Appendix 4

Region: North and North East

TVIS Route 1: Heritage Highway

Main Towns: Launceston, Evandale, Longford, Hadspen, Ross, Oatlands, Bagdad

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Bowthorp Farm							C
Ross Wool Centre	•	•	•	•	•	•	C
Clarendon House				•			H
Entally House			•	•			H
Woolmers	•	•		•	•	•	H
Brickendon				•			H
Callington Mill			•		•		H
Ross Female Factory			•				H
Ross town precinct	•	•	•	•	•	•	H
Evandale town precinct	•	•	•	•	•	•	H
Oatlands town precinct	•	•	•	•	•	•	H
Longford town precinct	•	•	•	•	•	•	H
Longford Wildlife Park							N
Ben Lomand National Park					•		N

C= Cultural H= Historic N= Natural O= Other

Region: North and North East

TVIS Route 2: East Coast

Main Towns: Launceston, Scottsdale, St Helens, Fingal, St Marys, Bicheno, Coles Bay, Swansea

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
East Coast Bark Mill	•	•	•	•	•	•	C
East Coast vineyards	•	•	•	•	•	•	C
Healey’s Pyengana Cheese Factory				•			C
Stawberry Farm				•			C
Derby Tin Mine	•		•		•	•	H
Pioneer Working Horse Museum			•				H
St Helens History Room			•				H
Bicheno Sealife Centre	•	•	•	•	•	•	N
Douglas Apsley National Park			•	•			N
East Coast Bird/Animal Park	•	•	•	•	•	•	N
Evercreech Forest Reserve				•	•		N
Freycinet National Park/Lodge	•	•	•	•	•		N
Friendly Beaches		•	•	•	•		N
Maria Island National Park		•		•	•		N
Meetus Falls				•			N
Mt William National Park		•		•	•		N
Penquin Rookery		•	•	•			N
Ralphs Falls				•			N
St Columba Falls				•			N
Various coastal reserves			•	•			N
Waubs Bay Harbour Cruise		•	•	•	•		N

C= Cultural H= Historic N= Natural O= Other

Region: South

TVIS Route 3: Tasman

Main Towns : Richmond, Sorell, Dunalley, Taranna, Port Arthur, Nubeena

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Bush Mill	•	•	•	•	•	•	**C**
Horsedrawn coaches (Richmond)			•	•	•	•	**C**
Richmond town precinct	•	•	•	•	•	•	**C**
Swing Bridge			•				**C**
Vineyards		•	•	•			**C**
Port Arthur	•	•	•	•	•	•	**H**
Richmond Gaol	•	•	•	•	•	•	**H**
Hobart Town Model Village	•	•	•	•	•	•	**H**
Toy Museum			•				**H**
Copping Museum		•	•	•	•		**H**
Eaglehawk Neck Office Qtrs			•	•			**H**
Tasman Monument			•				**H**
Devil Park	•	•	•	•		•	**N**
Coal Mines HS		•		•	•		**N**
Pirates Bay Lookout			•				**N**
Devils Kitchen, Tasman Arch, Waterfall Bay	•		•	•			**N**
Tesselated Pavement			•	•			**N**
Able Tasman NP inc Fortescue Bay, Cape Pillar NP, Cape Raoul		•		•	•		**N**
Remarkable Cave			•				**N**
Richmond Maze			•			•	**O**

C= Cultural H= Historic N= Natural O= Other

Region: South

TVIS Route 4: Huon Trail

Main Towns: Huonville, Geeveston, Dover, Kettering, Cygnet, Bruny Island

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Vineyards			•	•	•		C
Doran’s Jam factory		•	•	•	•		C
Possoms market			•				C
Woodfired Pottery							C
Tassal Atlantic Salmon Farm	•	•	•	•	•		C
Domeney’s Fruit Flower Farm		•	•	•	•		C
Deepings Woodturner				•			C
Margate Craft and Florist			•				C
Stanley’s Art and Craft							C
Woodbridge Hill Weaving Studio							C
Forest and Heritage Centre	•	•	•	•	•	•	H
Ida Bay railway							H
Model Train world							H
Apple Museum			•		•		H
Bruny Lighthouse				•	•		H
Snug Museum			•				H
Captain Cook Museum							H
Captains Cook landing							H
Hastings Cave and Thermal Pool	•	•	•	•	•	•	N
Huon River			•				N
Forest Drives – Arve, Hastings, Tahune	•	•	•	•	•		N
Hartz Mtn NP			•	•	•		N
SE Cape (WHA)				•			N
Talune Wildlife Park			•				N
Penguin rookeries (BI)			•	•	•		N
Snug and Pelverata Falls							N
Labillardiere Reserve							N
Snowy Range Trout Fishery		•		•	•		O
Huon River cruises							O
Huon Jet Boats			•	•	•		O
Dover Vintage Yacht cruises				•			O
Olive May cruises				•			O
Horseback Wilderness Tours				•			O
Camel Tracks Tas							O
Antarctic Offices			•				O

C= Cultural H= Historic N= Natural O= Other

Region: South/West

TVIS Route 5/6: Wild Way/Miners Way

Main Towns: New Norfolk, Hamilton, Lake St Clair, Queenstown, Strahan, Zeehan with options for National Park, Strathgordon, Bothwell, Waddamana

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Strahan visitor centre	•	•	•	•	•	•	C
Strahan town precinct	•	•	•	•	•	•	C
Queenstown town precinct	•	•	•	•	•	•	C
Glen Clyde House	•		•	•	•	•	C
Gallery West			•				C
Radfords crafts							C
Bothwell Golf museum				•	•	•	C
Bothwell town precinct				•		•	C
Hamilton town precinct	•	•	•	•	•	•	C
Old MacDonald farm					•		C
Vineyards				•			C
Waddamana Power Museum							H
Zeehan museum	•		•	•	•	•	H
Queenstown Heritage Museum			•			•	H
Waratah museum							H
Oast House			•			•	H
Redlands			•	•	•		H
Old Colony Inn			•				H
Teepookana		•	•	•	•		H
Sarah Island	•	•		•	•	•	H
Morrison huon pine mill	•	•	•	•	•	•	H
Gordon River and harbour cruises/WHA – Sarah Island, Macquarie Harbour	•	•	•	•	•	•	N
Lake St Clair visitor centre	•	•	•	•	•	•	N
Lake St Clair cruise	•	•	•	•	•	•	N
Salmon Ponds	•	•	•	•	•		N
Mt Field NP	•	•	•	•	•	•	N
South West NP				•	•		N
Lake Pedder and Lake Gordon							N
Mt Lyell Mines tour	•	•	•	•	•	•	O
Queenstown chairlift	•		•			•	O
Wee Georgie Wood steam rail			•				O
Devil jet boat	•		•	•	•	•	O
Wild River jet boats	•	•	•	•	•	•	O
Gordon River power station							O
ANM tour							O
Strahan seaplanes	•	•	•	•	•	•	O

C= Cultural H= Historic N= Natural O= Other

Region: North West and West

TVIS Route 7: Cradle

Main Towns: Sheffield, Cradle Valley, Westbury, Deloraine, Mole Creek

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Tasmazia			•			•	C
Heidi Farm Cheese			•	•			C
Black Stumps Pioneer Settlement							C
Sheffield town precinct and murals	•	•	•	•	•	•	C
Arts and crafts places		•	•		•	•	C
Pearns Steam World Museum			•				H
Cradle Mtn visitor centre	•	•	•	•	•	•	N
Caves – King Solomon, Marakoopa , Wild	•	•		•	•		N
Gunns Plains Caves				•			N
Trowunna Wildlife Park		•				•	N
Cradle Mtn	•	•	•	•	•	•	N
Forest Reserves				•			N
Mt Roland							N
Great Lake							N
Paradise Park Deer Farm			•				O
Redwater Creek Steam Rail			•				O
Lake Barrington			•		•		O

C= Cultural H= Historic N= Natural O= Other

Region: North West and West

TVIS Route 8: Coasts and Farms

Main Towns: Devonport, Burnie, Stanley

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Rasberry farm	•	•	•	•	•	•	C
Taswegia							C
Geminica							C
Stanley town precinct	•	•	•	•	•	•	C
Tiagarra Aboriginal Art		•	•	•	•		C
Art and craft centres			•	•			C
Woolnorth					•		H
Don River Railway	•	•	•	•	•	•	H
Maritime museum			•				H
Pioneer Village museum			•				H
Highfield		•	•	•	•		H
Home Hill			•				H
Court House			•				H
Joe Lyons Cottage			•				H
Stanley museum			•				H
Ellis House			•				H
Plough Inn			•				H
Various Gardens		•			•		N
Aboretum			•				N
Penquin rookery tour		•	•	•			N
The Nut	•	•	•	•	•	•	N
Asbestos Range NP		•	•	•	•		N
Rocky Cape NP			•				N
Milkshakes FR							N
Dip Falls FR							N
Leven Canyon		•		•	•		N
Liffey Falls				•			N
Oldina FR			•	•			N
Farms – emu, ostrich, deer			•				O
Orchards – Auro			•				O
Arthur River cruise				•			O
Pieman River cruise				•	•		O
Scenic flights							O
Lactos Cheese			•				O
AMCOR			•				O
Tascot Templeton			•				O
Lacrum Farm and factory			•				O

C= Cultural H= Historic N= Natural O= Other

Region: North and North East

TVIS Route 9: Tamar

Main Towns: Launceston, Low Head, Georgetown

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Tamar Wine Route	•	•	•	•	•	•	C
Lalla woolshed			•	•	•		C
Arts and crafts outlets							C
Low Head Maritime Museum/ Piolt Station		•	•	•	•		H
Grubb Shaft Museum	•	•	•	•	•	•	H
The Grove			•				H
Original Coles Store (Wilmot)							H
Penquin tour		•	•	•			N
Walker Rhododendron			•	•	•		N
Rosevears Waterbird Haven			•				N
Tamar Island		•	•	•			N
Hollybank FR			•				N
Lavender Farm	•	•		•	•		O
Fruit farms			•				O
Comalco, BHP and Temco			•				O

C= Cultural H= Historic N= Natural O= Other

Region: South

Major Destination: Hobart

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Casino	•	•	•	•	•	•	C
Antarctic Adventure	•	•	•	•	•	•	C
Tasmanian Museum	•	•	•	•	•	•	C
Maritime Museum		•	•		•	•	C
Sullivans Cove precinct	•	•	•	•	•	•	C
Salamanca market	•	•	•	•	•	•	C
Battery Point precinct		•	•	•	•	•	C
Art Galleries				•		•	C
Moorilla Vineyard		•	•	•	•	•	C
Time Warp House			•	•	•	•	C
Cascade Tours		•	•	•	•	•	H
Shot Tower	•				•	•	H
Runnymede		•	•	•	•	•	H
Narryna			•	•		•	H
Kangaroo Bluff			•				H
Mt Nelson Signal Station	•		•			•	H
Anglesea Barracks		•	•		•	•	H
Female Factory		•	•		•		H
Penitentiary Chapel and Courts			•				H
Historic walks		•	•	•	•	•	H
Botanical Gardens	•	•	•		•	•	N
Bonorong Park	•	•	•	•	•	•	N
Scenic Flights SW		•	•	•	•	•	N
Mt Wellington	•	•	•	•	•		N
Cartela Cruises			•	•		•	O
The Cruise Company	•	•	•	•		•	O
Cadbury Tours	•		•		•	•	O
Gasworks Distillery			•			•	O
Alpenrail					•	•	O
Transport Museum			•				O
Tudor Court						•	O

C= Cultural H= Historic N= Natural O= Other

Region: North

Major Destination: Launceston

Attraction Name	Size	Potential	Location	Fit	Strengths	Services	Category
Grindelwald			•			•	C
Country Club Casino	•	•	•	•	•	•	C
Queen Victoria Museum/Planetarium	•	•	•	•	•	•	C
Waverley Woollen mills		•	•	•	•		C
Roman Baths			•		•	•	C
Launceston city centre	•	•	•	•	•	•	C
Auto museum			•				H
Franklin House			•				H
Macquarie House			•				H
Cataract Gorge	•	•	•	•	•	•	N
Tamar River		•	•	•		•	N
Launceston Lakes Wildlife Reserve							N
Lady Selfox cruise			•			•	O
City Park and monkey island			•				O
Penny Royal	•	•	•		•	•	O
Coats Paton			•				O
Tas Honey Co			•				O
Tamar Knitting			•				O

C= Cultural H= Historic N= Natural O= Other

Appendix 5

Holiday Planner – Listed Events

month	event	
September	Blooming Tasmania Tasmanian Tiger: Mystery of Thylacine Tasmania's Open Garden Scheme	National Trust Open House and Garden Day Tasmanian Bear Fair Tulip Festival
October	Spring Orchid Show Burnie Show Sheffield Daffodil Show Tullah Chop Royal Launceston Show Huon Valley Classic Wynyard Tulip Festival The Great Bronte Tie-In Frogmore Fair	Richmond Village Fair Annual Jazz West Festival Tamar River Festival Cygnet Festival Royal Hobart Show Burnie Arts and Paper Festival Derby River Derby National and World Lefthanded Golf Tournament Tasmanian Craft Fair
November	Trout 2000 Melbourne to Stanley Yacht Race Rose and Iris Show Tullah Challenge Sculpture by the Sea Historic Homes Day Latrobe Town and Country Fair Wildflower Gardens Show North West Food Festival	Point to Pinnacle Road Run and Walk Longford Village Green Garden Fair Sounds of Tasmania Jazz Festival Spring Rose Show Tin Miners Marathon Gold Rush/ Food and Wine Fair Australian Wooden Boat Festival Devonport Agricultural Show Swansea Fun Fish
December	Theatre in the Gardens Marathon Bruny Island Sydney – Hobart Yacht Race Latrobe Wheel and Gift Launceston Christmas Carnival Bridestowe Estate Lavender Farm	Melbourne to Devonport Yacht Race Melbourne to Hobart Yacht Race Taste of Tasmania Hobart Summer Festival Boxing Day Regatta
January	King of the Derwent Yacht Race Huon Folk Music Festival Tamar Valley Folk Festival Sandy Bay Regatta	Devonport Multicultural Festival Tour of Tasmania Festivale
February	Basin Rock Concert and Youth Festival Devonport Dahlia Festival Velocipede Society Century Ride A Night at the Gorge Lavender Harvest Festival Evandale Village Fair and Penny Farthing Championships	Clarendon Road Race and Nile Ten Mile Fingal Valley Coal Shovelling Launceston Regatta Pipers Brook Concert Skyrace Tasmania

Holiday Planner – Listed Events (continued)

month	event	
March	Bothwell Highland International Spin-In King Island Show Steamfest Rosebery Miners, Axeman, Bush and Blarney Festival Taste of Huon	Estia Greek Festival St Patrick’s Festival Piners Festival Bream Creek Show Evandale Show Devonport Regatta
April	Three Peaks Race Tasmanian Heritage Festival	Targa Tasmania Season of Entertainment and Romance
May	Agfest	Channel Autumn Festival

Appendix 6

Australian Attractions Benchmarking project[35]

National Benchmarking Standards

In response to the need to promote the attractions sector, the attractions benchmarking project was set up by Tourism New South Wales and the National Office of Tourism.

Deloitte Touche Tohmatsu was commissioned to prepare a guide to accounting and performance reporting for the attractions industry in order to provide reliable financial and competitive performance information relating to the sector.

There are four prime objectives for this guide:

- Provide an integrated world class financial reporting system which can be used by both small and large operators
- Enable operators to produce relevant and reliable financial information for use in decision making
- Enhance the quality of financial information available to potential investors and financiers
- Create an environment in which operators can better assess their performance relative to others in the industry through the use of benchmarking

The guide defines attractions in three categories:

1. Amusement & Recreational Parks:

Rides and attractions, theme parks, water parks and games centres.

2. Cultural/ Educational Facilities:

Historic, Museums, Galleries, Heritage and Scientific.

3. Nature Related Facilities:

Zoos, Gardens, Aquariums, Cruises, Natural Attractions

Background

The attractions industry in Australia fulfils a number of important roles in Australia's leisure and tourism markets, however there are no comprehensive policies regarding tourist attractions at the Commonwealth, State or Regional level. The sector is not well recognised by many tourism industry participants – especially industry lobby groups.

For operators who wish to participate, Deloitte will establish a database on the Internet to assist attractions, to benchmark data, and to identify industry standards.

Performance indicators are categorised under the broad categories of:

- Visitor statistics
- Revenue based indicators
- Expenditure based indicators
- Productivity indicators
- Profitability indicators
- Liquidity and financial stability ratios

Findings from the Interstate research:

Attractions provide an important stimulus for drawing visitors, but:

- It is a fragmented industry
- Lack of valuable industry wide information
- Difficult to assist industry without information
- Difficult for operators to improve performance
- Low profitability

Also the following practical implications apply:

- Little strategic planning
- No direct support from government
- Problems raising finance (cash flow lending)
- Operational inefficiencies

For further information see:
www.attractionsbenchmark.com.au

[35] *A guide to accounting and performance reporting for the attractions industry & performance reporting and benchmarking in the attractions sector, by Deloitte Touche Tohmatsu, 1998.*

Appendix 7

Assessment of Major Attractions by BDA Market Typologies

Key Attractions	Big Tour	Grand Tour	Country Escape	Fly and Stay	Short Tour
Route Heritage Highway					
Ross Wool centre	H	H	L	L	H
Woolmers	H	H	M	L	H
Ross precinct	H	H	L	L	H
Evandale precinct	H	H	H	L	H
Oatlands precinct	H	H	L	L	H
Longford precinct	H	H	M	L	H
Route By the Sea (East Coast)					
East Coast Bark Mill	M	H	L	L	M
East Coast vineyards	H	H	H	M	M
Bicheno Sealife Centre	M	H	L	L	M
East Coast Bird/Animal Park	M	H	L	L	M
Freycinet National Park	H	H	H	H	H
Waubs Bay Harbour Cruise	M	H	L	L	M
Derby Tin Mine	M	H	L	L	M
Route Natural Escape					
Bush Mill	H	M	M	L	M
Richmond precinct	H	H	M	L	M
Devil Park	H	H	H	H	H
Port Arthur HS	H	H	H	H	H
Copping Museum	M	L	L	L	M
Richmond Gaol	H	H	M	L	H
Route Huon Trail					
Forest and Heritage centre	H	H	M	L	M
Hastings Cave/Thermal Pool	H	H	H	L	M
Forest Drives	H	H	H	L	M
Hartz Mtn NP	H	H	H	L	L
Dorans Jam Factory	M	M	H	L	L
Domeneys Fruit and Flower Farm	M	M	H	L	L

H – High Interest M – Moderate Interest L – Low Interest

Key Attractions	Big Tour	Grand Tour	Country Escape	Fly and Stay	Short Tour
Route Wild Way					
Strahan precinct	H	H	L	M	H
Strahan Visitor Centre	M	M	L	M	M
Queenstown precinct	H	H	L	L	H
GLen Clyde House	M	M	L	L	M
Hamilton precinct	M	M	L	L	M
Zeehan Museum	M	M	L	L	M
Gordon River cruises/WHA	H	H	L	H	H
Lake St Clair Visitor Centre	M	M	L	L	M
Mt FieLd NP	M	M	L	L	M
Mt Lyell Mines tour	M	L	L	L	L
Salmon Ponds	M	M	L	L	L
Ship That Never Was	H	H	L	H	H
Lake St Clair cruises	M	M	L	L	L
Devil Jet	L	L	L	L	L
Wild River Jet	L	L	L	M	L
Strahan Sea Planes	H	L	L	M	M
Sheffield precinct/ Murals	H	H	L	L	L
Sarah Island	H	H	L	L	H
Cradle Mtn Visitor Centre	H	H	H	H	H
Cradle Mtn NP	H	H	H	H	H
Teepookana	H	H	L	L	L
Route Red Earth Country					
Rasberry farm	H	H	L	L	L
Stanley precinct	H	H	L	L	M
Don River railway	H	H	L	L	M
The Nut	M	M	L	L	M
Highfield	H	H	L	L	M
Caves – King Solomon etc	M	L	L	L	L
Deloraine art and craft outlets	H	H	L	L	H
Tiagarra	L	L	L	L	L
Route Wine Route					
Tamar wine route	H	M	H	H	M
Grubb Shaft Museum	M	L	L	L	L
Lavender farm	L	L	L	L	L
Low Head Maritime Museum	L	L	L	L	L

H – High Interest M – Moderate Interest L – Low Interest

Key Attractions	Big Tour	Grand Tour	Country Escape	Fly and Stay	Short Tour
DestinationHobart					
Casino	H	H	L	H	H
Antarctic Adventure	L	L	M	M	H
Sullivans Cove/Market	H	H	H	H	H
Battery Point precinct	H	H	H	H	H
Moorilla vineyard	L	L	H	H	L
Cascade tours	M	L	M	M	L
Historic walks	M	M	M	M	L
Botanical gardens	H	H	M	M	L
Bonorong Park	H	H	M	M	M
Scenic Flights WHA	L	L	M	M	M
Mt Wellington	H	H	H	H	H
Derwent River cruises	M	M	L	L	L
Tas Museum	L	L	L	L	L
Maritime Museum	L	L	L	L	L
Runnymede	L	L	L	L	L
Anglesea Barracks	L	L	L	L	L
Cadbury Tour	H	M	L	L	M
Destination Launceston					
Country Club Casino	M	M	H	H	M
Queen Victoria Museum	M	L	L	L	L
Launceston City centre	H	H	H	H	H
Cataract Gorge	H	H	H	H	H
Tamar River cruises	M	L	L	M	L
Penny Royal	M	L	L	L	L

H – High Interest M – Moderate Interest L – Low Interest

Appendix 8

Assessment of Major Attractions by Appeals and Expectations of the `Big Tour' Market Segments

Key Attractions	All				Older Lower								YC's			Older Affluent							Aff Fam			
	Wilderness	Heritage	Food & Wine	Arts & Entertainment	Historical	Crafts & Antiques	Markets	Exhibitions	Walking <2hrs	Casinos	Family History	Cruising	Walking <> 2hrs O/N	Adventure	Outdoor	Crafts & Antiques	Markets	Historic	Museums & Theatre	Walking >2hrs	Boating	Family History	Crafts & Antiques	Historic	Walking <2hrs	Adventure
Route Heritage Highway																										
Ross Wool centre		•		•		•										•								•		
Woolmers		•			•													•							•	
Ross precinct		•	•	•	•	•										•		•						•	•	
Evandale precinct		•	•	•	•	•	•	•									•	•	•					•	•	
Oatlands precinct		•			•	•										•		•						•	•	
Longford precinct		•		•	•	•										•		•						•	•	
Route By the Sea (East Coast)																									•	
East Coast Bark Mill		•			•													•								
East Coast vineyards			•																							
Bicheno Sealife centre																										
East Coast Bird/Animal Park																										
Freycinet National Park	•								•				•		•						•	•				•
Waubs Bay Harbour Cruise												•										•				
Derby Tin Mine		•			•													•							•	
Route Natural Escape																										
Bush Mill		•			•													•							•	
Richmond precinct		•	•	•	•	•										•		•						•	•	
Devil Park																										
Port Arthur HS		•		•	•						•							•					•		•	
Copping Museum		•			•													•							•	
Richmond Gaol		•			•													•							•	

Key Attractions	All			Older Lower									YC's			Older Affluent							Aff Fam			
	Wilderness	Heritage	Food & Wine	Arts & Entertainment	Historical	Crafts & Antiques	Markets	Exhibitions	Walking <2hrs	Casinos	Family History	Cruising	Walking <> 2hrs O/N	Adventure	Outdoor	Crafts & Antiques	Markets	Historic	Museums & Theatre	Walking >2hrs	Boating	Family History	Crafts & Antiques	Historic	Walking <2hrs	Adventure
Route Huon Trail																							•	•	•	
Forest and Heritage centre		•			•	•			•							•		•		•						
Hastings Cave/Thermal Pool	•								•						•											
Forest Drives									•						•					•						
Hartz Mtn NP	•								•						•					•						
Dorans Jam Factory			•																							
Domedeneys Fruit Flower farm			•																							
Route Wild Way																										
Strahan precinct	•	•	•	•	•			•			•		•	•			•		•	•	•			•	•	•
Strahan visitor centre		•			•			•																		
Queenstown precinct		•			•									•						•				•		
Glen Clyde House		•	•		•	•									•		•						•	•		
Hamilton precinct		•			•	•							•		•					•			•	•		
Zeehan Museum		•			•									•	•					•				•		
Gordon River cruises/ WHA	•											•										•				
Lake St Clair visitor centre	•		•						•			•	•		•					•	•				•	
Mt Field NP	•								•				•		•					•					•	
Mt Lyell Mines tour		•			•													•						•		
Salmon Ponds		•			•													•						•		
Ship That Never Was		•		•															•							
Lake St Clair cruises	•											•									•					
Devil jet		•										•		•	•						•					•
Wild River jet														•												•
Strahan Sea Planes	•													•												•
Sheffield precinct/ Murals			•	•																						
Sarah Island	•	•			•							•			•			•			•			•		
Cradle Mtn visitor centre	•																									
Cradle Mtn NP	•	•							•				•		•					•					•	
Teepookana																										
Route Wine Route																										
Tamar wine route			•																				•			
Grubb Shaft Museum		•			•													•	•					•		
Lavender farm																										
Low Head Maritime Museum		•			•													•	•					•		

Key Attractions	All				Older Lower								YC's			Older Affluent							Aff Fam			
	Wilderness	Heritage	Food & Wine	Arts & Entertainment	Historical	Crafts & Antiques	Markets	Exhibitions	Walking <2hrs	Casinos	Family History	Cruising	Walking <> 2hrs O/N	Adventure	Outdoor	Crafts & Antiques	Markets	Historic	Museums & Theatre	Walking >2hrs	Boating	Family History	Crafts & Antiques	Historic	Walking <2hrs	Adventure
Route Red Earth Country																										
Rasberry farm			•																							
Stanley precinct		•	•	•	•	•										•		•					•	•		
Don River railway		•			•													•						•		
The Nut									•				•		•					•						
Highfield		•			•													•						•		
Caves – King Solomon etc	•													•	•											•
Deloraine art and craft outlets				•		•	•	•								•	•						•			
Tiagarra		•			•													•						•		
DestinationHobart																										
Casino			•	•				•		•																
Antartic Adventure		•		•															•							
Sullivans Cove/Market		•	•	•	•	•		•								•	•	•	•				•	•		
Batteryt Point precinct		•	•	•	•	•										•	•	•	•				•	•		
Moorilla vineyard			•					•																		
Cascade tours			•		•													•						•		
Historic walks		•			•													•						•		
Botanical gardens		•			•													•						•		
Bonorong Park																										
Scenic FligHights WHA	•													•												•
Mt Wellington	•								•				•		•										•	
Derwent River cruises												•									•					
Tas Museum		•		•	•			•										•	•					•		
Maritime Museum		•		•														•	•					•		
Runnymede		•			•													•						•		
Anglesea Barracks		•			•													•						•		
Cadbury Tour			•																							
Destination Launceston																										
Country Club Casino			•	•						•																
Queen Victoria Museum		•		•	•			•										•	•					•		
Launceston City centre		•		•	•	•	•	•	•			•				•	•	•	•				•	•		
Cataract Gorge		•		•	•			•	•			•						•						•		
Tamar River cruises												•									•					
Penny Royal				•																						

Appendix 9

Business Case Study

Within the framework of developing the Tasmanian Attractions Study, it was considered essential to gain an insight into how the attractions sector of the tourism industry are faring in economic terms. It was also an opportunity to gain first hand advice as to how key attraction operators viewed the State's opportunity to develop a key attractions study and to provide their valuable input. To do this, a selected number of attractions from around the State were interviewed with the specific intentions of finding out some key indicators of their success, and what their main inhibiting factors might be.

A template was developed which outlined the rationale and outputs for each question.

The eight attractions selected covered wildlife parks, museums and art galleries, gourmet produce outlets, cultural heritage sites and visitor centres.

The following two tables outline the results from a qualitative and quantitative point of view.

Qualitative Results from Attractions Survey

some comments were made more than once – they appear as they were presented.

Product – facilities, staffing, marketing and management

- Had to develop our own training scheme – paucity of relevant material available
- Visiting friends and relatives (VFR) most undervalued segment within Tasmanian Tourism – by far the biggest opportunity
- Quality delivery of product is the key to success
- Interpretation needs updating to always be contemporary
- Workplace agreement was essential
- Marketing and promotion are the keys to continues success
- Yield per customer is critical to long term survival
- High quality emphasis on retail has proven benefits
- Need constant refurbishment to keep standards
- Volunteers very hard to keep and replace
- Lack of resources available to promote cultural heritage
- Professional presentation and service
- Attraction product needs to be more experiential, hands on and engaging
- Critical issues
  – Ability in marketing
  – Delivery of quality experiences
  – Management & professional approach
  – Penetration of the coach market

Location – Proximity to markets, visibility, key routes

- Growing the Tasmanian market is of prime importance
- Regional Promotion essential – cannot do it alone
- Council needs to have a different attitude from "reaping the parking money benefits" to being proactive about paths, access, signs and other visitor amenities
- Garnering local support and referral business is a key element for long term success
- Unfulfilled potential due to location. Signs and other competing routes waylaying visitors prior to arrival

Fit – Concept matches visitor expectations about Tasmania

- Greatest colonial art collection within Australia (Tasmania was the most affluent of all the States before 1850) – need to display it
- Cultural tourism has grown around the world – but not to Tasmania. Only promoting the natural heritage
- Packaging food and wine around the State – are we really a gourmet state? We export it all and difficult to find and source around the Island

- Selling upmarket Tasmanian Produce is a critical success factor but some cellar door sales are more expensive than on supermarket shelves interstate
- Tasmania is in real trouble – cannot buy fresh fish on the East Coast, not doing it well 365 days, upsetting too many visitors – not delivering the Gourmet State image

Question	Outputs
What are the visitor numbers to the attraction?	Size, scale, penetration of the market.
What are the segments?	Establish the importance of the coach market, cruise ship market, local market etc.
How long has the attraction been in business? Are the numbers increasing or decreasing?	Long term viability, trends in certain types of attractions, growth markets.
What is the corporate structure of the entity? Partnership, company, Government – public facility?	Ratio of Public to Private sector attractions within the study group.
How many revenue centres are there?	Find the usual mix of business within an attraction.
What is the average sale of food, merchandise etc as a percentage of the gated price?	Establish how much extra revenues are produced outside of the attraction fee.
What is the debt to equity ratio for the business?	To ascertain if there is an opportunity to expand the business from either equity or debt financing.
From the last tax return, what was the percentage of finance costs to revenues? Finance costs to include leasing, asset purchase, capital repayments, all interest etc.	To establish the business ratios that the private sector attractions are obliged with.
What was the wages percentage to revenues?	To establish the opportunity for growth in employment at the facility.
What was the marketing costs as a percentage of revenues?	To see if there is any scope to increase marketing efforts.
Are there any development plans/ proposals for the attraction? If so, how much capital is involved and how will it be raised?	Judge the confidence within the sector, and the ability of the current attractions to expand.
Are there any inhibiting factors on the ability of this attraction to grow? Council planning, services, markets, access to capital, staff.	Qualitative assessment of the attraction operation and inhibiting factors.
What are the key elements of the continual success and future expansion of this attraction?	Assessment of growth potential and development strategies required to maximise opportunities.

Attractions Strategy – Business Case Results				
Participant No	**Visitor Numbers**	**Segments**	**How old?**	**Corporate Structure**
6	25000	70% self drive 20% Coach 5% Tas	7 Years	Non Profit Association
4	202000	Coach 20% Vic 23% NSW 21% O/S 12% Tas 6%	11 Years	GBE
1	250000	All but quantities unknown	6	Private Co.
5	14000	No coaches Mainly socially aware and visible achievers	6	Private/Gov. Premises leased
2	17000	20% Tas 17% Vic 20% NSW	27	Council Committee
3	140000	33% Locals 33% Other Tas 33% Others	100	Council
7	100000	60% Visitors 40% Tas	7	Private Company
10	17000	9% Tas 81% Other	4	Trust

No. Rev Centre	% Retail & Merch to Gate	Gearing	Wages %	Marketing %	Development Capital
3	Gate 17% Merch 83%	Nil	23%	6.25	Grants
5	Food & Merch are 34% of gate	Nil	48%	3.5%	Borrowings & Grants
3	Private	Little	Private	Private	Equity
3	Gate 15% of income retail 40%	Little	33%	4.7%	Grant
2	Gate 80%	N/A	51%	29%	Grant
4	No gate fees	Nil	N/A	N/A	Grant
1	N/A	N/A	12.6%	3%	Borrowings
4	Gate 38% 62% Others	7.6%	58%	14%	Grant

Conclusions

Although this was a very small sample some interesting conclusions can be reached.

Financial viability

There were no attractions with less than 50,000 visitors per annum that were making sustainable profits. With less than 50,000 visitors, there is an inability to re-invest in the venture, upgrade the skills of the staff and gain the critical mass to run efficiently.

Where the staffing costs were above 30% there was difficulty in making budgeted returns.

Most successful operations found that their profits were generated not from gate sales alone, but from a mixture of revenue centres including the gate, merchandise and food. It could be concluded that a range of visitor facilities and amenities are required before an attraction can gain the critical mass to achieve satisfactory financial results.

Attendances

Those attractions that are successful in attracting the local Tasmanian population are significantly better off financially than those who don't. It seems that the VFR market is much influenced by their Tasmanian hosts and such support is a key to the success of most ventures.

Proximity to Markets

The attractions within the urban reach of Hobart within a day have a much higher visitation than do others. This is quite a logical conclusion but emphasizes the importance of the proximity to the major markets. This reinforces the top of mind awareness for the VFR markets, and also opens up specific market opportunities such as Cruise Ships.

Types of Attractions

"Mammal wildlife" and "gourmet produce" were very successful themes for attractions surveyed, whereas interpretive centres and heritage sites seemed to struggle.

It would appear that one strategy that may assist in this is to thread various experiences together (across all types and segments) to gain a critical mass and provide a wider/richer visitor experience.

One example of what might be achieved is the future redevelopment of Queen Victoria Museum's Invaresk Railway Site. It is anticipated that there will be a world class art gallery, restaurants/cafe within this arts and cultural precinct. This could be linked by a pedestrian access along the water's edge to the Gorge to enable Australia's best urban Park to be linked with one of the best galleries and heritage sites in the State. Along the way is the Customs House and other heritage buildings providing the catalyst to develop the whole river frontage of Launceston to provide the visitor with a full day of experiences.

There are other definitions within the "type" of attractions. Some are passive, some have a retail focus on our gourmet produce whilst others could be described as quite active.

Any single attraction must be able to attract a wide variety of consumers and have different levels of activities for them to satisfy their expectations.

There are some heritage sites that are really quite boring to some visitors whilst appear fascinating to others. There needs to be a different program of interpretation for say a Coach Group than two backpackers to keep them both satisfied at the same attraction – but some heritage attractions have just one "menu" for all.

Also, there is a certain need for visitors to buy things as memories of their holidays. For example wine is bought at Cellar Doors around Australia. When the customer opens it much later at home, they remember the experience, the location, the people and the weather when they bought that particular bottle. Some attractions do not give credence to the importance of merchandise for both an experience for the visitor, and a profitable and important element of their business.

Public / Private Sector ratio of Attractions

There is a considerable amount of public sector finance or management involvement in the tourism operations within Tasmania. This includes all three levels of government – Federal, State and Local.

For example, this list demonstrates how the high profile attractions around the State have public monies involved:

Port Arthur, the National Trust properties, Tasmanian Museum and the Queen Victoria Museum, Strahan Wharf Visitor Centre, Forestry visitor facilities, Geeveston Forest and Heritage Centre, Highfield, the new visitor centres at Freycinet and Deloraine, the ABT Railway.

The key icons of the natural heritage visitor experience of Tasmania are also either regulated, managed or licensed by Parks and Wildlife Service – Gordon River Cruises, Cradle Mountain, Lake St Clair and Freycinet.

Implications

This means that there are two issues involved

- Access to further capital
- Government's role in future tourism activities

Access to Capital

In the case of the surveyed attractions for the development of this strategy, 6 out of 8 stated that their development plans were reliant on grants in some form or another.

While there is such a tight budgetary situation in Tasmania, these operations are unlikely to be able to develop much further. This will have a deleterious effect on the State's ability to deliver quality visitor experiences.

Some research into the retail bank's view of tourism attractions indicates attractions are considered a high risk lending area and would need significant collateral to make them attractive. Even tourism generally is not viewed as being without risk, but the accommodation sector is viewed more positively than the attractions sector.

Often, the attraction has no alternative uses and it is not considered to be sufficient security. Therefore extra first mortgage property is required.

It may be easier to borrow larger sums from the banking world than smaller sums. A well detailed business plan and market analysis that needs to accompany a loan application for $500,000 has a better chance of success than does a smaller operation that may be needing only a third of that. In some cases it is easier to get personal finance for a yacht than a business loan for a $100,000 tourism attraction.

There are of course other venture capital funds around Australia, some listed others not – but within the small Tasmanian market context they are not really operational here.

Future Tourism Activities

The main development of tourism within the last 15 years in Tasmania has been based on the World Heritage Area and the National Parks.

Although the Gordon River Cruise has been an important element within the Tasmanian tourism scene for many years, the huge boost to nature based tourism came with the redevelopment of the Cradle Mountain Lodge – formerly the Pencil Pine Inn.

A private developer bought the property in 1983, and started to generate great publicity about the potential the area had to many journalists. This developer knew that there were to be significant government funds spent on infrastructure within the area in the following years flowing from the Dam Compensation Fund. This meant better roads, reticulated electricity supply and communications. The number of accommodation units grew from 4 to 35 in two years and went to 70 in 5 years. It is now owned by a multi national company has over 100 units and the area has a campground, bunkhouses and many other accommodation developments.

At Freycinet, it was only after the State Government spent a lot of money on the road to Coles Bay that the development of the accommodation industry started to grow at Freycinet. The redevelopment of the Chateau to become the Freycinet Lodge was the catalyst to this area, becoming the second major nature based icon apart from Cradle.

At Strahan the Parks and Wildlife Service needed to manage the licenses on the Gordon River to allow some competition as well as the access to Sarah Island, before the growth in investment was possible. The Gordon River has now three multi million dollar vessels operatinfg as well as a fleet of small sea planes. In fact, there is now more capital flowing into Strahan than in any other destination within Tasmania.

In the immediate future, it is probable that there will be new developments at Cradle Mountain on land released by the State Government, developments at Pumphouse Point on land leased by the State Government and there is a site under investigation at Coles Bay – also Crown Land. The ABT railway is runs along a significant amount of Crown Land vested in different agencies. The Springs site on Mt Wellington, targetted for tourism accommodation development is managed by the Wellington Trust – a public body.

The government in one from or another is therefore the major player in tourism development for Tasmania – whether it chooses to be or not.

The Government needs to recognise that not only will it need to shape the future development of the industry by its agencies policies and its strategic land releases, but also by its future capital funding to its existing operations that it either owns or funds in certain ways.

Appendix 10

Results from Events Workshop

Salamanca Inn – 8.3.99

What are visitors looking for when attending a Tasmanian Event?

Entertainment

Engagement

Fun

Get close to the action

Separate values for participants than spectators

Education = skills base

Business driven

Social aspects – meeting places

Should the trade and visitors be separated in some publications?

Value for money

Do we value events because of how many people attended that event, or did the event add value / enrich the visitor experience?

Are we losing the idea that the main attribute to hold an event in Tasmania is the lack of population? So that people can actually participate? People can do and see more here.

The public attitude to events is dreadful – how about the locals getting upset about the wharf being closed for the Wooden Boats Festival? And the resentment of 1500 cyclists up the East Coast.

Have to have the locals behind you for real success.

What do we do well?

- Good family value
- Great abilities to fix things and organise
- Large volunteer base – 2500 run Targa
- Lots of smaller events doing well
- Friendly atmosphere during events
- Potential to promote the quiet achievers within the events calendar
- Small population, relaxed environment – provides great accessibility for spectators and participants – whereas in Sydney teams are hours away from the venues.

What are the Key Success Factors?

- Finance to promote, manage and market
- Good product to start with
- Passionate people with lots of endeavour to make things happen
- Stability within committees – but with new ideas and people coming through
- Vibrancy and new dimensions every year
- Taking an image, using a theme and positioning
- All new events need champions to make them happen
- Interventionist policies to make things work – Tall Ships

What are the Inhibiting Factors?

- Timing – too many things not co-ordinated
- Knowledge by the travel distribution chain
- Not knowing the full potential of the event
- Weather
- Linkages between events
- Government changing public holidays
- Should events be spread over a full year or concentrated over a few months
- Need to provide incentive funding for some events
- Centralised body required to co-ordinate activities
- Charge too little – it is impossible to see five gardens and have lunch for $10
- Charity mentality
- Quality products will command high prices – swim meet best tickets sold for $60 rather than the suggested $20
- Yield management is also valuable to attractions organisers

What are the Hallmark Opportunities?

Major Festival of the Arts

Deloraine Craft Fair

Hobart Summer Festival

Sydney to Hobart

Launceston Cup, Pipers concert etc

Agfest

National Sporting Events

Australian Wooden Boat Festival

Gems

Piners Festival

Spin in at Bothwell

Penny Farthing at Evandale

Taste of the Huon

Coal River Wine Tour

Open Garden Scheme

Season of Romance

Derby River Derby

Jazz Festival

Sheep Dog Trials

Heritage Festival

Three Peaks Race

Festivale

Cradle to Coast – Adventure stuff

Numerous sport – Devonport triathlon

Events should be sustainable

What about performances – Les Mis?

Blooming Tasmania – who takes responsibility for them when they get to a certain size that is greater than the responsibilities for the regional gateways? When they become interstate not intrastate?

What can we do?

- Use the conventions subsidy to provide an incentive for winter clubs and associations to visit events in Tasmania
- Govt to provide marketing support for 12 months for gestating events
- Look at whose costs are responsible for marketing events interstate
- Package events and get wholesalers involved
- Also get the other elements of the industry involved – accommodation / transport
- Mainland travel centres not properly committed and involved with events
- Agfest cannot grow within Tasmania – who gets up to promote it from here?
- Draw events together to plan more effectively, provide advice and regional advertising as an intrastate holiday planner
- Need to get the message to the arrival points about the range and size of events
- Let the Agfest put leaflets into the holiday pouches and planners
- Use the PR expertise of Tourism Tasmania
- Need to amalgamate the small budgets from a number of events to market effectively interstate
- Maritime Heritage has huge potential for events
- Gems need three year lead time before they are sustainable
- Get wholesalers to not necessarily package but to use events to produce a reason to visit – use them as triggers
- Focus on profits and commercial involvement.

Results of the Nature Based Workshop

Salamanca Inn 8.3.99

What are visitors looking for?

- Something they cannot experience at home
- Lack of crowds – anonymity
- Natural State things
- Saying this place is boring is a strength not a weakness
- Calm, personalised experiences
- Revitalizing and rejuvenation

- Looking for scientific and historical information and feedback
- To see things easily without crowds – especially wildlife
- Personal attention, good guides
- Safe adventure within a cocoon
- Excellent personal experiences
- Clean, safe, English speaking, unaffected, stable – to be introduced to our environment cultural and natural with quality experiences
- Additional personalised presentation add value – but they have to be good
- Can we double the time rather than double the numbers?
- The State facilities are a credit to the Parks services

What are the current problems?

- Language – Parks passes do not include Wildlife Parks
- Often send people off to do too much themselves
- If you go to a cave you get a tour, go to a NP and you do it yourself
- Local Govt can play a great role in information delivery – like the Summer Ranger program
- We lack confidence in managing tourism as an internationally great world class experience for international travellers – we can turn very common everyday experiences into internationally desirable "special experiences"
- Why promote $200 DIY Overland experience rather than Cradle Huts at $2000
- US visitors can spend $5000 per week but cannot in Tasmania.
- No limit to high value – the limitation is in the marketing sphere of experience
- Different levels of interaction for the same experience – like the Great Barrier Reef – snorkel – dive, helicopters, boats
- Attractions are designed for high numbers but there is no coordination between operators
- Do the gateways really give the friendly service that we are renowned for?
- We do not get high yield because we do not provide high value interpretation
- Nature is easy to see and access at Strahan but is invisible is Hobart – which should be the Nature Capital City of the world
- We must attract people all through the year not just the peak seasons
- How do we transfer those people that spend so much on skiing to come here in winter?
- There is a lack of good information in the core markets of things to do – only lists
- NZ make it so easy to buy the wild product
- Scenic images are terrific, but there are no guides hopping about showing visitors in the images – they are always people in "wonderment" by themselves
- We underestimate and undervalue and therefore undersell
- Airline images are Sun, Cities, Bangkok etc
- Nothing wrong with the product – except it is too cheap – just a marketing problem
- US now knows of Tasmanian angling, they spend $1000 per day – why can't they get to know about riding and diving in the same manner?
- Intense personalised interpretation is worth $1000 per day US
- We need to develop a branding around this type of image
- Port Arthur and Cradle are all low yield images – no returns
- Clean air is a reducing commodity – develop a health focus
- Develop a harder merchandising focus in Parks shops

- Day Rafting needs building – but devils devils and devils are the main chance
- Product development – Can Parks act as a catalyst to trial products and then let them out to the private sector
- Angling needed start up capital investment for international marketing and is now well branded and self sufficient
- How do we improve guiding and interpretation levels?
- Are the high priced opportunities featured within the VJP program, Agents' famils and wholesalers?

What are the Development opportunities?

- Dive Centre and a submersible to exhibit the giant kelp forests
- Central Plateau Lodge – combined trout and riding lodge
- Underwater observatory – night time focus at Low Head
- Reserche Bay – Campervan and Camp Park, interpretation of whaling, fishing and mining through the Ida Bay Railway from the Caves to the deep hole
- Springs – the best nature based opportunity in Tasmania
- Must add value
- Quicksilver to reef – $140
- Kangaroo Island – $190
- Skyrail – $40
- Alice Springs walking – $80
- African National Parks – $900 includes accommodation
- Always set it up where you know it will work
- The best wildlife is on private land
- Most wildlife lives off farms and is therefore artificially fed anyway
- African style standing camp at Bakers Beach and Mt William and West Coast – South of Marrawah
- Extreme sports
- Skate boards down Mt Wellington
- Tahune Lodge – confluence of the Huon and Picton Rivers
- 50/60 berth cruise ship for Port Davey – and also Macquarie Island
- Lets find out what they want rather than dream these things up
- A cross promotion opportunity when all the visitor centres are completed
- Pull the plug on Lake Pedder and publicise the international remedial program
- 1, market research, 2 link places within packages, 3 market the combined things to do, 4 ensure the product is built on and further developed
- Aspects of our environment are world class. What can we do to maximize the revenues?
- Don't try to find out what Germans want to do in Tasmania – they don't know where or what it is. Develop the product and then offer it to them
- Perennial problem of airline access
- Use famous people from other countries to make the TV shows and documentaries for screening in their home areas
- ICONS – Kakadu – find out what will inspire our visitors to a must see must do first preference Tasmania – not other wild destinations.

Attractions Workshop – Cultural Heritage

Why do they come?

History

- Convicts
- Early settlements
- Personal anecdotes – the people story
- Special about Tasmania

Houses

- Parks, National Trust, Woolmers, Private
- Maybe too many – same experience

To Learn

- Love tokens and tattoos
- Museums – to touch things
- Interpretation is the greatest thing
- Bringing history alive
- TV/entertainment = whiz things
- Authenticity – make it live like Sovereign Hill

Contact with People – come across linkages, meeting local identities

- Connecting with people
- People talk to us the operators
- Individual attention – see the curator – intimate
- Thylacines and devils – peculiar to Tasmania
- Tasmania does have things for the future – new interpretation, innovative ways of expressing our past. Quite an opportunity.
- Combination of attractions – cross fertilizing, like new design/mixture in old homes
- Marry together arts and crafts
- Complementing exhibitions

Because of the water – Bass Strait – they look for different "specialness"

- Gardens are potentially great – 95% are coming to do the tour
- Vineyards/food/fresh
- To experience and live in the history – colonial accommodation
- Want to experience all the bits – there are so many to chose from
- Recharge the batteries

What are the Key Attractions

- Hobart and maritime history
- Shipwrecks – Tasman Peninsula – world class kelp bed, diving
- Australian colonial history + Woolmers and Port Arthur
- Swansea Bark Mill and Highfield
- Sydney – Hobart
- String stories together – concept touring –
- There is NO key big world class attraction
- Best touring available in Australia because it links constantly – threads together.

People are wanting to do more in less time – concentration of activity – (Richard Davey) – just don't let people wonder and wander.

The future opportunity is "Enabling" – stringing things together, genuine packaging = ABT, Queenstown, Bird River Walk, Pillinger, cruise Sarah Island, dinner and home. A full day itinerary.

Working together – Current lack of cooperation and trust

- Infrastructure – like accommodation must be together
- Convict database – opportunity, CD/Internet
- Too many people are left to wander
- Raise status for arts – a cultural precinct, international gallery, fantastic archival collections but always displayed, underutilized historic properties, connection with sculpture gardens– artists residences – getting things
- Poor opening hours – artists and crafts people. Link several precincts
- F & W – often cheaper on the Mainland; rival food is questionable; average tea rooms with poor coffee
- Tourism Culture = service = not open for business
- Winter trading – 'nice to see you're open – no one else is'
- Nothing for kids to do

Intrastate market and families

- We could double our business from that

Things could develop better if given more marketing assistance – a market support unit

- Getting them together
- Develop Colonial Brickendon, Woolmers as a key centre of real life and Longford
- Needs packaging with other things

Need icons of gardens – National Rose Garden of Australia (12 acres at Woolmers)

Maritime State.

- Incat, fishing industry, aquaculture, Bicheno Aboriginal maritime heritage, real fishing experience
- National recreation boating opportunity
- Tall ships, Opera on the Ocean, Wooden Boat Festival, casual boating, tuna fishing – Maritime Place – the Hub
- For each theme – it needs a focus
- Attractions pass – themes
- Raw diverse product – but interpretation and information
- Market mainline rail now possible

Key ideas – Market and promote, whole gammut

- Interpretation and signage
- Pooling and network – teamwork
- Breathe life into what we have
- Packaging into passes
- Training – sales/service

Market support for incidental organisations

- Professional help and assistance
- Iconic architectural building around, like Guggenheimer/Getty at Salamanca, focus on arts and culture – International status and pull
- best toilets in the world are in Tasmania
- Derwent Valley railway
- Being drowned by paper – need booklet to consolidate marketing effort

Establish task force – over 5 years, critiquing everything

- Produce a guide 'Bible'– build up marketing strategies – fad ideas, create links – this is what you've got – how do you improve it?
- A Michelin attraction guide – Government pay, industry do it
- Independent, non government – at the service of the industry, but has authority
- Needs criticism – no critical framework within which to operate
- Nothings puts our operators into a level of expectation – a quality framework – not just minimum standards but a proper review process
- Have to lift our game, by setting standards, cannot expect the Government to do it
- Phone line for consumers to comment

Appendix 11

Glossary of Terms

AT	Arts Tasmania
BDA	Brian Dermott & Associates Marketing Planning
DSD	Department of State Development
FT	Forestry Tasmania
HCC	Hobart City Council
HPC	Hobart Ports Corporation Pty Ltd
HTS	Holiday Tracking Study – a nationwide survey conducted weekly by Roy Morgan Research
LCC	Launceston City Council
MICE	Meetings, Incentives, Conference & Exhibitions Sector
PWS	Parks & Wildlife Service
RHYC	Royal Hobart Yacht Club
RTA	Regional Tourism Associations
T21	Tourism 21 Update:Strategic Business Plan for Tourism 1999-2001
TCA	Tourism Council of Australia (Tasmania Branch)
TT	Tourism Tasmania
TVIN	Tasmanian Visitor Information Network
TVIS	Tasmanian Visitor Information System
TVS	Tasmanian Visitor Survey
VFR	People travelling for the main purpose of visiting friends & relatives
WHA	World Heritage Area

Appendix 12

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