDS IN SIGNATURE EXPERIENCE AND "HERO" PRODUCT DEVELOPMENT

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



Geeveston
© GRant Hunt

[3] International Visitor Survey, Tourism Research Australia 2019
[4] Culture and Tourism Synergies, UNWTO, 2018.

4. Destination context

T21 Visitor Economy Strategy priorities and 2030 forecast tourism demand


Cockle Creek
© Grant Hunt

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

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

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

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

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

5. Enablers to growth

There are a number of state-wide tourism initiatives that are identified as potentially impacting positively on the far south:

- The new Spirit of Tasmania vessels that will provide increased capacity for passenger and vehicles
- The Drive Journeys program to position Tasmania in the consumer market as the lead touring destination in Australia
- The upgrade of the road to Hastings Caves
- Advanced use of technology and data in tourism marketing
- Project X
- Tahune Airwalk reopening
- New customer segments for Tourism Tasmania

5.1 SPIRITS OF TASMANIA CAPACITY EXPANSION

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

The new vessels provide additional opportunities including:

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

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

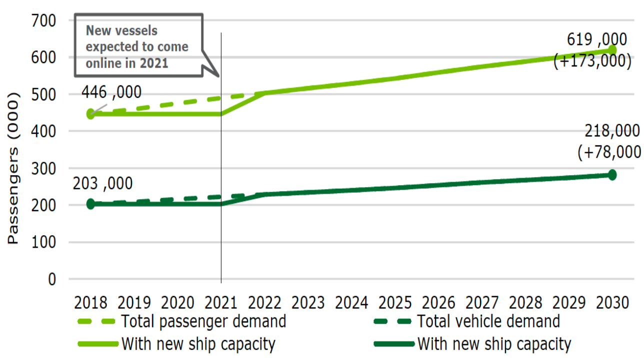
	Spirit	Air
Visitors	11%	89%
Nights	25%	75%
ALOS	18.5 nights	7.0 nights
Av. Spend	$3,230	$1,734
Holiday	70%	44%
International	7%	16%

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

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

Data source: Tourism TasmaniaTasmanian Visitor Survey YE June 2019.

CHART 5.1.2 PASSENGER AND VEHICLE DEMAND



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

NOTE: delivery dates for the new vessels has shifted

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

5.2 TOURING HOLIDAYS & DRIVE JOURNEYS

Whether arriving by air or sea, touring is a strong motivator, along with nature/wilderness and culture/history for visiting Tasmania. The far south visitors come to region as part of some of the longest holidays people take of Tasmania, with visitors to the region staying on average 21 nights in Tasmania in total, two and a half times the state average.[5]

With five official touring routes being rolled out to divide the state into consumable touring regions, the far south will be aligned with a touring route that incorporates the region and its key themes. Opportunities include marketing, signage and storytelling, plus additional more localised themed drives.

5.3 HASTINGS CAVES ROAD UPGRADE

THastings Caves Road, the main access road into Hastings Caves has been sealed, allowing for improved access and safety for visitors. Previously off limits to those in hire cars (38% of far south visitors) due to conditions of rental, sealed access will become a selling point with international and interstate visitors. The desirability of the caves experience as a natural attraction will also grow.

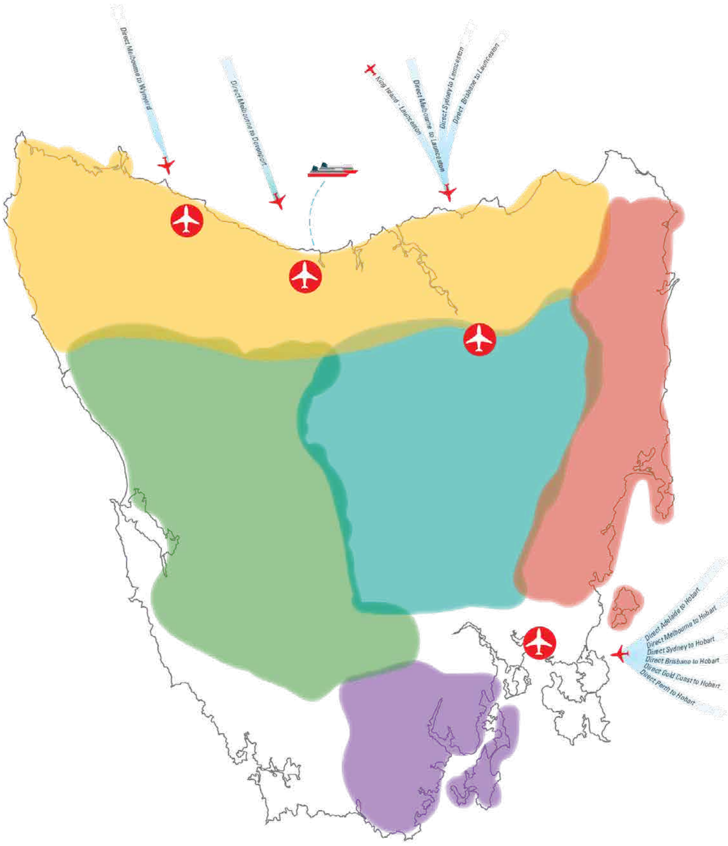
Road upgrade works were completed in late December 2019.

5.4 TECHNOLOGY AND DATA

A range of other market factors may impact the far south tourism demand and provide greater marketing and demand generating opportunities including:

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

CHART 5.2.1: FIVE DRIVE JOURNEY REGIONS FOR TASMANIA



5.5 PROJECT X

Initially launched as a bushfire recovery tactic using art developed for Dark Mofo, Project X is a series of outdoor art installations designed to create attractors that rise above destination and draw visitors into the region. The quality of the art and the calibre of the artists are intended to appeal to a cultural market who will travel for the uniqueness and prestige of seeing an artist's work in situ.

Special events and signature attractions can generate high volumes of visitors. The goal of Tourism Tasmania in launching Project X is to support a permanent installation of works acting as a foundation for a drive touring circuit or route and encouraging overnight stays.

[5] Tasmania Visitor Survey Financial Year 2018/19 prepared by Tourism Tasmania.

Visitor Centre and Cafe
© Tahune Adventures Tasmania

5.6 TAHUNE AIRWALK REOPENING

Badly damaged by bushfires in Summer 2018/19, Tahune Airwalk has been stabilised, reconstructed and is planned to reopen in early 2020.

Originally generating close to 70,000 visitors per annum, numbers had been climbing in peak season. The Tahune Airwalk is setting a plan to target 80,000 visitors per annum to the local economy.

5.7 NEW CONSUMER BRAND AND SEGMENTATION

Tourism Tasmania's new consumer brand provides an opportunity to build depth in digital content and brand storytelling. Broadening the state's target audience to include segments that make up 33 per cent of the Australian travelling public, up from the previous 14 per cent, will result in an uplift in the state's destination awareness and appeal nationally. The previous consumer segments focussed on, Life Long Learners, represented 14 per cent of the Australian travelling public and was made up of couples 40+ and couples 25-39 years old seeking touring experiences and short breaks with a focus on continuous learning and education through experiences.

This audience continues to be a focus, but now becomes a subset of the two new audience segments:

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

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

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

5.8 TIMELINE OF ENABLERS ON MARKET IMPACT FOR THE FAR SOUTH

PREPARING FOR THE ENABLERS

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

- Prepare an enabler response plan, particularly focused on the Spirit of Tasmania, Drive Journeys and the sub-impact of the increase in caravan and camping visitors to the far south of Tasmania.
- Undertake a demand impact study to quantify the increase in visitors of the key enablers as a base level of growth to the far south of Tasmania.

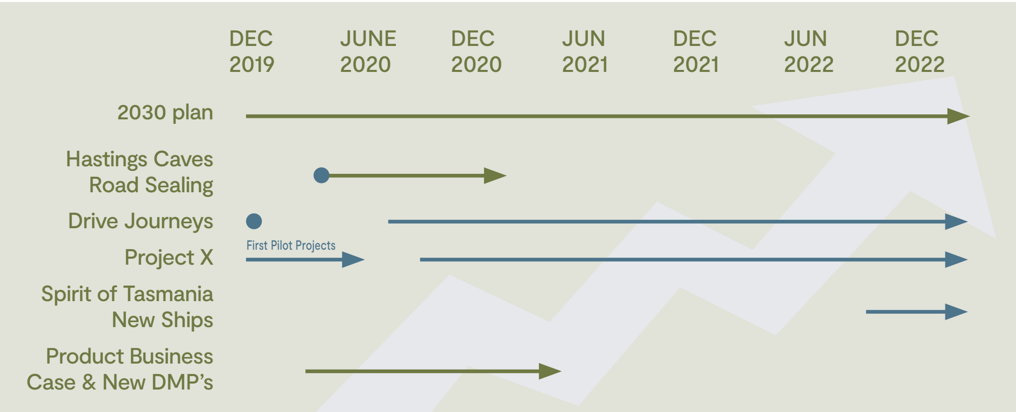
Camping by the D'Entrecasteaux Channel
© Andrew McIntosh, Ocean Photography

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

TABLE 5.5.1 DETAILED DESCRIPTIONS OF THE TOURISM TASMANIA EXPANDED MARKET SEGMENTATION

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

TIMELINES OF THE ENABLERS



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

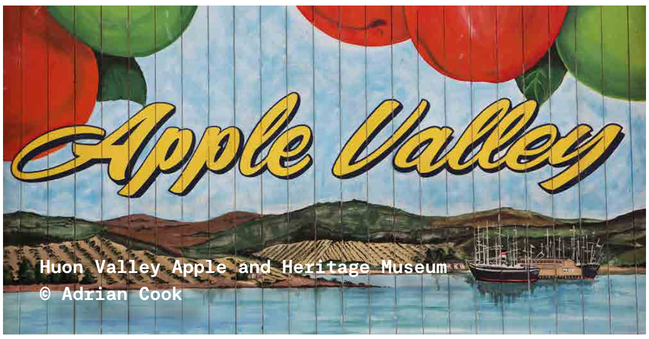
6. Emerging points of difference for the far south region

Insights from the field trip identified the region could be better served by bringing together the experiences of the far south under a series of points of difference, ideally ones that are unique to this region. The points of difference give focus for product development, marketing storytelling and encourage travellers to continue to disperse into the region, unpacking the experience further and further as they go. These points of difference also assist operators to improve their product and interpretation guided by an overarching direction that's regionally cohesive.

SOUTHERNMOST

The primary theme that imbued the region is its geography: the Southernmost point, yet accessible.

The Huon Valley Council is the southernmost municipality in Australia; Cockle Creek is the southernmost point of Australia accessible by road, and South East Cape, south of Cockle Creek on foot, is the southernmost point of (mainland) Tasmania, the southernmost state in Australia. As a singular region, the Huon Valley and far south could extract greater leverage from this superlative – the attraction of visiting the 'southernmost…'. The opportunity is to juxtapose this against the northernmost point of Australia in far north Queensland. Increasing awareness of this region's southernmost yet accessible location could enhance its position as a distinct destination from Hobart and could assist in shifting travel patterns towards increasing numbers choosing to fly and drive straight into the region for overnight stays.



Huon Valley Apple and Heritage Museum
© Adrian Cook

FOR THE LOVE OF CRAFT

The Huon Valley is well known for its fresh produce and cottage industries. The region has a long history of apple-growing and increasing contemporary cider production. Growing awareness of the region has also come from farmed salmon, exported across Australia and internationally. There is a high density of roadside stalls with honesty boxes, where visitors and locals can pick up fruit, vegetables, juices and preserves straight from the farm gate.

This southernmost region is home to a growing population of artists and artisans, especially around towns like Cygnet with its Folk Festival, studios and galleries. More than the products of the region themselves, however; the craft involved in their production stood out more, for the field trip participants. Similarly, the act of making or doing appeared more important than the final product or sale among most of the craftspeople and artisans encountered during the field trip. Those with a craft frequently articulated an ethos of restricted production or operating hours in order to enhance and maintain their own control and enjoyment of their craft and associated lifestyle within the southern communities and natural environment.

This sense of craft encompasses all products, whether they are made for aesthetic enjoyment, function, or consumption. It also cuts across the skills involved in making both products and experiences; it applies equally to both the craft of the wooden boat maker and the craft of the sailor.

Access to the region's crafts and craftspeople is based largely around the site of production rather than separate shops or galleries. Authentic and individualised visitor experiences develop from pervasive opportunities to meet the maker and see or hear about their craft in situ. Many of those with a craft also offer opportunities to share in their love of their craft and the act of making, including hands-on pickling or pottery workshops, or the chance to practice skills such as

Cygnet Folk Festival
© Steven Pearce

those involved in fossicking, paddling or sailing. These experiences and increased appreciation of the craft also enhance visitors' enjoyment of local products, encouraging further expenditure.

THE EDGE

At the southernmost extreme of the great southern land, there is a certain humility and respect for traditional crafts and skills, juxtaposed with a rebellious and innovative streak born of this peripheral position. This 'edginess' refers to both a sense of being at the edge of wild and at the edges of western 'civilisation'.

On the edge, it is possible to be simultaneously close and far – southernmost yet accessible; experience the familiar yet original – through crafts, produce and heritage; be sheltered while exposed – through varied natural landscapes and soft adventure experiences.

Both natural inspiration and an attendant resourcefulness from living on the edge encourage a certain originality and experimentation evident in the people, products and stories of this region.

This southernmost region allows for an easy escape and disconnection from busyness and routine with its proximity and quietude, between a regional city and the vast south-west wilderness; it allows for relaxed discovery and connection with approachable locals and accessible wilderness.

Exposed points and sheltered bays along rivers and coasts; views of mountains and gentle rolling hills; underground caves and pools in World Heritage-listed wilderness, and dark skies all offer opportunities to get out into nature, on-land and through waterways, without necessarily straying too far from home comforts or one's own comfort zone.

BALANCE (SUSTAINABILITY)

In the southernmost region, the environment is green and lush; water is clean, fresh and plentiful. There is an understated sense of sustainability or 'balance' in local lifestyles and production – an antidote to busyness and excess, a model for how to live.

Craft products are small batch, limited. Wooden boats are made slowly, to last, to travel on an even keel. Regional flavours are seasonal, local, unassuming but sophisticated in their simplicity; refined but not overly processed. Ingredients are sourced direct from the grower or artisan - from backyards, market gardens, smallholdings, local shops and through community connections.

Opening hours and availability reflect and respect the needs of the product and the producer for quality over quantity – the time it takes to grow, source, make and sell; the time it takes to live: work, rest and play.

Although not necessarily 'self-sufficient', there is a nostalgic ethos of sufficiency and a quiet confidence in knowing and saying when 'that's enough'. In turn, this reinforces a more mindful approach to resources (low waste, organic, shared); living in balance with nature and the seasons. It enhances an awareness of time and the benefits of taking time over instant gratification.

An openness to spending time and living in balance also benefits an appreciation and understanding of the region's rich Aboriginal heritage and continuing culture.

7. Regional product development: a framework

Depth of product, rather than one big attraction, serves a wider variety of audiences and holds greater promise for sustainable growth in visitor demand. Destination development can be understood against a 'Product Hierarchy' model[6] which provides a framework to consider the elements for the foundation of sustainable tourism growth.

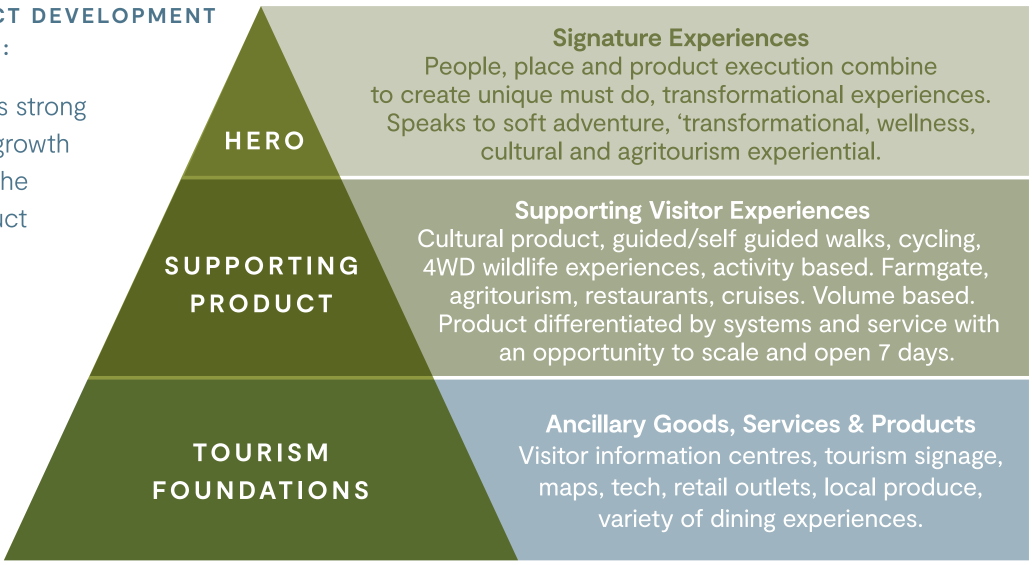
The big hero experience is often what destinations will seek to develop and while signature experiences are important as a drawcard for a destination, they must be supported by other visitor experiences and foundation services to meet basic needs and expectations of visitors and extend stay.

It is vital that a region wide approach to improvement of the ancillary goods, services and products that serve as the foundation for tourism in region, be undertaken to ensure growth that is coming occurs on a solid foundation. These basics include visitor information services, signage, maps, guidance technology, WIFI and mobile phone coverage and access to quality toilets, food, beverage and coffee outlets at reasonable distances. Whether it's a caravan and camping customer or international high value travellers, having these services market ready is vital. Growing the destination across all tiers of product promises to deliver a range of economic and social benefits to the communities in the far north west and strengthen the visitor economy, including:

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

7.1.1: REGIONAL PRODUCT DEVELOPMENT – PRODUCT HIERARCHY':

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



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

8. Priority concepts

The field trip generated a range of experience and product development ideas which have been loosely grouped in the following priority concepts.

1. COCKLE CREEK VISITOR EXPERIENCE:

Taking ownership of the Southernmost location, Cockle Creek shares life on the edge, the interface of two cultures and where the wild Southern Ocean meets world heritage forests. The Cockle Creek visitor experience has the opportunity to be iconic; a destination for those Australians who aspire to visit the Southernmost tip of the country.

2. HASTINGS CAVES AND THERMAL SPRINGS:

Renowned for its globally significant caving system, the precinct takes visitors on a journey of discovery. With a future focus on experience development and the addition of overnight stays, after dark forest experiences, small group adventure caving and revitalised hot springs and visitor centre, this is a hero in waiting.

3. FRANKLIN FORESHORE:

A gateway to the Far South, the Franklin Foreshore could become a globally significant lost trades hub showcasing boat building with accommodation, jetty, marine tourism, an expanded wooden boat centre, rare and lost trades training and local food and wine experiences.

4. REGIONAL COLLABORATION ON PRODUCT OF THE HUON:

At most cafes, bars and restaurants visitors try local produce, local drinks and a distinctly Tasmanian style of hospitality. There is an opportunity for produce collaboration under the Huon Valley brand which could extend further into retail and point of sale. Making the products more accessible to customers particularly on days when cellar doors and farm gates are closed would be advantageous.

The far south and Huon Valley have some emerging soft adventure experiences, land and water-based. The geography of the region makes it possible for visitors to sample many activities, delve deeper into some adventure (for example walks in the TWWHA) or to try a soft adventure experience.

5. NATURE-BASED SOFT ADVENTURE:

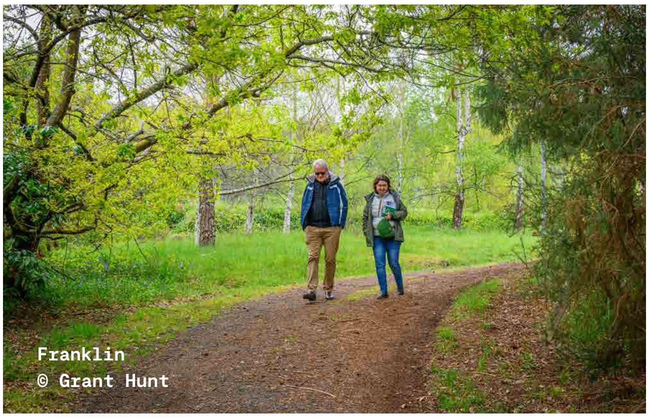
Region wide, the far south and Huon Valley are already a burgeoning soft adventure playground. Offering depth and breadth, the region makes it possible for visitors to sample many activities, delve deeper into one or a combination of them all.

FOCUS ON STORYTELLING:

Visitors are connecting and making their decisions to travel based on stories and their connectedness to the way people and place are portrayed. Aboriginal, colonial, natural, maritime, conservation or modern; well told stories of the people and place or the southernmost place, combined with contemporary marketing strategies provide many opportunities to connect with future visitors.

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

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



Franklin
© Grant Hunt

8.1 COCKLE CREEK VISITOR EXPERIENCE AND AMPLIFY THE SOUTHERNMOST STATUS

POINT OF DIFFERENCE	southernmost
LOCATION	Cockle Creek
HUB	Cockle Creek; Dover; Southport
VISION	Taking ownership of the southernmost location, Cockle Creek shares life on the edge, the interface of two cultures and where the wild southern ocean meets world heritage wilderness.

Cockle Creek is a site of state, national and international significance. Its location at the southern end of the Tasmanian Wilderness World Heritage Area (TWWHA) and gateway to the southernmost point of Australia means it is already becoming a focal point for visitors. Segments of the caravan and camping market are renowned for being bucket list tourists, and the growth in capacity of the new Spirits of Tasmania vessels will increase the number of visitors completing the north, south, east and west quadrella.

Improving the visitor experience at Cockle Creek creates purposeful dispersal into the region.

Cockle Creek
© Grant Hunt

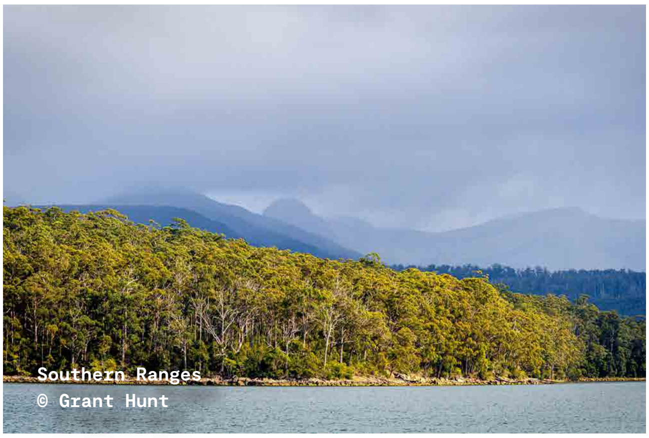
CASE STUDY EXAMPLE – STONEHENGE VISITOR CENTRE

In 2013, World heritage listed Stonehenge reimagined the visitor experience of the iconic cultural and tourist attraction. Relocation of the visitor centre 1.3miles before the monument, sunken into the hills creating a low key building that is sensitive to the environment. More than that, a curated customer experience now builds anticipation, creates a sense of story and interpretation of the site and makes for a ore connected and peaceful visitor experience.

Replacing driving to the site with shuttle buses reduces the traffic and site degradation making for a more sustainable attraction overall.

Ancillary experiences such as accommodation and camping, retail and food and beverage have been masterplanned to provide a balance of commercial and public facilities.

© Peter Cook, Denton Corker Marshall


Southern Ranges
© Grant Hunt


South Cape Bay
© Geoffrey Lea

Improving facilities for soft adventure visitors and caravan and camping visitors will increase yield and overnight stays. Making camping pre-bookable online aligns with the behaviours of audiences in other locations and on mainland Australia.

Parts of the Cockle Creek experience are located within the TWWHA, adding a layer of complexity to planning and development. Cockle Creek is managed by the Parks and Wildlife Service and some upgrades are already planned.

The insights identified the following opportunities:

- Cockle Creek is a destination at the end of the road: have a greater sense of arrival – marker or photo opportunity at South Cape Bay
- Augmented reality experience at South Cape Bay to 'stand at' the true southernmost point (South East Cape)
- Increased cover / facilities for walkers on the South Cape Bay part of the South Coast Track
- Overnight hut-walk to South Cape Bay (hut on route or at Cockle Creek)
- Cockle Creek improvements / visitor node – commercial camping, RV sites, cabins and providing campers with safer access to the beach
- Seal the road to Cockle Creek
- Opportunities for the Aboriginal community to share their cultural stories
- The proposal for the palawa lugganah track provides a range of walking and cycling opportunities linking the towns of Huonville, Geeveston, Dover and Southport will appeal to a soft adventure customer that has the time to explore.

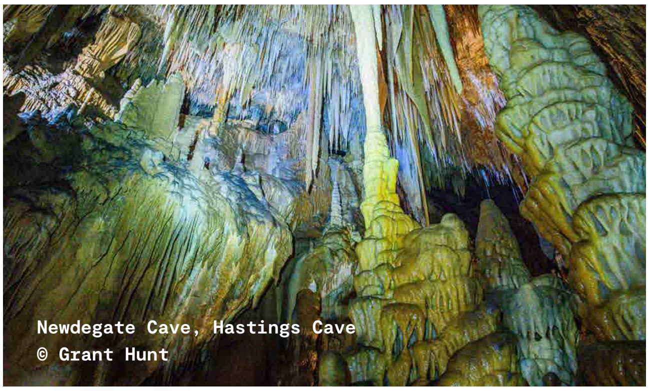
8.2 HASTINGS CAVES: ROAD UPGRADE AND REIMAGINED VISITOR EXPERIENCE

LOCATION Hastings Caves

HUB Dover; Southport

VISION Renowned for its globally significant caving system, the precinct takes visitors on a journey of discovery. With overnight stays, after dark forest experiences, small group adventure caving and revitalised hot springs and visitor precinct, this is a hero experience of the future.

This globally significant caving system has existing, albeit dated infrastructure, that provides for a strong nature-based experience for nearly 40,000 visitors a year. The sealing of the road to Hastings Caves makes the cave drive accessible to those visitors in rental and hire cars. Rental conditions normally restrict visitors from taking their car on dirt roads. This destination is poised to attract interstate and international visitors in greater numbers through sheer word of mouth alone.


Newdegate Cave, Hastings Cave
© Grant Hunt

In the past, nearly half of the visitors to Hastings Caves have included the Tahune Airwalk in the same visit. The closure of the Airwalk due to fire damage in early 2019 has reduced visitors to Hastings Caves in 2019, but also provided a window for the road to be sealed. The reopening of the Airwalk in early 2020 will again provide two attractions that work collectively to extend stay an improve visitor spend in the region.

The future visitor experience of Hastings Caves could be one of world class adventure and geology experiences. The connectivity to the thermal spring water story can be amplified and the sense of place of the pool (s) be naturalised into the stunning backdrop of the TWWHA. According to the Global Wellness Institute, the global wellness economy was estimated to be valued at US$4.2T and wellness tourism estimated at US$5.4B[7]

Upgrades to the thermal pools through more natural landscaping, boosting the natural temperature of the spring water and providing some interpretation of the mineral properties of the waters would improve visitor experience and engagement.

Catering for visitors all year round and extending trading hours in the summer time to spread the crowds makes sense. As a destination at the end of a road, there is a visitor expectation and a captive opportunity to enhance the retail food and beverage experience.

Insights for opportunities include:

- Review the business model and operations of the visitor centre, food and beverage and tours to identify an approach that is more commercially focussed and has a customer-centre approach to experience and service.
- Masterplan the precinct with reference to the two distinct precincts of thermal pools/ wellness and adventure type visitors;
- Develop a new tourism masterplan for Hastings Caves, recognise caves as key asset while managing growth with expanded eco-tourism product around the site;

CASE STUDY EXAMPLE – PENINSULA HOT SPRINGS, MORNINGTON PENINSULA

Founded in the late 1990's by businessman Charles Davidson, Peninsula Hot Springs has grown from modest beginnings to welcoming more than 440,000 people per annum and growing. Constantly evolving the business is based on the Japanese onsen bathing culture with uniquely Australian thermal pools dotted across acres of Australian bush vegetated land. Capable of having up to 300 people on site at one time, the property draws water from aquifers underground, treats and heat them to a variety of temperatures.

This is one 23 properties in Australia with the industry still considered boutique.


© Peninsula Hot Springs

[7] 2019 Global Wellness Institute, Global Wellness Economy industry update

- Provide multilingual interpretation;
- Redesign visitor centre layout / ticketing experience (separate from food and beverage counter);
- Improve journey between the visitor centre/ thermal pool and the cave site;
- Increase arts/cultural events in caves and around cave site;
- Expand thermal pools and surrounds – restyle/re-sculpt main pool to increase capacity while enhancing integration with surrounding environment;
  - Increase temperature of pool/s;
  - Add value through spa and massage facilities/services;
  - Increase food and beverage options;
- Convert chalet for commercial accommodation or day spa experience usually aligned with thermal spring locations;
- Develop adventure tours departing from visitor centre into less visited or off limit locations e.g. caving tours into Mystery Creek Cave
- Promote Hastings Caves to major touring companies for inclusion on Tasmanian itineraries (e.g. Inspiring Journeys; Outback Spirit), particularly those of smaller group sizes and small vehicles.
- Parking will become an issue. Shuttle buses may be required in peak times to cater for crowds.

8.3 FRANKLIN FORESHORE – MASTERPLANNED AS A HUB FOR LOST TRADES, LOCAL FOOD AND WINE

HUB	Franklin
VISION	Gateway to the south, the Franklin foreshore can become a globally significant lost trade's hub for boat building with accommodation, jetty, marine tourism, wooden boat centre, rare and lost trades training and local food and wine showcase.

Visitors are drawn to the rare, the lost and the unique. Franklin has the potential to be all of these. Growing demand for experiences that preserve lost crafts, arts, trades and skills are seeing centres of excellence aligned with unique visitor experiences thrive the world over.

With an existing development application planned for the 'evaporator sheds' component of the precinct, including boutique accommodation, dining and premium produce retail hub, the design and experience needs to be aligned with the broader jetty, wooden boat and café experiences.

The wooden boat centre's humble façade belies the incredible talents and excellence within. Booked out months in advance for craft courses, boat making and months long sabbatical programs, this unique centre is Australia's best, and one of the best in the world.


Wooden Boat Centre
© Grant Hunt


Boat slip yards
© Grant Hunt

With only a handful of centres like it in the world, its proximity to Hobart and integration with a destination people travel to see make it a true hero product opportunity.

Other centres globally have evolved to offer courses and training, along with festivals, speakers, exhibitions and of course, opportunities to get out of the water and enjoy the craft in situ.

Tasmanian produce
© Dan Uglow

There is an opportunity for Franklin to be a focal point for day visitors, an accommodation precinct for intrastate conferencing and break outs from Hobart, signature accommodation for the region of international market quality and encourages a focal point and hub for local collaborations in produce and craft.

With a vision for being a showcase of Tasmania's unique maritime tourism experiences, the opportunities that came out of the insights were:

- Masterplan for Franklin precinct – including riverside walkway, accommodation developments, wooden boat centre, and watercraft mooring as possible ideas, master planning and business case development should be completed before development of either the accommodation or wooden boat precinct progresses;

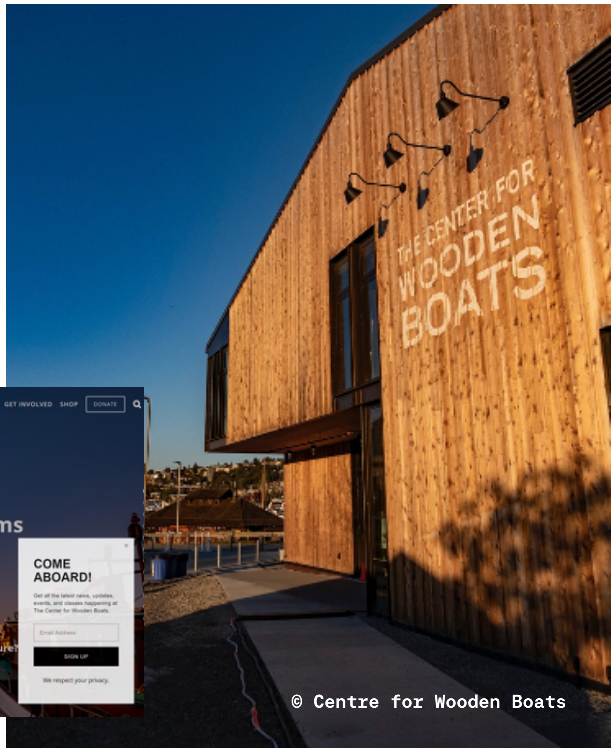
CASE STUDY EXAMPLE – SEATTLE CENTRE FOR WOODEN BOATS

As much a piece of craft in its own right, the Seattle Centre for Wooden Boats is one a handful of centres for excellence dedicated to preserving the diminishing craft of wooden boat building.

Nestled on the edge of Lake Union in Seattle, Washington, the Centre was the passion project brainchild of Dick and Colleen Wagner, enthusiasts who founded the centre with their own small collection. Since 1957, the not for profit has gone on to become of the cities iconic museum, the epicentre of maritime history and passionate custodian of wooden boat craftsmanship.

Attracting hundreds of thousands of tourists and recreational sailors from all over the world, the centre connects like-minded people with a local community for an authentic and genuine Seattle experience.

www.cwb.org homepage



© Centre for Wooden Boats

- Franklin and Huonville town and riverside 'beautification';
- More wooden boats and kayaking guided and self-guided experiences;
- Amplify the existing tourism experiences such as kayaking for hire, sailing charters and river ferries;
- Engage with the salmon industry and create new experiences around salmon farming that connect with the maritime stories.

CASE STUDY EXAMPLE – BAROSSA FOOD PRODUCERS

Barossa Food is a producer collective that while only a decade old has been nearly 160 years in the making. Evolving out of one of Australia's oldest food and wine regions. A membership organisation, the collective's purpose is to weave tradition with innovation, highlighting the talent of the contemporary makers and artisans who choose to call the Barossa home. It is also to give life to the equally delicious story of Barossa's food culture to support the global reputation for wine. Visitors to the region can easily identify members, and it's possible to purchase a picnic basket from the visitor information centre in Tanunda which includes vouchers to collect samples from participating members on your travel, to build your tasting collection for when you choose to stop and prop.

Maps and a mobile application help guide visitors through the region.

Woodbridge
© Grant Hunt

8.4 GREATER REGIONAL COLLABORATION

HUB Region Wide

VISION Become a model of collaboration over competition.

Region wide collaborations have begun to flourish organically. The boutique craft production requires time, yet the public interface and requirements of customer service can diminish the time required to perfect the craft and product.

Creating cross region opportunities for people to purchase products, interact with each other's outputs and focus the visitor on given days of the week to particular locations makes for a more engaging visitor experience and channels them to key hubs.

Looking to examples of other successful regions such as the Barossa Valley in South Australia and Daylesford in Victoria where the region's key points of differences became the starting point for a truly integrated visitor experience.

Apples for sale
© Andrew McIntosh, Ocean Photography

Geeveston Feast
© Matt Osborne

The following, general product and destination development concepts came from the insights:

- Develop new model for local tourism that privileges cooperation over competition e.g. coordinate food and beverage operators to ensure a reliable offering for visitors without compromising quality of life for individual operators; focus new accommodation developments around visitor/service hubs to concentrate critical mass and encourage further investment;
- Educate local businesses on the visitor economy; identify opportunities to upskill;
- Develop a destination and visitor experience brand toolkit for product development – how to build and assemble products relevant to the customer;
- Encourage set-up of brand and experience hubs: one stop shops for regional produce, booking and distribution services to alleviate business pressures for small owner-operators;
- Engage in more explicit sustainability initiatives – operators demonstrate leadership on nature protection initiatives; electric car destination etc.

Taste of the Huon
© Chris Phelps

Additional food and drink-based insights unearthed these additional opportunities:

- Complete renovation and restyling of Geeveston Town Hall to better support craft studios, local product sales, varied events, on-site visitor experiences and complement the craft ethos of the town and region;
- Local shops sell locally made baskets / bags to fill with local products, along with 'hidden gems' cheat sheet;

- More cafes and restaurants opening for dinner in Geeveston, Dover, and Franklin;
- Waterfront, seafood restaurant in Dover and other destination restaurants;
- More farm gate experiences.

8.5 EXPERIENCE BUNDLING

HUB Region wide; Wi-Fi enabled

VISION Be it technology or old-fashioned maps, the region guides visitors to the best experience for them through product and experience bundles where the suggestions are only what's able to be experienced on that day.

Aligned by customer or by special interest, time available or iconic experiences, themed drives that connect the visitor's interests with the key points of difference are driving growth in tourism.

Putting the customer at the centre of the experience, creating digestible ways for visitors to consume a region or guide themselves to key points of interest ensures a greater customer satisfaction and potential for greater word of mouth and online sharing.

Additionally, it creates a natural and obvious foundation to the marketing plan and base for a content production strategy.

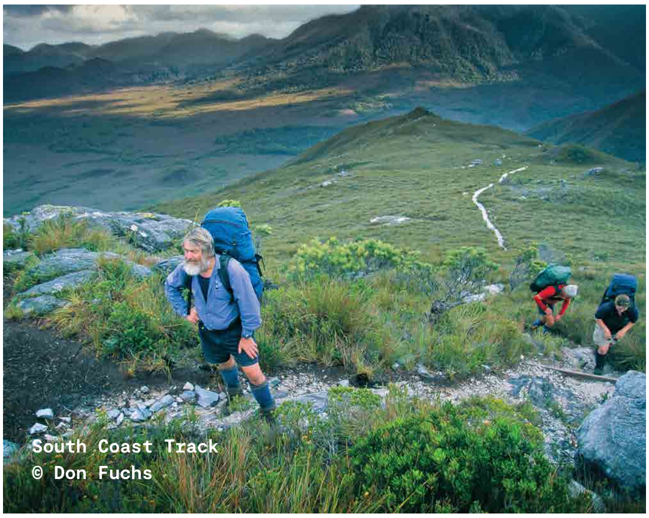
Experience bundles could be created by:

- Points of difference themes, aligned to the types of experiences for the key customer segments;
- Mid-week or weekend visitor experiences;
- Acknowledging the differences in families versus solo or couple travellers;
- Adventure activity pillars such as maritime, walking, biking; hard and soft adventure
- Sub-destination tasting trails and grouped experiences (eg: wine and cheese)

The Southern Drive Journey will be launched in May 2020 – opportunity to identify experiences and stories that can be used for visitors to build their own itineraries using planning tools that will enable them to create their own customised itinerary. However, the region should consider developing its own stories and suggested collaborative groupings that suit the customer segments of appeal. Examples, but not limited to include:

- Seafood themed trails
- Nature based activity itineraries
- Cider, gin or wine trails, even grouped by grape
- Maritime experiences and stories
- Indigenous point of engagement

Ida Bay Railway
© Grant Hunt



South Coast Track
© Don Fuchs

8.6 NATURE-BASED SOFT ADVENTURE

HUB Huonville

VISION Region wide, the far south and the Huon Valley have developing soft adventure experiences. Offering depth and breadth the region makes it possible for visitors to sample many activities and delve deeper into one, many or all of the experience.

The growing market for adventure traveller to deliver transformative experiences bodes well for the Huon Valley and the far south. With a sense of being on the edge; the cusp, the compactness of the region and the diversity of natural canvas to consider adventure from provides a truly unique opportunity.

The destination can leverage off, but not replicate the experiences elsewhere in Tasmania. The success of mountain biking in the State's north is one example. Adventure travel product falls into three categories: land, air and water.

The opportunity for region wide adventure experiences also speaks to the notion of balance. This southernmost environment is green and lush, with plentiful clean water. There is a sense of balance and order to lifestyle and production with adventure experiences appealing to people who are seeking to connect and understand nature. In the far south, people have a sense of knowing when enough is enough, living in balance with nature and the seasons.


Fossicking
© Rob Burnett


Twin Rivers Adventure
© Tahune Adventures Tasmania

A region wide adventure strategy that focuses on destination custodianship and stewardship, sustainability and experience development would be highly beneficial.

Opportunities that were derived from the insights included:

- Summer glamping options in/around National Parks (e.g. Hastings, Cockle Creek), playing on the sense of balance – limited time only, it's something for summer, not all year round;
- Geodomes, pods and other demountable, instagrammable accommodation;
- Southport Lagoon day/overnight walks utilising existing 4WD tracks and boat launches;
- Reinvigoration of the Huonville quarry into an adventure hub;
- Upgrades to Adamsons Peak and Adamsons Falls tracks;
- Fossicking tours and commercial hire services (for the real hidden gems);
- Dark sky experiences;
- Improved day visitor facilities and interpretation at Southport.

9. Quick wins and low hanging fruit

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


Apple Picking
© Chris Phelps

CASE STUDY EXAMPLE – QUEENSTOWN, NEW ZEALAND

Queenstown, New Zealand, is arguably the world's adventure capital. Collaboratively the adventure sector has worked with Tourism New Zealand over nearly four decades to refine and evolve the adventure offering. Originally a snow and hiking destination, Queenstown is now the hub of adrenaline sports such as jet boating, sky diving and bungee but is also a thriving ski resort in winter and the trail head for the famous Milford Track. Destination awareness and product development have worked in alignment to evolve the customer experience.

ACTION	TIMING 0-6 MTHS	TIMING 6-12 MTHS	TIMING 12-18 MTHS	NOTES
Develop customer journey maps				Consider the content and key points of difference emerging against key market segments (RV, camping, Erudites, Raw Urbanites, with and without children
South Cape Bay Walk				More specific marketing of the existing South Cape Bay walk as the southernmost day walk, encouraging overnight stays in the region before and after the walk. Testing/trial of pop up glamping accommodation
More granular content strategy				Growing on the Huon Beings, shining a light on individual places, products, personalities that exemplify the key regional points of difference
Opening hours plan				Collaboration to ensure an "always on" approach to food and beverage in key centres, taking turns or rotating venues to ensure 7 days a week.
Development of stories for experience bundling opportunities				Help the visitors to know how to consume your region by creating the stories to build personal itineraries through trip planning tools.
Regional activations and sub events				Create reasons to come and invite the visitors to share in the community's festivals (street parties in Geeveston, community dinners)
Enhance brand and stories in localised alerts within the Huon Valley visitor app				Offer products commercial opportunities to send alerts to visitors based on geotargeting and regional proximity

APPENDIX 1:
Participants & field trip itinerary

PARTICIPANTS

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

GRANT HUNT (TRIP LEADER)

CEO, Voyages Indigenous Australian Tourism, Director Discovery Holiday Parks, former Chair and board member of Tourism Tasmania, Tourism Northern Territory, Uluru Kata Tjuta National Park, former owner of Anthology Collection, operators of the Cradle Mountain Huts Walk and Bay of Fires Walk, respected nature based tourism and eco tourism development consultant.

MICHELLE COX

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

JOHN FITZGERALD

Chief Executive Officer,
Tourism Tasmania

ANNE GREENTREE

Director Visitor Economy Strategy,
Tourism Tasmania

DANA RONAN

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

BRETT TOROSSI

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

ALEX HEROYS

Chief Executive Officer,
Destination Southern Tasmania

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

TOURISM TASMANIA

Renee Harrington,
Experience and Famils Officer & Driver-Guide

Allison Anderson,
Manager Research and Insights (Briefing)

TASMANIA PARKS AND WILDLIFE SERVICE

Jason Jacobi,
Deputy Secretary (Briefing)

Jeremy Hood,
Parks and Reserves Manager – South West (Day 2)

HUON VALLEY COUNCIL

Mayor Bec Enders

Councillor Paul Gibson

Emilio Reale, General Manager

Michelle Gledhill,
Economic Development Coordinator (Briefing)

CONTRACTOR

Megan Tighe,
Field Trip Summary Report (except Day 3)

ITINERARY

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

The Field Trip participants were immersed in the far south for three days. The Field Trip drove directly from Hobart to Kermandie, travelling through Huonville. The first night an industry briefing that included the Huon Valley Council, Tourism Tasmania, Parks and Wildlife Tasmania and the Field Trip participants explored the key factors affecting the growth opportunities for the region and heard about key projects already approved by the council.

Beyond Kermandie, the itinerary included stops in towns and at viewpoints, briefings from key industry partners include Tahune Adventures, Parks and Wildlife Services field officers, food and beverage operators, small producers and short famils at a range of existing tourism attractions and experiences. Participants experienced the region on foot, by bus, and on water; above ground and under it. The Field Trip also included a meet and greet 'mini-expo' with local tourism and agribusiness operators, held in Dover.

The Field Trip concluded in Hobart, returning via Franklin, Cygnet and Birchs Bay. Participants visited the Wooden Boat Centre, Frank's Cider, Yukon ketch, Old Cygnet Cannery, South East Tasmania Aboriginal Corporation and Grandvewe cheesery and distillery which provided many different points of view around growth of tourism in the region.

Tourism Tasmania and the field trip participants would like to thank the following tourism operators and associations for their hospitality in the region and acknowledge their valuable contributions to this project:

Bears Went Over the Mountain

Campo de Flori

Dover RSL Club

Driftwood Cottages

Esperance Adventures

Evoke Spirits

Far South Tasmania

Frank's Cider Bar and Café

Franklin Evaporators Pty Ltd

Geeveston Town Hall Co Ltd

Grandvewe Farm & Cheesery

Harvest & Light

Huon Valley Council

Ida Bay Railway

Kermandie Hotel

Lunaris Gemstones

Michelle's Roadhouse

Peninsula Cruising

Port Cygnet Cannery

Rocket at the End of the Road

South East Tasmanian Aboriginal Corporation

Surges Bay Orchard

Sustainable Timbers Tasmania

Tahune Adventures

Tasmania Parks and Wildlife Service

The Coffee Tree

Willie Smiths

Wooden Boat Centre Tasmania

Yukon Tours

APPENDIX 2:
Caravan and Camping Audit for the Far South

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

12 December 2019

Dear Stuart

COMPILATION REPORT

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

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

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

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

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

Yours sincerely

BDO Advisory (SA) Pty Ltd

Rudy Pieck

Director

2019 REPORT SUMMARY

641,644 CARAVANS

REGISTERED AT 31 JANUARY 2019

4.7% GROWTH

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

6210 POSTCODE

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

500KG – 1 TONNE

THE MOST COMMON WEIGHT RANGE FOR REGISTERED CARAVANS

69,693 CAMPERVANS

REGISTERED AT 31 JANUARY 2019

17 YEARS

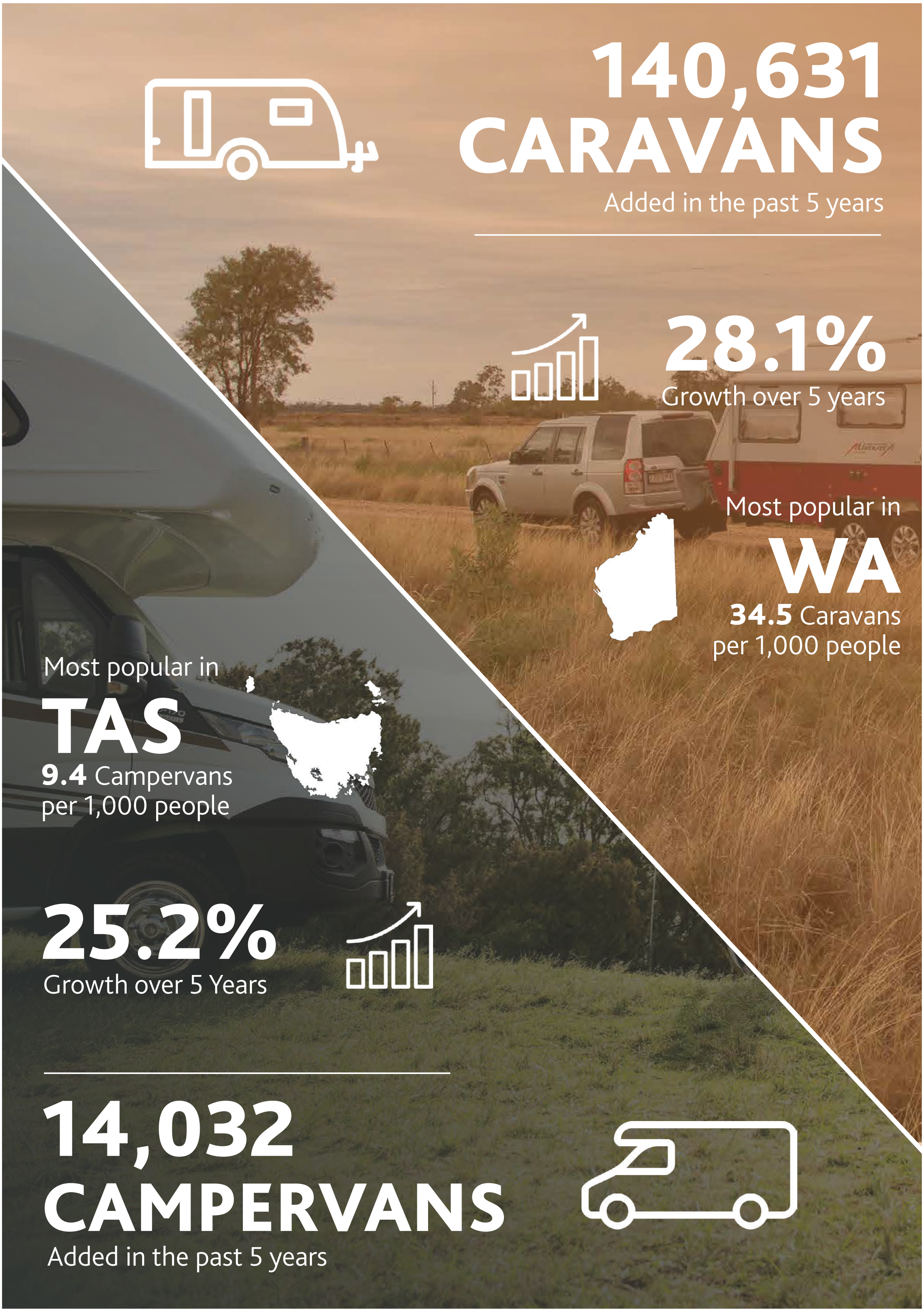
THE AVERAGE AGE OF CAMPERVANS IN AUSTRALIA

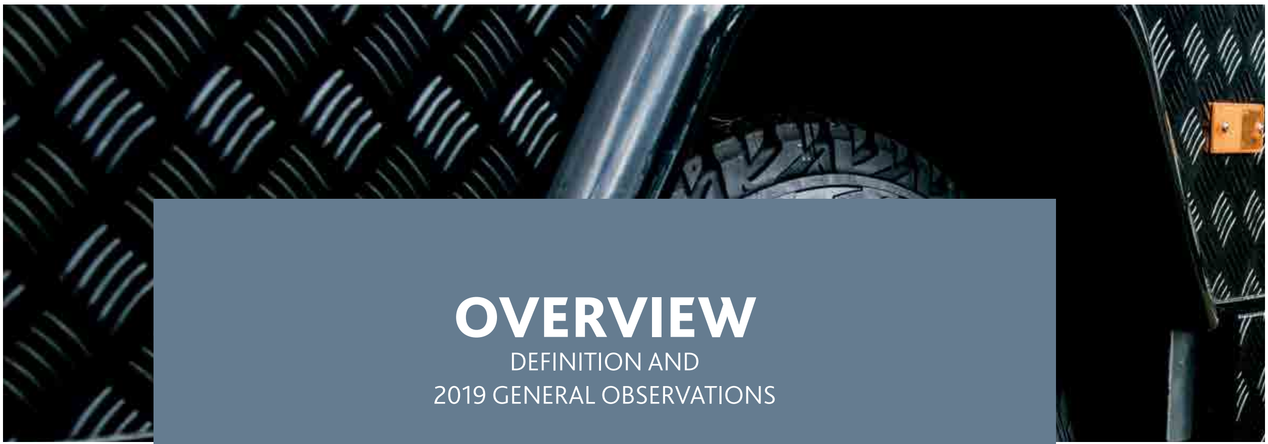
67% DIESEL

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

3 – 5 TONNES

THE MOST COMMON WEIGHT RANGE FOR REGISTERED CAMPERVANS


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



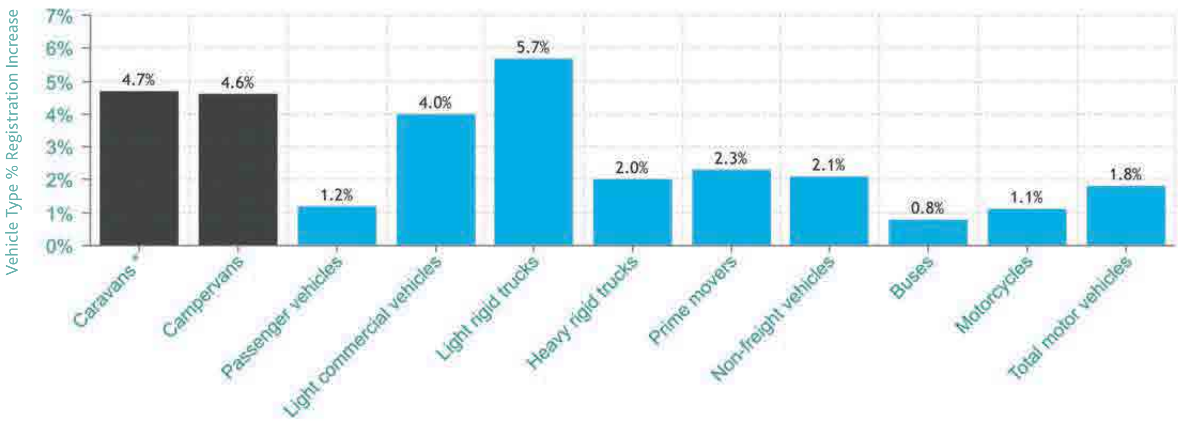
OVERVIEW

DEFINITION AND
2019 GENERAL OBSERVATIONS

WHAT ARE CARAVANS AND CAMPERVANS?

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

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



OVERVIEW

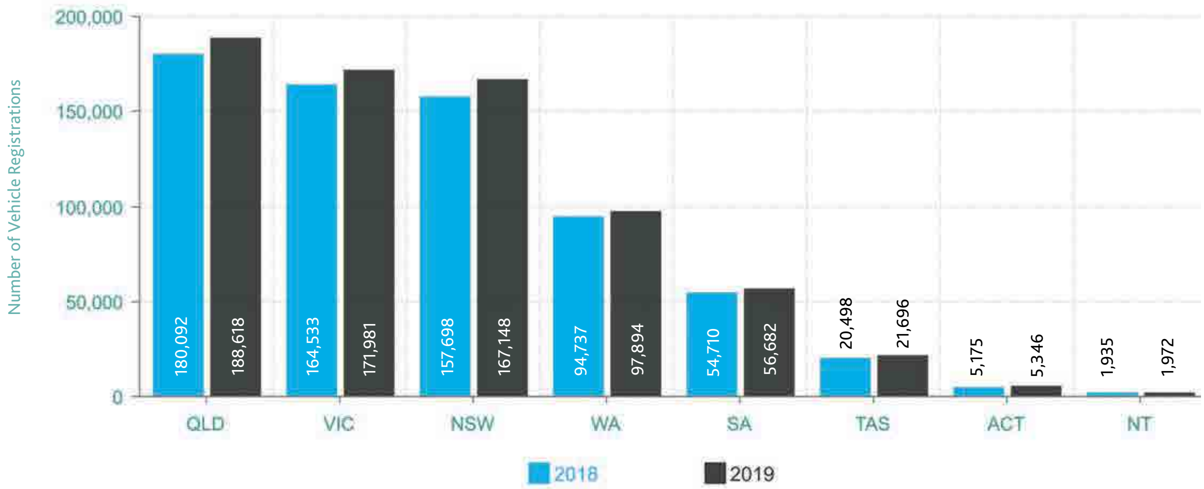
- Combined Campervan and Caravan registrations reached 711,337 at 31 January 2019.
- Comparing 2019 Campervan and Caravan registrations with 2018 shows an increase of 31,959 or 4.7% over the past year.
- **Campervans** registered in Australia at 31 January 2019 totalled 69,693 compared to 66,611 in 2018.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

TOTAL REGISTRATIONS

COMPARING 2018 V 2019 CHANGE

TOTAL REGISTERED CARAVANS & CAMPERVANS

Figure 2: Total Caravan & Campervan Registrations 2018 v 2019

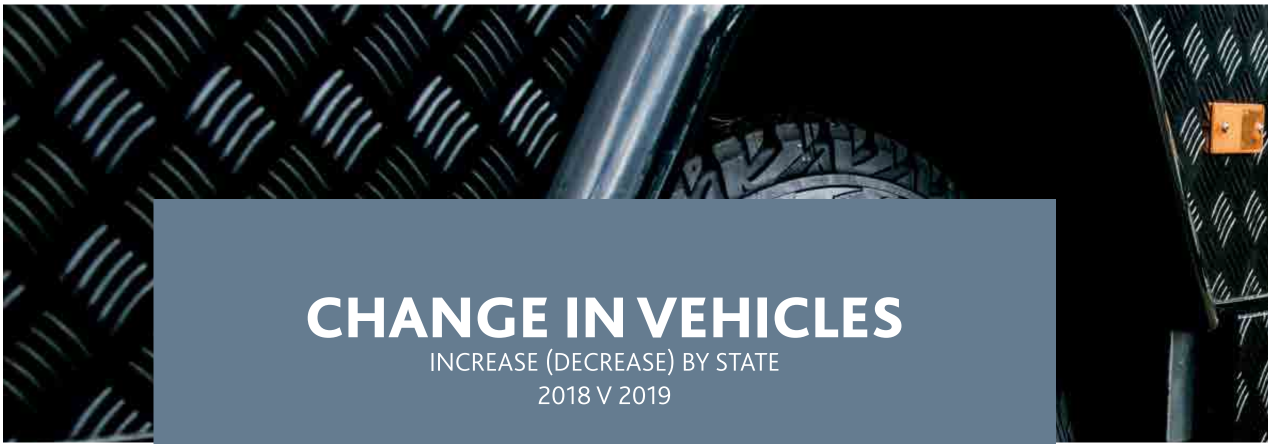


- Queensland continues to have the largest fleet of Caravans and Campervans in Australia, with a combined total of 188,618 vehicles, equating to 26.5% of all recreational vehicles in Australia.
- New South Wales outperformed Queensland for the highest overall increase in total registrations of Caravans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

Since 2014 there has been a

27.7%

Increase in the number of registered caravans and campervans in Australia

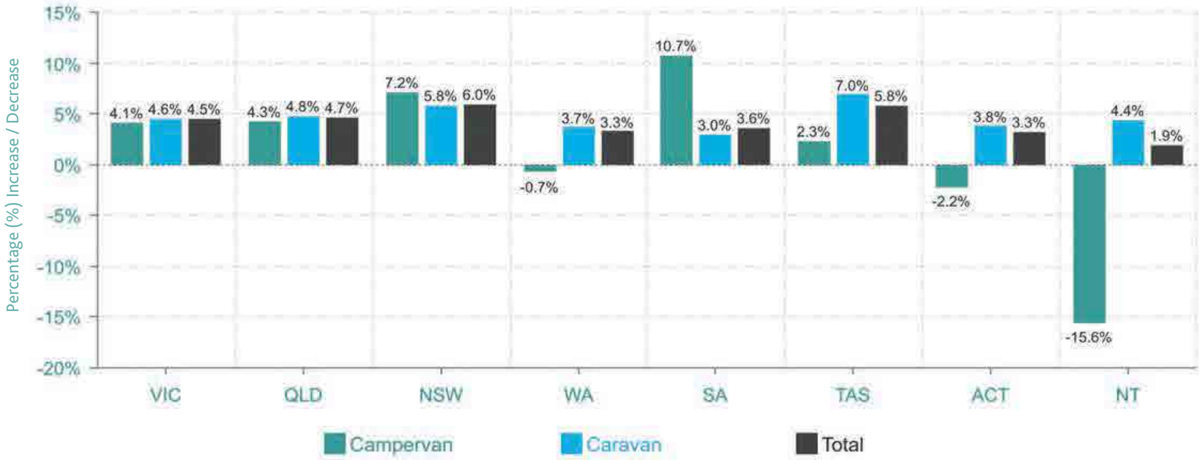


CHANGE IN VEHICLES

INCREASE (DECREASE) BY STATE
2018 V 2019

PERCENTAGE (%) CHANGE IN REGISTERED VEHICLES

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



4.7%
Caravans
% Change 2018 v 2019

4.6%
Campervans
% Change 2018 v 2019

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

PER CAPITA REGISTRATIONS

CARAVAN AND CAMPERVAN REGISTRATIONS PER 1,000 PEOPLE

2018

2.7 Campervans Per 1,000 People

Caravans Per 1,000 People 24.6

2019

2.8 Campervans Per 1,000 People

Caravans Per 1,000 People 25.4

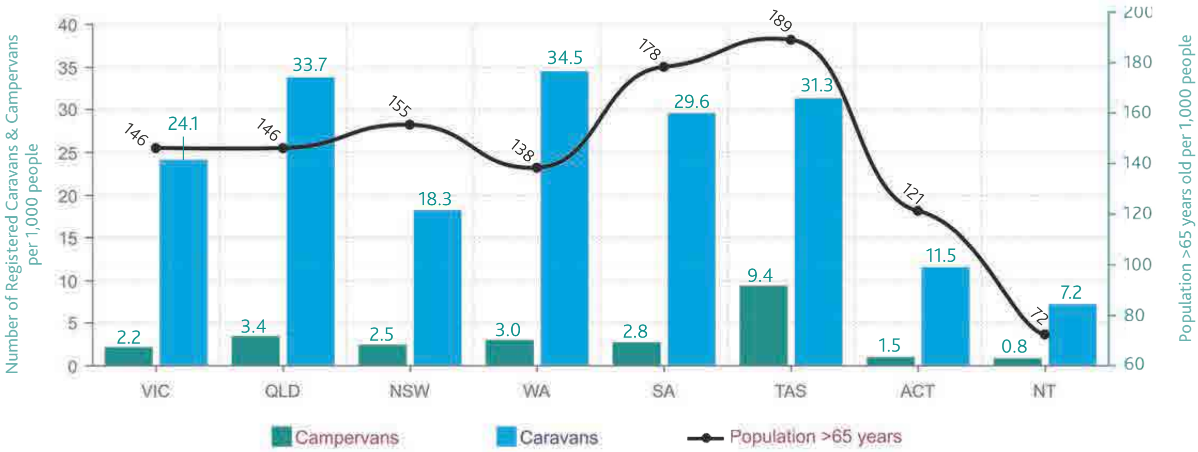
Figure 4: Total Caravan and Campervan Registrations per 1,000 people 2018 v 2019

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

POPULATION OVER OVER 65

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

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



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

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

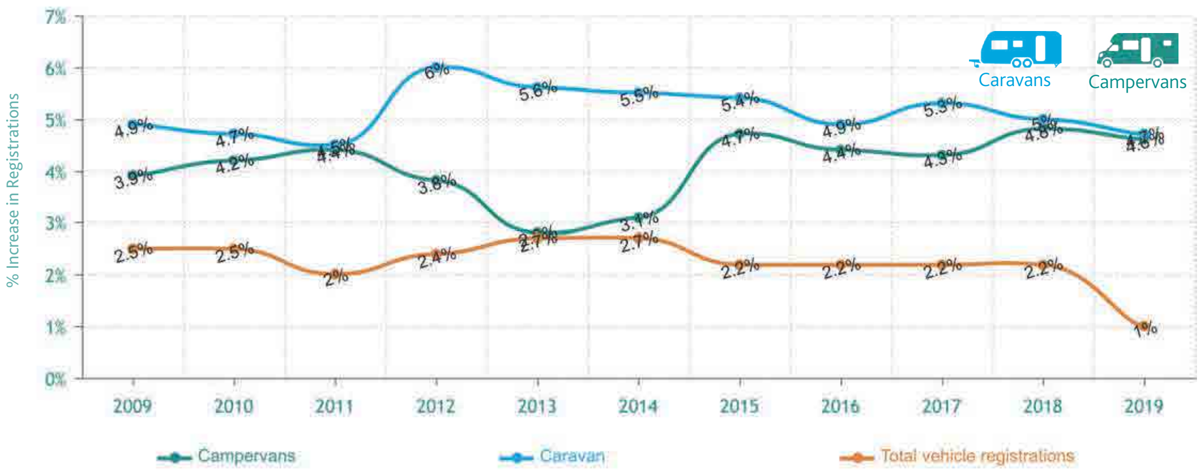
ANNUAL MOVEMENT

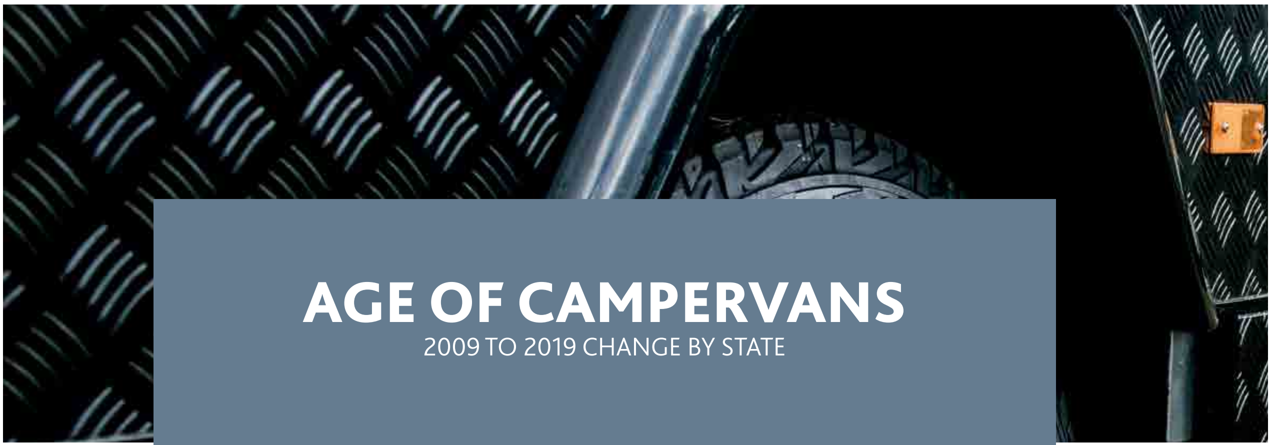
% CHANGE IN CARAVANS, CAMPERVANS AND TOTAL MOTOR VEHICLES

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

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

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

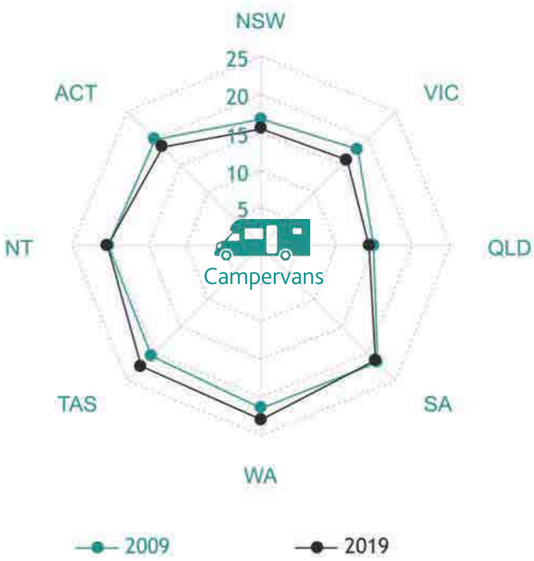




AGE OF CAMPERVANS

2009 TO 2019 CHANGE BY STATE

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



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

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

Western Australia has the oldest Campervans on average at 22.9 years

AGE OF CAMPERVANS

NATIONAL TREND 2009 TO 2019

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

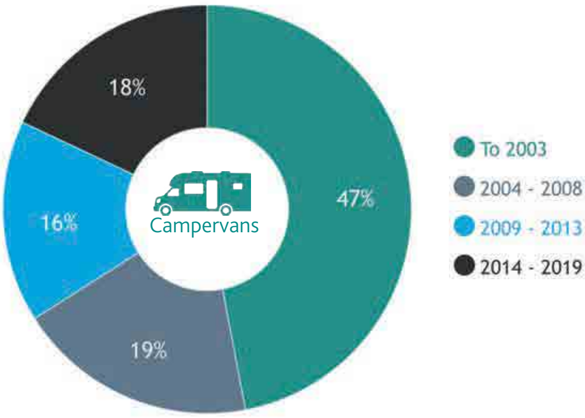
87% of all Campervans manufactured after 2014 reside in either NSW, VIC or QLD

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

MANUFACTURE PERIOD

REGISTERED CAMPERVANS

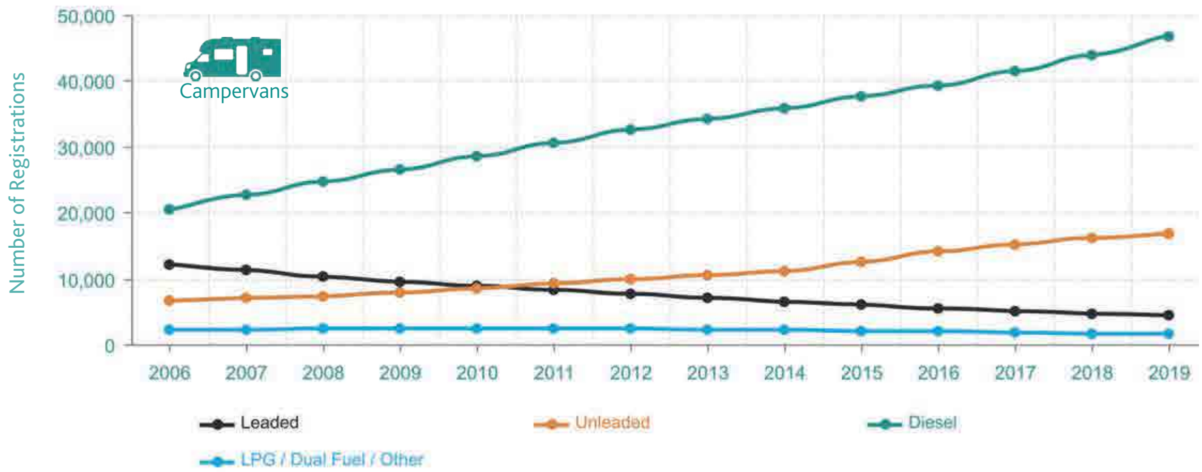
Figure 9: Registered Campervans % by Period of Manufacture

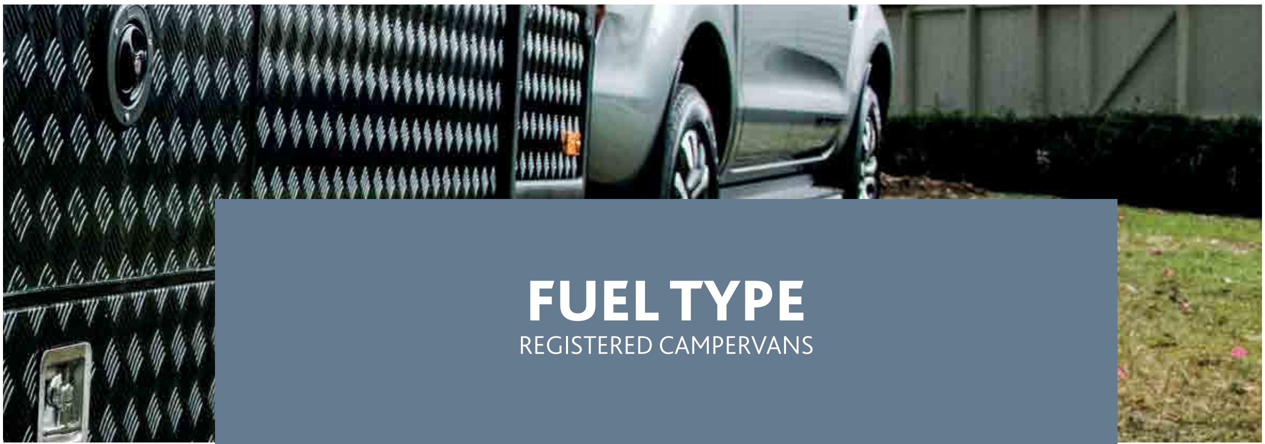


66% of Western Australia's Campervans were manufactured before 2003, with only 18% being manufactured in the past 10 years

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

Figure 10: Campervan Registrations by Fuel Type 2006 to 2019



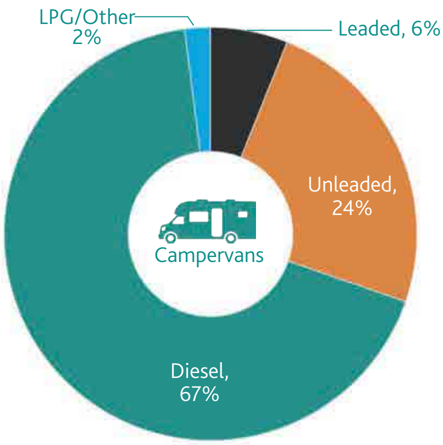


FUEL TYPE
REGISTERED CAMPERVANS

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

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

Figure 11: Campervans by Fuel Type

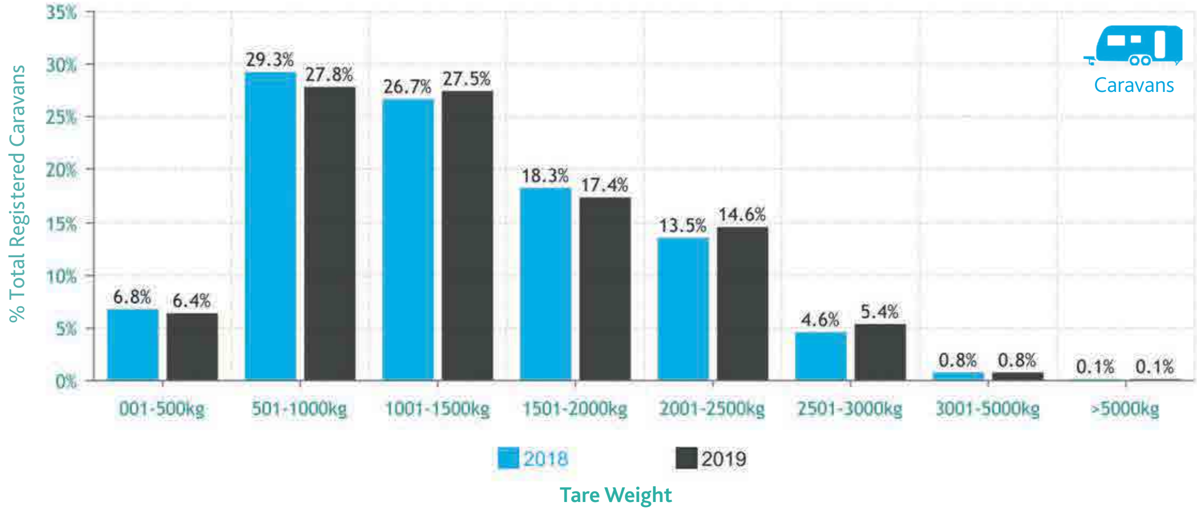


- Diesel continues to emerge as the most popular fuel type for Campervans with 67% of all registered Campervans using diesel. By way of comparison, in 2009, 57% of all registered Campervans were on diesel, representing a market share increase of 10% over the past 10 years compared with other fuel types.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

WEIGHT CLASS

CARAVANS

Figure 12: Caravan % Population by Weight Class



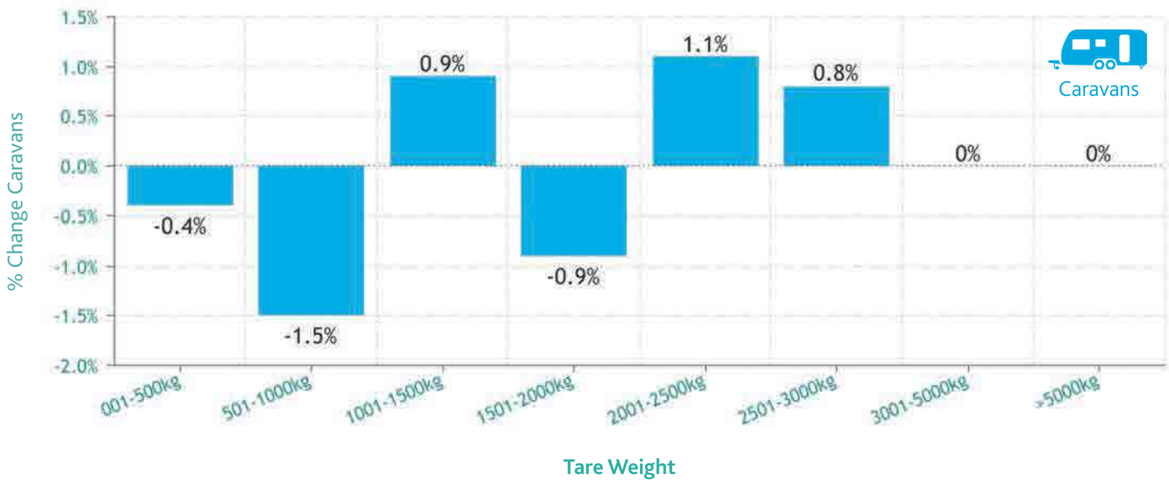
Caravans are getting heavier with those weighing over 2 tonnes growing by 1.9% in 2019

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

WEIGHT CLASS MOVEMENT

CARAVANS

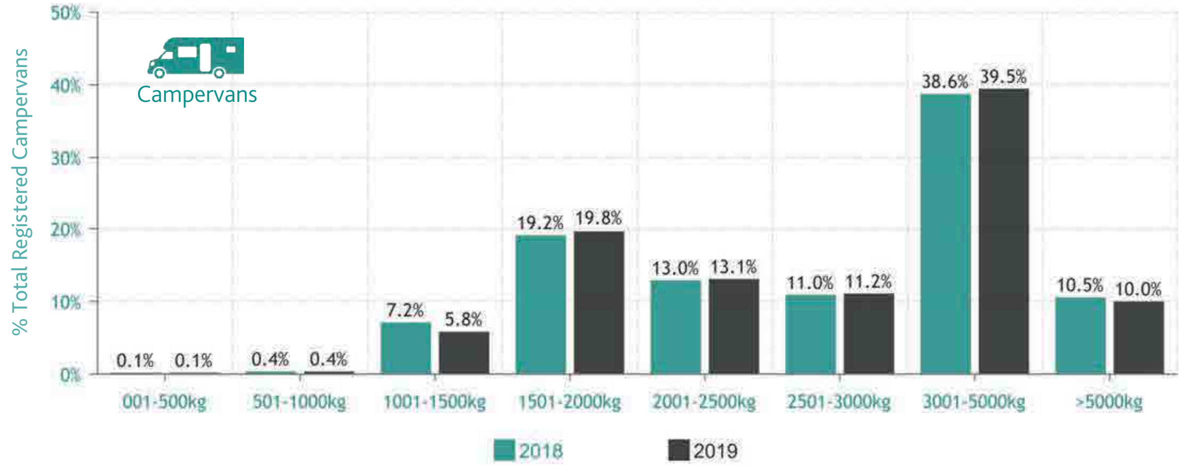
Figure 13: Caravan Population % Change in Weight Distribution from 2018 to 2019



WEIGHT CLASS

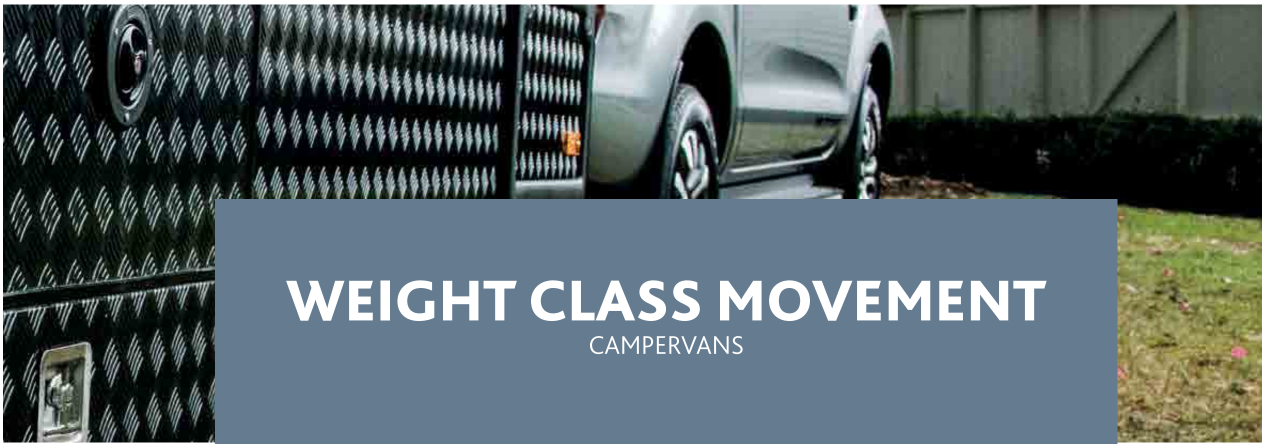
CAMPERVANS

Figure 14: Campervan % Population by Weight Class



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

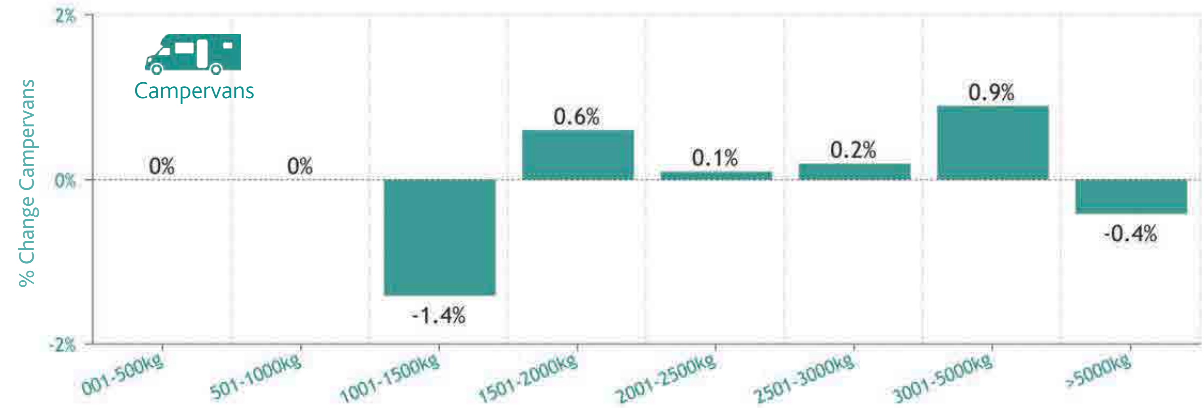
- Figure 14 above identifies the distribution of weight class among all registered Campervans. The 3-5 tonne category represents the largest weight classification, accounting for 39.5% of all registered Campervans.
- While 3 - 5 tonnes represent the largest weight class in terms of number of registered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

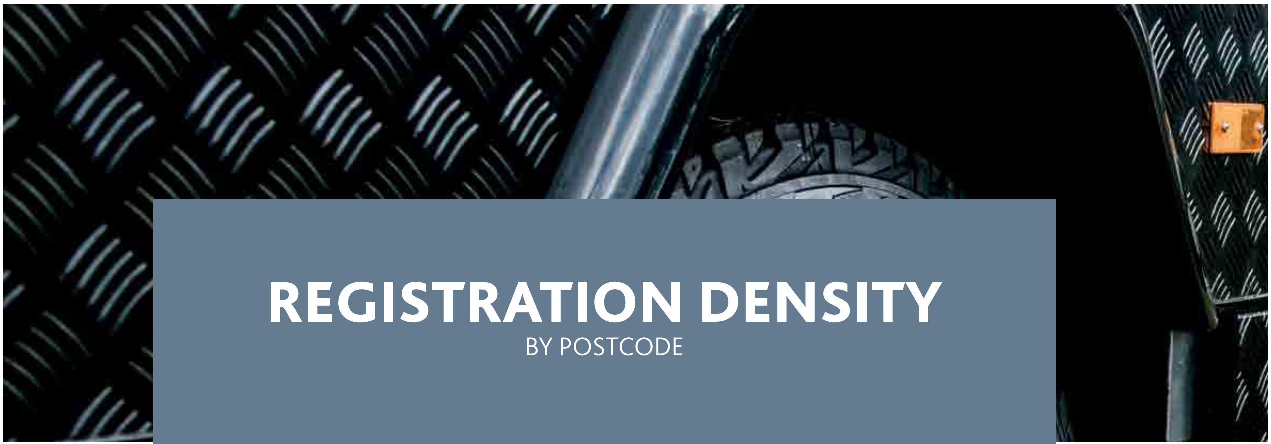


WEIGHT CLASS MOVEMENT

CAMPERVANS

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

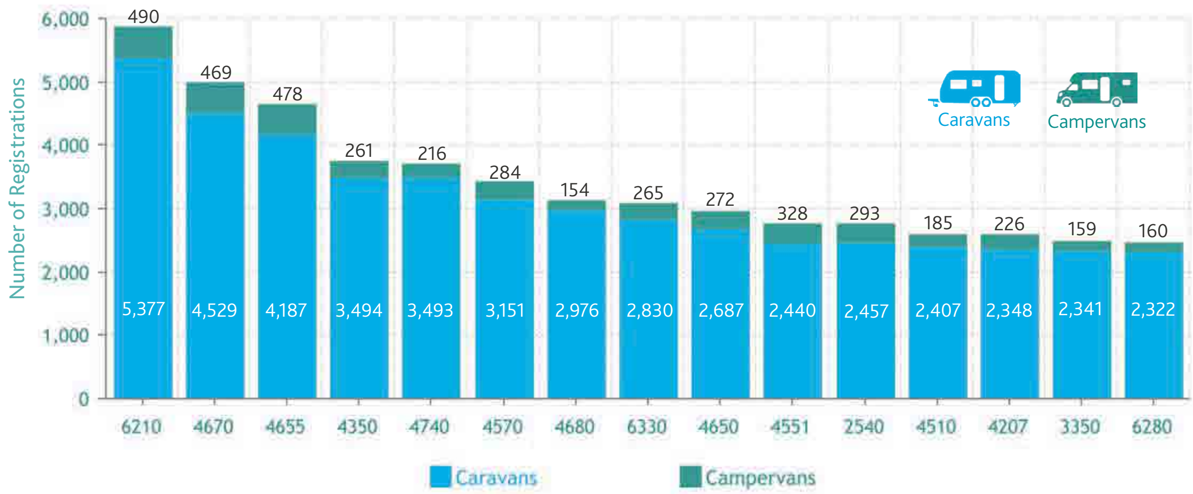




REGISTRATION DENSITY

BY POSTCODE

Figure 16 Registration Density by Top 15 Postcodes in 2019



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

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

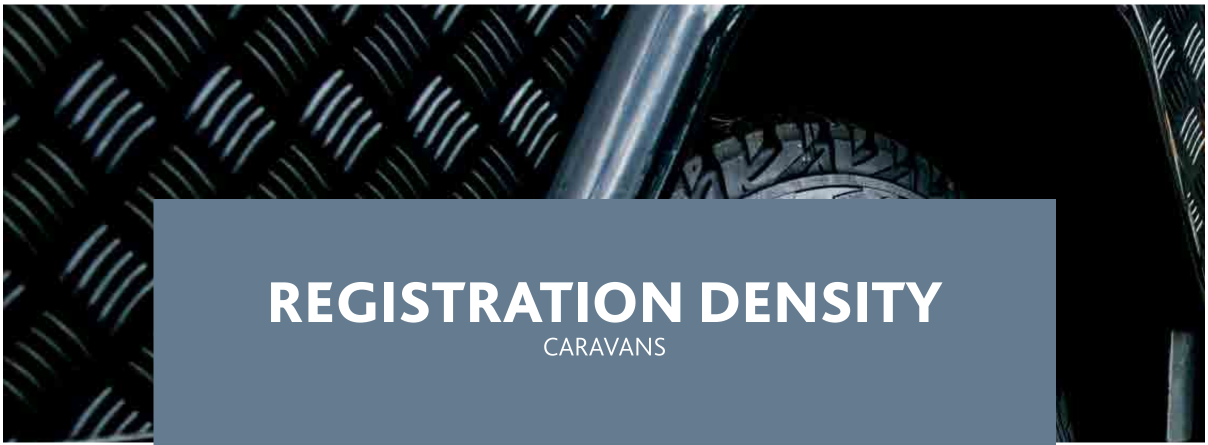
REGISTRATION DENSITY

CAMPERVANS

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

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

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



REGISTRATION DENSITY

CARAVANS

Figure 18 Registration Density by Top 15 Postcodes in 2019

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

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

EXTRACT OF ABS DATA

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

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

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

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

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

Source: ABS Catalogue 9309.0; Motor Vehicle Census

EXTRACT OF ABS DATA

Campervan and Caravan Registrations per 1,000 People

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

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

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

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

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

Source: ABS Catalogue 9309.0; Motor Vehicle Census

APPENDIX 2.1 DOMESTIC QUARTER UPDATE – JUNE 2019

Caravan Industry Association of Australia

Domestic Tourism Snapshot

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

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

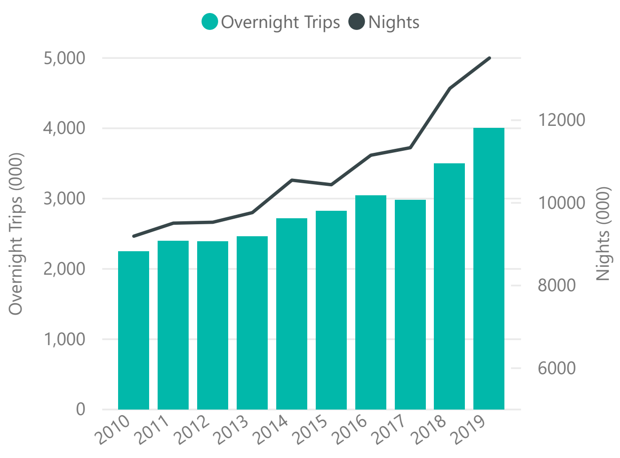
Caravan and Camping Visitor Economy Performance

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

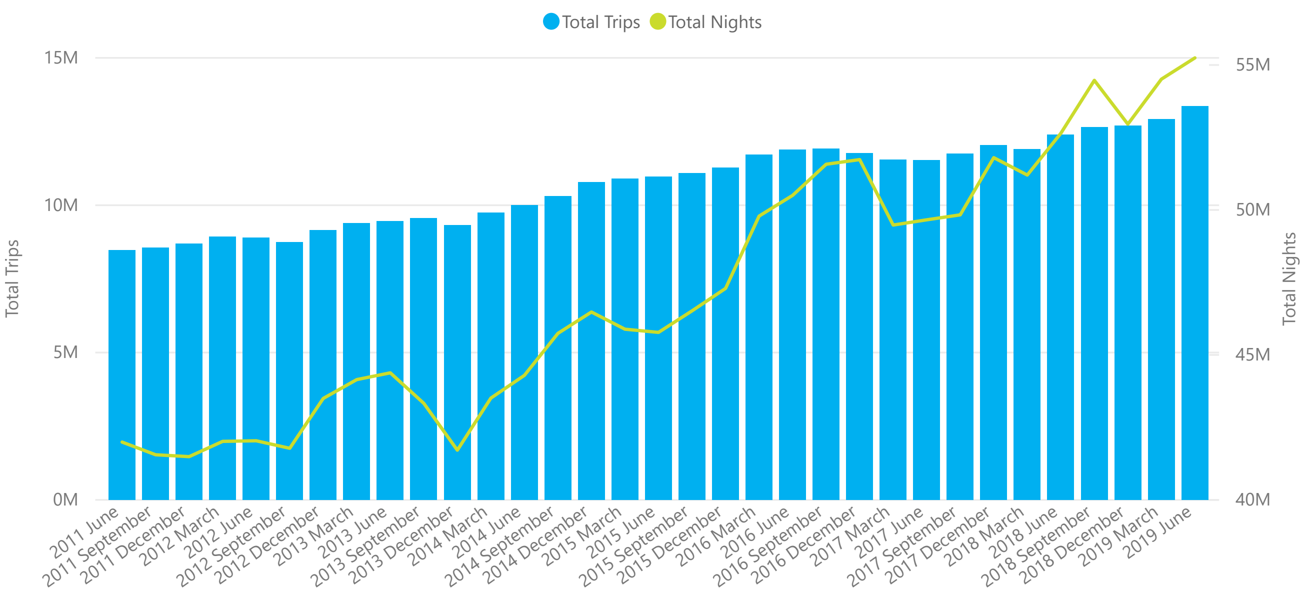
The June quarter proved to be the best performing June quarter for a decade, in part because the entire Easter weekend fell in April, with the proximity of ANZAC day offering extended holiday opportunities. The June quarter saw growth of 14% in terms of trips and a 5.7% increase in nights.

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

Total Nights and Visitors in the June Quarter



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



Data Source: Tourism Research Australia, NVS, 2019

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

Caravan Industry Association of Australia

Y/E June 2019 Domestic Snapshot

Data Source: Tourism Research Australia, NVS, 2019

State and Territory Analysis (Rolling Annual)

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

State and Territory Visitor Economy Performance

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

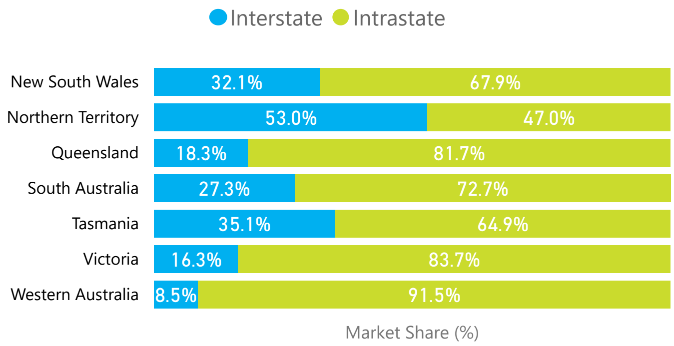
By marketshare, there continues to be consistent increases from South Australia, which now features in 9.1% of domestic caravan and camping trips (up from 8.2% in 2018). Victoria also gained 0.9ppt to capture 24.4% of caravan and camping trips, boosted by a continually strong intrastate market. These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

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

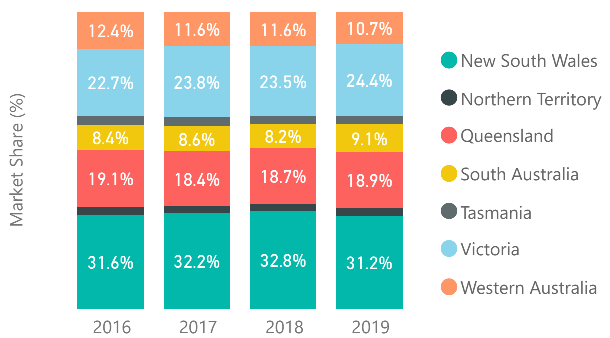
State Seasonality Trends (Total Trips and Percentage of Overnight Trips per Quarter)

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

Origin of Caravan and Camping Visitors



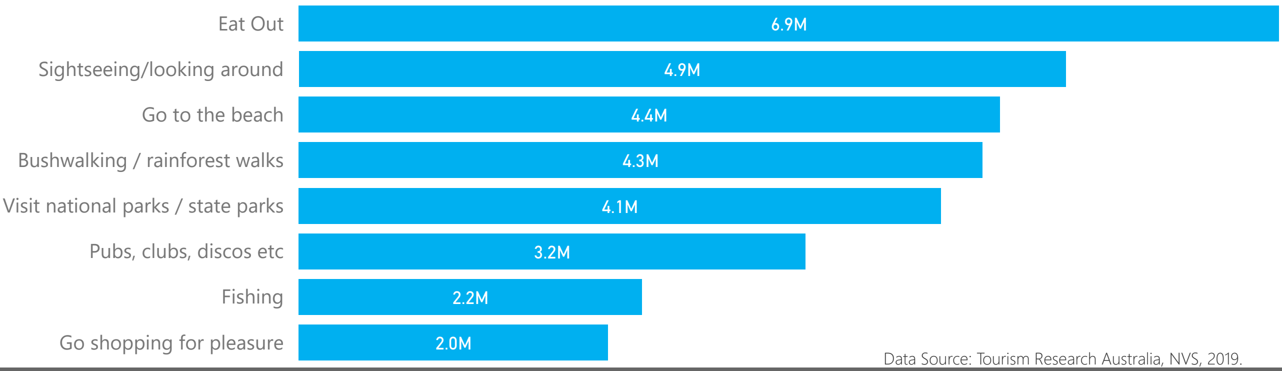
Overnight Trips by State: Rolling Annual (Market Share)



Caravan Industry Association of Australia

Y/E June 2019 Domestic Snapshot

Domestic Caravan and Camping Top 8 Activities (Overnight Trips)



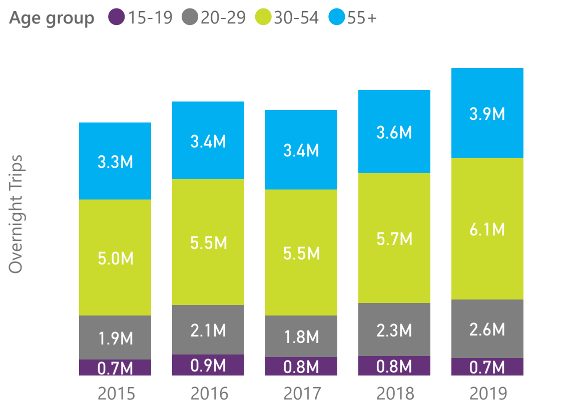
Data Source: Tourism Research Australia, NVS, 2019.

Caravan and Camping Visitor Demographics

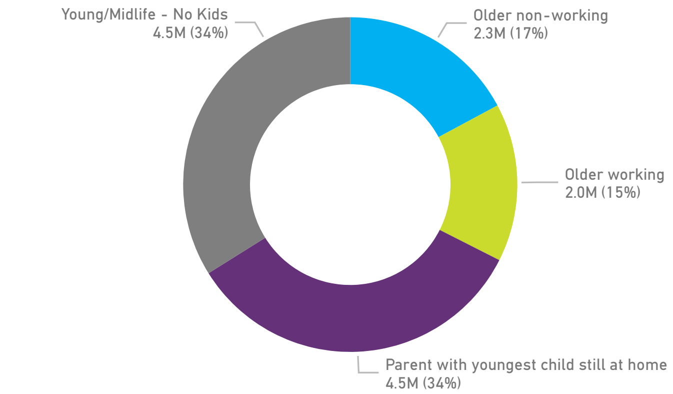
For the year-ending June 2019, 6.9M caravan and camping trips involved eating out at a cafe or restaurant, again making it the most popular activity. The remaining 4 of the top 5 most popular activites for visitors are nature-based, highlighting the continued role these attractions play in visitor experiences.

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

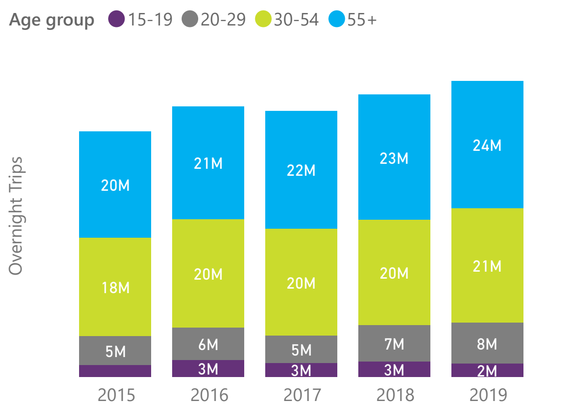
Domestic Caravan and Camping Trips (Age)



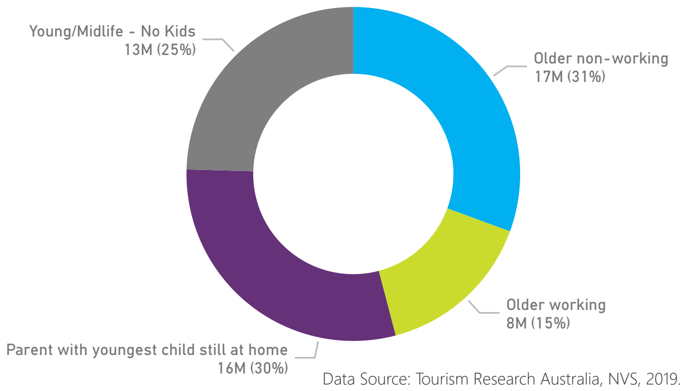
Domestic Caravan and Camping Trips (Lifecycle Groups)



Domestic Caravan and Camping Nights (Age)



Domestic Caravan and Camping Nights (Lifecycle Groups)

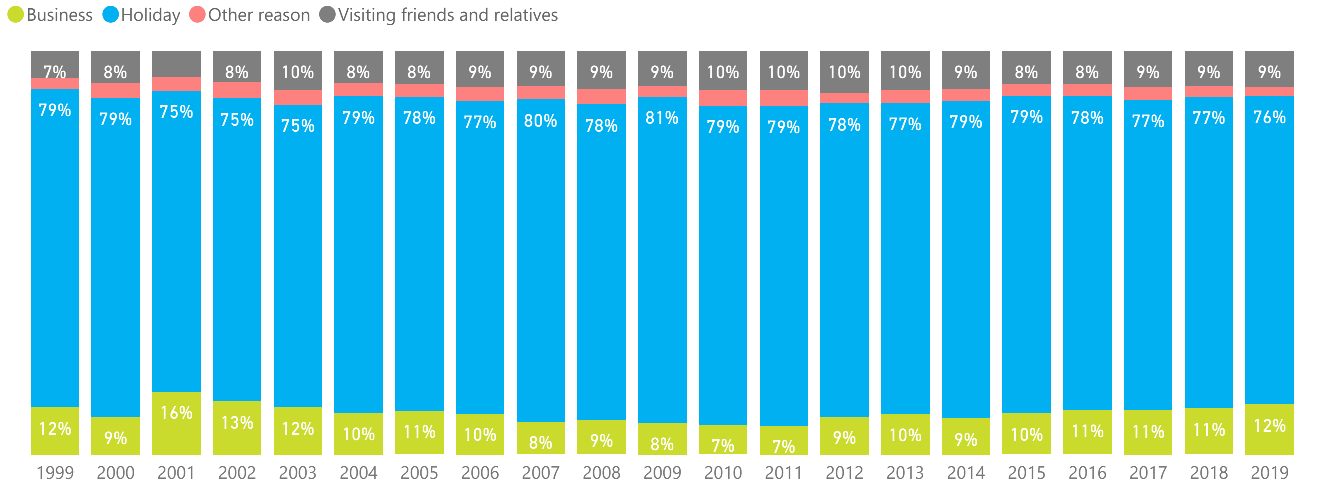


Data Source: Tourism Research Australia, NVS, 2019.

Y/E June 2019

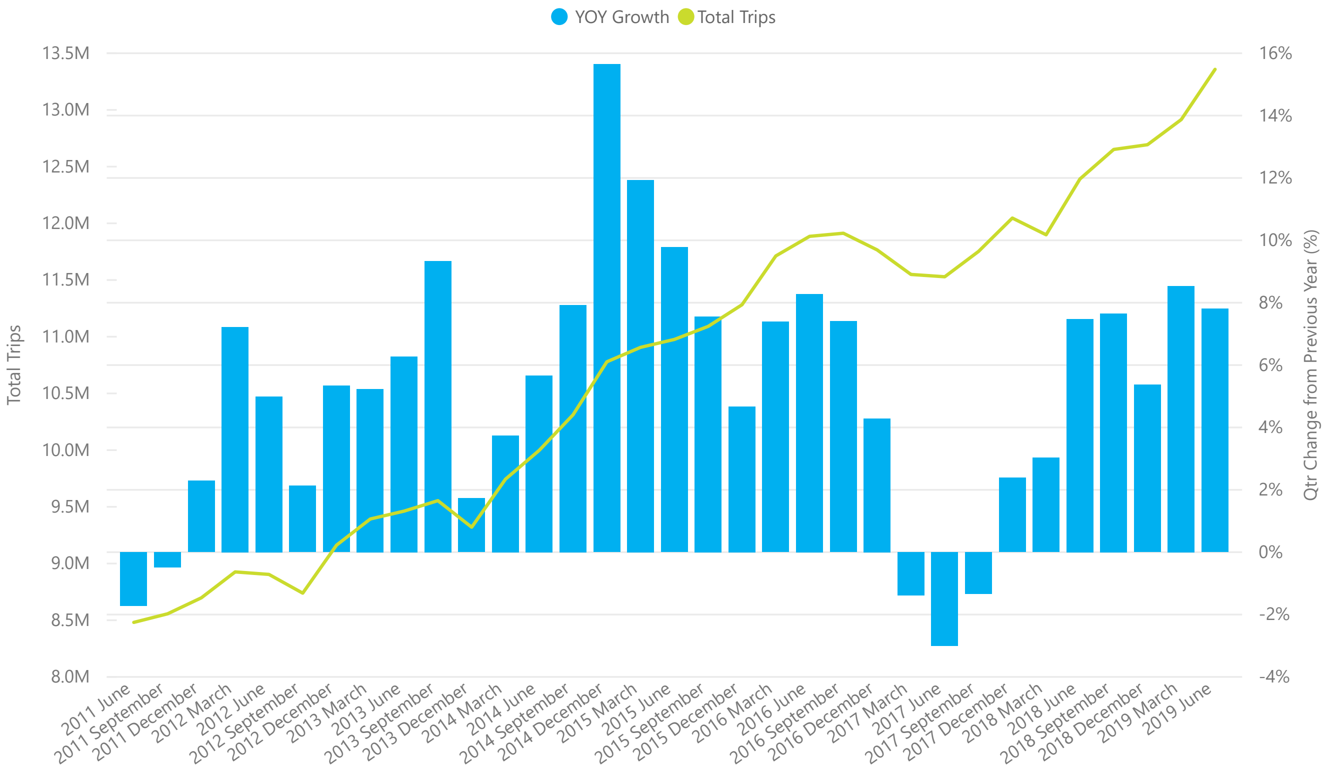
Domestic Snapshot

Reason for Travel by Caravan and Camping Overnight Trips



Data Source: Tourism Research Australia, NVS, 2019.

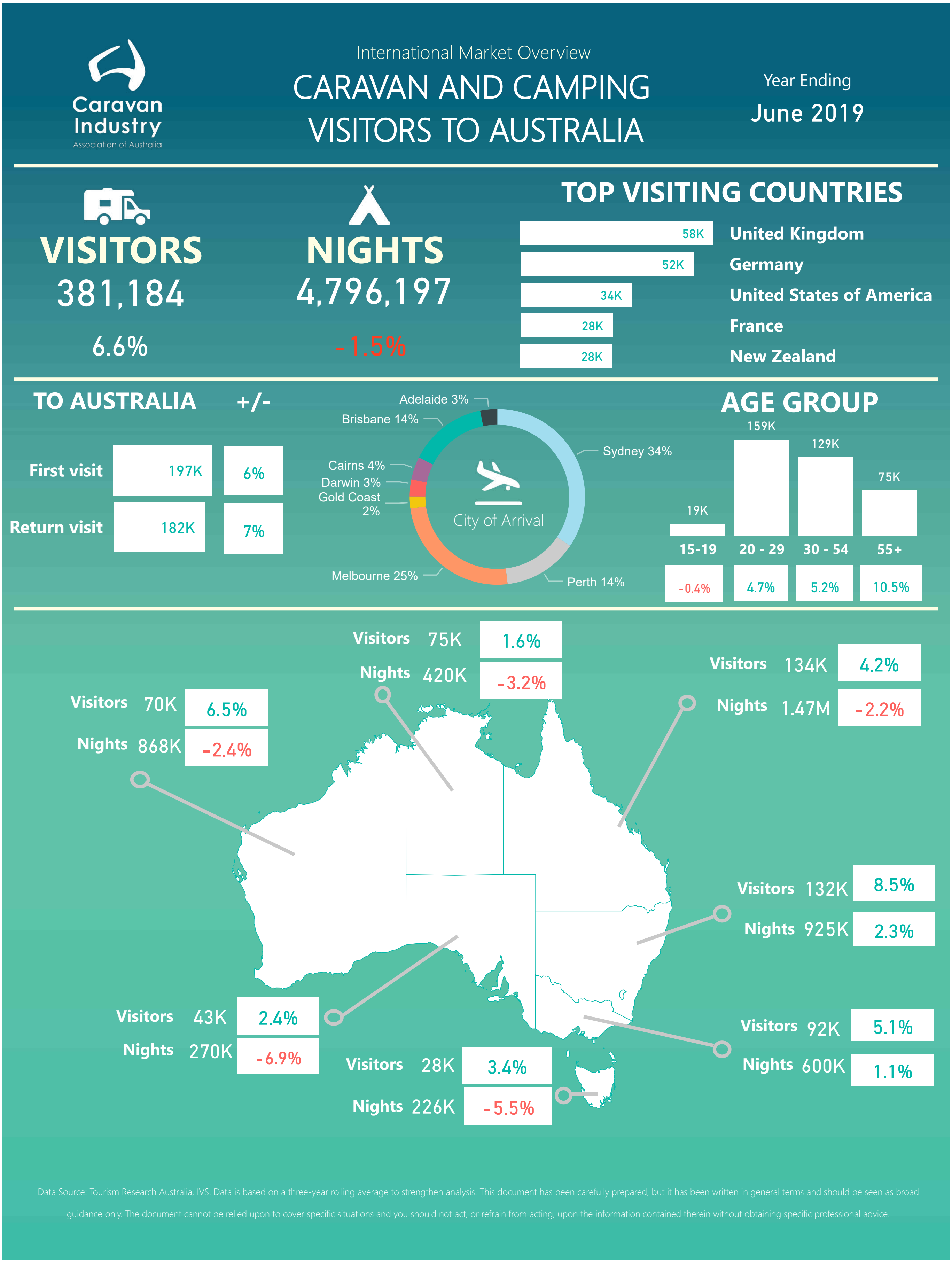
Domestic Caravan and Camping Visitor Trips (Rolling Annual) and Qtr Percentage Change on Previous Year



Data Source: Tourism Research Australia, NVS, 2019.

 TRA notes to use caution when comparing 2019 NVS estimates with earlier years. The move to 100% mobile phone interviewing has seen increases to 2019 NVS estimates which have an upward influence on growth rates.

APPENDIX 2.2 INTERNATIONAL QUARTER UPDATE – JUNE 2019



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