

## Executive summary

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The Willow Court Asylum Precinct is a landmark site in the history of psychiatric medicine in Australia. It is also important for its association with the story of convict transportation. It provided shelter and care for the displaced, the deranged and those who were generally regarded as ‘different’ for over 170 years. Inevitably, Willow Court has had a profound impact on the physical and emotional landscape of New Norfolk.

The Willow Court visitor experience has been developed through the adaptive re-use of selected spaces within the Precinct - The Barracks, Bronte, ‘C’ ward and the Therapy Building, as well as the exercise yards. It has been designed as a sensitive, imaginative and personal exploration of the human condition.

The visitor experience focuses on two key components:

- an innovative and vibrant art gallery exhibiting various elements of psychiatric art; and
- an interpretative journey (tour) through the Precinct.

The success of Willow Court as a dynamic and sustainable cultural attraction is heavily dependent on several external factors:

- a critical mass of attractions in New Norfolk
- the strength of regional visitation
- the capacity to take a lead role in developing strategic and cohesive partnerships with appropriate businesses throughout the Derwent Valley.

Willow Court is unlikely to become a ‘stand-alone’ product in the foreseeable future – ie. an attraction in its own right that does not rely on other local drawcards to boost visitation.

The Tasmanian tourism industry is at best, leveling off after five years of unprecedented visitor numbers; the current situation analysis suggests that the future of Willow Court is less related to market growth, and more about market share. New Norfolk is already capturing a larger percentage of visitors across the major ‘cultural’ activities. This suggests there is a solid base on which to build Willow Court’s key appeal.

While anecdotal information suggests that Willow Court is also of potential interest to an education market, that view requires further, objective testing. The following Marketing Plan focuses on the tourism market, as the attraction’s most critical determinant.

The Plan is supported by qualitative research (see Appendix) and the Business Case included from pp.18 – 22.

The Marketing Plan has been designed to meet the key stakeholder objective:

**To develop a sustainable and vibrant visitor experience in the Barracks and Bronte precinct of the Willow Court site.**

It has identified nine goals to support that objective:

- Establish price points that generate sales and profit
- Maximise product purchasing opportunities
- Effectively introduce the Willow Court experience to the market place
- Build local support and awareness with new New Norfolk residents, businesses and other stakeholders
- Position Willow Court as an engaging experience for the broader Tasmanian community and the VFR market
- Position Willow Court as a unique and memorable experience for Tasmania's most profitable interstate and international markets
- Underpin the Willow Court experience with an internal culture and values system that reflects the brand
- Establish efficient and user-friendly processes and procedures
- Ensure that all 'external' components support a quality Willow Court experience.

These goals are in turn, linked to two major, measurable outcomes:

- to meet the business targets identified in the Business Case; and
- to generate an increase in overnight stays in New Norfolk and the Derwent Valley region.

The Marketing Plan presents a strategic, practical and achievable framework. Its life cycle is linked to the Business Case and limited to a period of three years – ie. break-even point. In the interim however, it should be viewed as a living document, subject to regular performance measurement and review. The Plan will enable all stakeholders to embrace agreed, common goals and work towards a memorable and rewarding visitor experience, increased visitor spend and ultimately a well conserved and highly valued cultural precinct.

## Context

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Willow Court 'is significant, historically, as the first custom-built lunatic asylum in the Australian Colonies. Through its use as an asylum for some 170 years and its relative intactness, the Precinct illustrates characteristics of nineteenth and twentieth century asylum design, as well as the evolution of philosophies for treating the insane..., changes in Tasmania's health system and attitudes towards mental illness...'

Australian Heritage Council Statement of Significance

It is within this context that the former Willow Court hospital complex, incorporating the Barracks and Bronte precinct, is being developed as a unique and fascinating visitor experience.

The central concept, 'Art Behind the Wall' acknowledges the pioneering art therapy at Willow Court introduced by eminent psychiatrist, Eric Cunningham Dax, whose collection of psychiatric art includes approximately 10,000 examples of paper, paintings, ceramics and textiles created by people with a mental illness or psychological trauma. The Barracks has been converted into a vibrant exhibition space which will include examples from the Cunningham Dax collection, 'Outsider Art' sourced from other galleries, artistic expression relevant to Willow Court and artistic outcomes generated through an associated artist-in-residence programme.

‘Art Behind the Wall’ can be an experience in its own right, but importantly, it is also an introduction to some broader themes relating to Willow Court and ‘life behind the wall’.

Visitors are also invited to participate in an interpretative journey through the Barracks, ‘C’ Ward, the exercise yards and the Therapy Building, exploring the fine line that separates normal and abnormal, sane and insane, freedom and incarceration.

The following visitor experience statement developed as part of the planning process, provides a holistic expression of the product offering:

‘The Willow Court visitor experience is an imaginative and personal exploration of life behind the wall of a psychiatric institution – and the wall we build between what is normal and what is not.

The visitor experience includes peaceful grounds and gardens, opportunities for reflection and for expressing a response to the site and its interpretation, and the chance to socialise and relax in an on-site café and retail area.

It is at times uplifting and at others, provocative; with visitors choosing for themselves the means and the level at which they engage with it. While the range of layers includes the site’s place in history as one of the first mental asylums in Australia and the way it represents changing views and treatment of mental illness, this experience is essentially an intimate experience of people – those who lived at Willow Court as patients, the staff who worked there, families and community, and the views, response and stories of those who visit, some of whom will have personal connections to the site’.

## **Situation analysis**

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### **The Tasmanian Tourism Climate**

- The Tasmanian tourism industry has continued to host an increasing number of visitors to the State:
  - 820,600 visitors in 2005, growth of 4% on 2004
  - 385,000 were Holiday Visitors, down 1% on 2004
  - domestic arrivals are still dominated by Victoria and New South Wales, followed by Queensland
  - 112,300 International arrivals – up 10% on 2004 with the United Kingdom providing 27% of all inbound visitors.
  
- These statistics should be viewed within the context of several other important factors:
  - average holiday length of stay down from 9.4 nights to 8.7 nights
  - average holiday visitor spend per night up from \$210.00 to \$222.00
  - average holiday visitor spend per trip down from \$1967.00 to \$1942.00
  - holiday touring market (4+ nights) is down 2%, but remains the dominant market with 301,600 visitors
  - holiday short break market (1-3 nights) is down 4% to 80,300 visitors.<sup>1</sup>
  
- There are several significant issues currently impacting on the Tasmanian tourism industry:
  - reduced/low cost air fares
  - shorter holidays
  - increased VFR (Visiting Friends and Relatives) market.

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<sup>1</sup> Tourism Tasmania, Tasmanian Visitor Survey 2005

These are resulting in a changing visitor mix, and a decreasing yield across all sectors. While these changes offer different opportunities, their potential impact on Willow Court must be considered.

### **The National Tourism Climate**

- Tasmania is reflecting broader trends. At a national level, various social and economic factors have seen the overnight leisure market in decline for several years. These include:
  - low cost air fares and massive promotional campaigns for targeted destinations
  - visitors taking shorter length holidays
  - increasing share of leisure travel taken as VFR, rather than holiday travel
  - the strong Australian dollar fuelling outbound travel
  - rising fuel costs turning travelers away from car travel
  - competing products for the Australian consumer's discretionary spend.<sup>2</sup>

### **Market Overview**

- Tasmania has out-performed the rest of Australia in the last five years; however national trends are now beginning to affect travel patterns across the State, with a greater visitor emphasis in and around the major gateways of Hobart and Launceston. Change offers other opportunities that will require careful management.
- The Tasmanian market is predicted to slow over the next five years.
- According to research commissioned by Tourism Tasmania, the State has already lost its competitive preference, although there are some signs that this trend may be leveling off.<sup>3</sup>
- Some regional areas are experiencing challenges in attracting stronger visitation, although Brian Dermott and Associates (BDA) research suggests that they are doing better than many of their regional counterparts on the mainland.
- Both nationally and locally, the VFR market is defying other, broader trends, with Tasmania experiencing an increase of 17% to 216,200 arrivals.<sup>4</sup>
- Repeat visitation is also showing some further improvement with more visitors returning to Tasmania, albeit for fewer nights; 62% are spending at least \$200.00 per person, per night, up from 44% in 2001.<sup>5</sup>
- In the broader context however, the redevelopment of Willow Court will occur at a time when the Tasmanian tourism industry has peaked; the need for an attraction with strong market appeal will be critical as the industry moves out of an access-led phase to one that relies on the quality of our product offerings.

### **'The Rivers Run' Visitor Profile**

#### **Visitation**

- For the purposes of the TVS, visitor numbers to 'The Rivers Run' are derived from those visiting one or more of the following destinations:
  - New Norfolk, Bothwell, Russell Falls, Mt. Field National Park, Lake Pedder, Gordon Dam, Lake St. Clair, Derwent Bridge.
- The Derwent Valley region has shared in the tourism industry's growth with visitation up from 142,600 in 2001 to 237,800 in 2005 – an impressive

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<sup>2</sup> Trends, Performance, Forecasts p.6

<sup>3</sup> Brian Dermott & Associates (BDA) Quarterly Tracker 4/06 (draft)

<sup>4</sup> TVS 2005

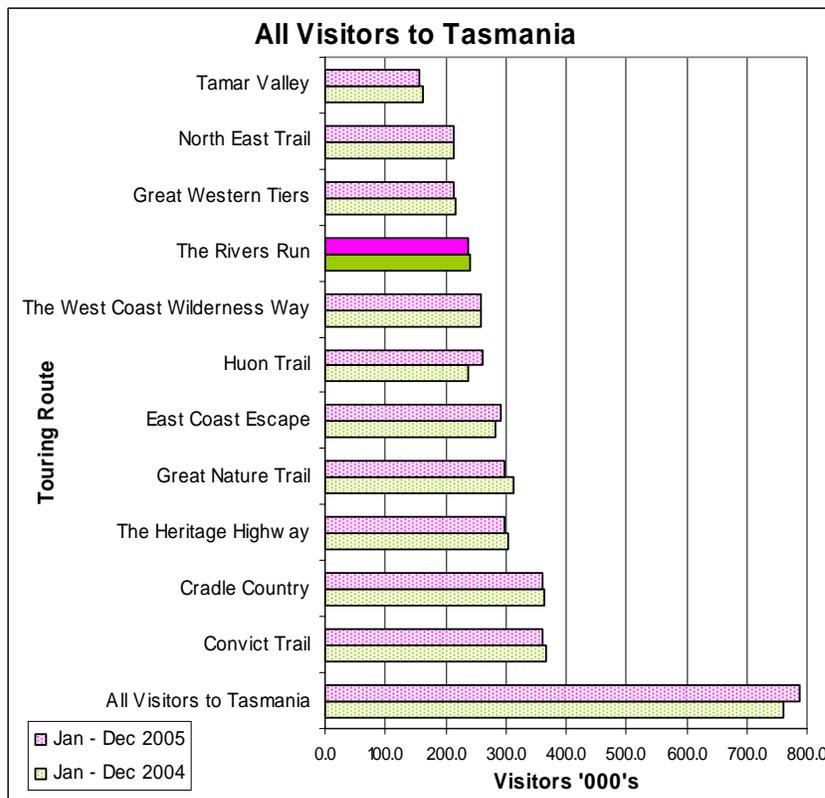
<sup>5</sup> BDA Market Planning 6/06

increase of almost 60 per cent. Holiday visitation decreased slightly in 2005, from 188,900 to 187,400.

- Of the 112,300 international visitors to the State in the year ending December 05, 44% or 49,412 indicated that they had been to one or more destinations within ‘The Rivers Run’.
- The area benefits from the iconic attraction, Mt. Field National Park, which attracted more than 83,000 visitors in 2005, as well as being part of the major touring route between Hobart and ultimately, Strahan.
- According to the TVS to the year ending December 2005:
  - 49% of all holiday visitors to Tasmania visited ‘The Rivers Run’
  - 58% of all holiday visitors to ‘The Rivers Run’ were first time visitors to Tasmania, a slight increase on 2004
  - 41% of all holiday visitors to ‘The Rivers Run’ were repeat holiday visitors to Tasmania, a slight decrease on 2004.

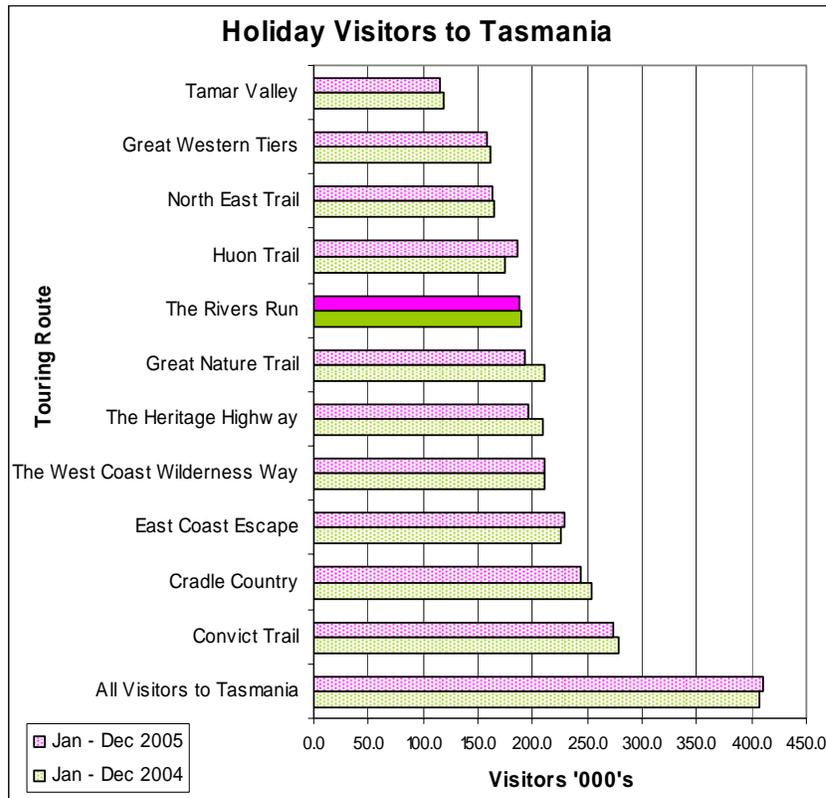
**Graph 1** illustrates total visitation to ‘The Rivers Run’ touring route. It includes comparative numbers for the touring route between 2004 and 2005 as well as an overall comparison with total visitation to other Tasmanian touring routes.

**Graph 2** relates to holiday visitors. In both instances, ‘The Rivers Run’ is outperformed by a significant number of other touring routes.



**Graph 1**

Tasmanian Visitor Survey 2005



Graph 2

Tasmanian Visitor Survey 2005

**Demographics**

- 47% of holiday visitors who traveled ‘The Rivers Run’ were aged between 45 and 64
- Occupational status reflected the overall Tasmanian response with ‘professionals’ making up 37%, followed by small business owners (10%) and office workers (9%).

**Gateways**

- Hobart airport is the major departure point for all holiday visitors to the region, accounting for 47%
- Thirty four per cent depart via the TT line in Devonport
- Thirty six per cent stayed in Hobart on their first night in Tasmania
- Thirty five per cent stayed in Hobart on their last night.

NB: While the market analysis focuses on the majority who travel by air, 18% of visitors to Tasmania arrive by Spirits 1/11. Detailed research regarding these visitors is not available through the Tasmanian Visitor Survey, but it is known that they stay longer and travel further than the Short Tour and Short Break segments.

**New Norfolk Visitor Profile**

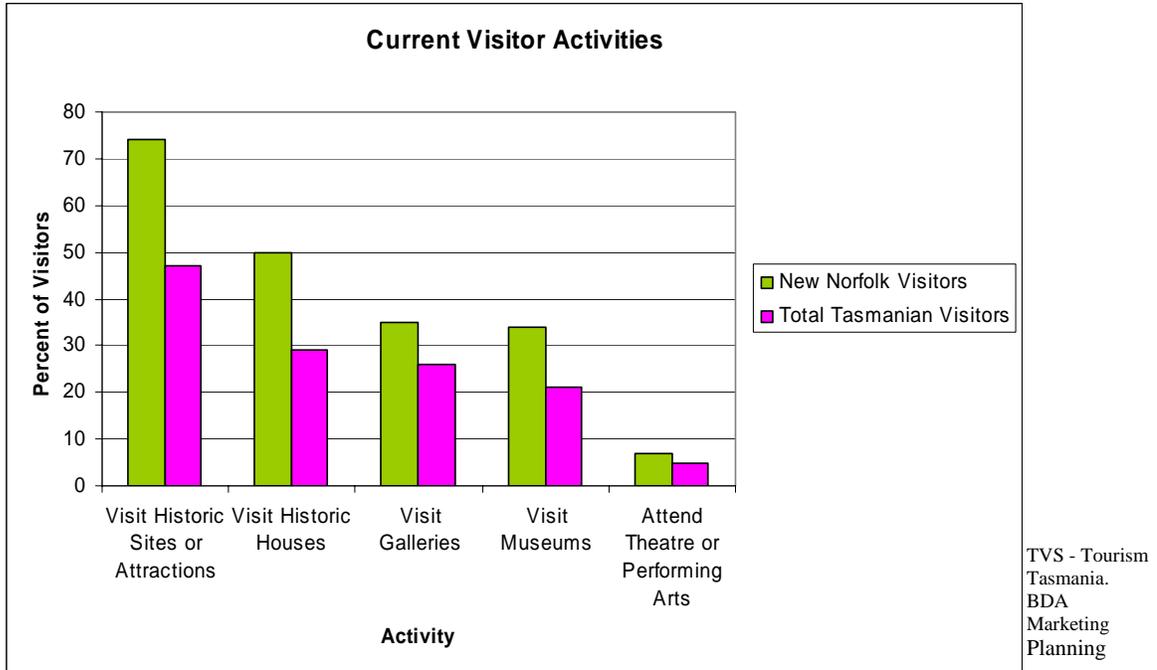
**Visitation**

- The TVS shows that in the year ending December 2005:
  - 80,644 people passed through New Norfolk
  - 64,824 stopped in New Norfolk
  - 19,955 people stayed the night in New Norfolk
  - This is a total of 165,423 visitors to New Norfolk.

### Current Visitor Activities

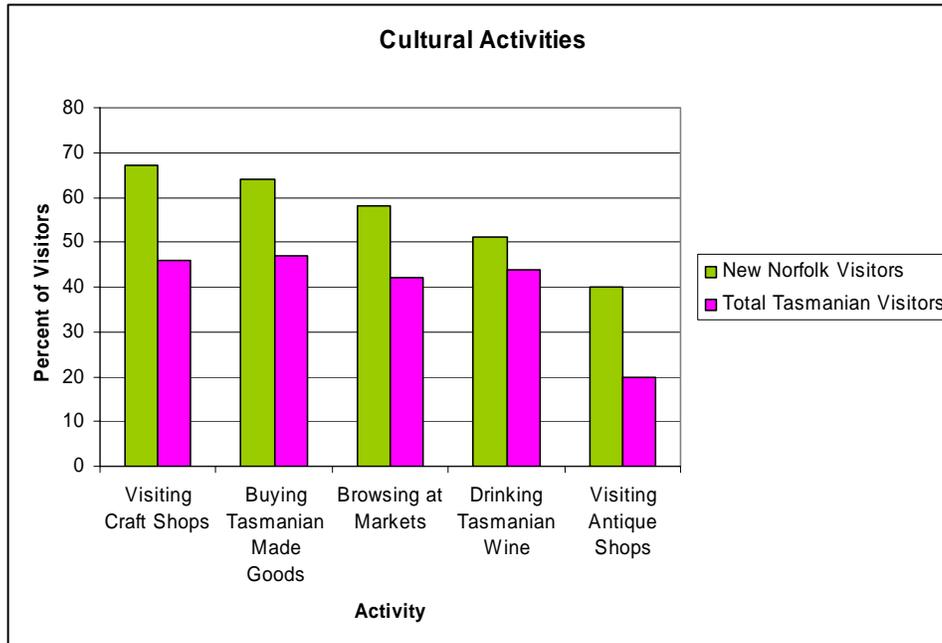
The development of Willow Court will connect with Tasmania's brand including our 'rich living history'.

- New Norfolk is already capturing a larger percentage of visitors across the major 'cultural' activities. This suggests there is a solid base on which to build Willow Court's key appeal. The graph below illustrates current visitor activities.



- Visitors to New Norfolk are also more likely to engage in a range of what may be loosely considered other 'cultural' activities, including visiting craft shops, browsing markets, drinking Tasmanian wine and buying Tasmanian made goods.

*Caution should be exercised in the interpretation of this type of data as these preferences may be viewed as a logical response to existing product availability.*



The graph above illustrates the other cultural experiences where current visitors to New Norfolk are higher than the average visitor to Tasmania.

- The importance of cultural activities however should not be taken out of context. Research shows that a very low percentage of holiday visitors come to Tasmania for one particular type of experience, but rather, choose a combination of activities based on our natural and cultural assets, and our reputation for fine food and wine. These patterns should be acknowledged through the appropriate packaging of Willow Court with other more diverse experiences in the region.

### Regional Trends

- Visitation to the Derwent Valley region is holding, with only slight decreases in 2005. Yield, however has dropped by 15%.
- There is significant opportunity to convert the high number of travelers who passed through New Norfolk, but didn't stop, or who stopped, but didn't stay overnight.
- The opening of the Maydena Hauler in 2007 will provide an iconic experience which is expected to draw increasing numbers through the region.
- There is good synergy between Willow Court and the current visitor preferences for cultural activities.

### Cluster Trends

- Hobart is the key in driving both visitors and locals to the Willow Court experience.
- It is a major gateway for most market segments and continues to perform well, particularly regarding interstate short breaks; 62% stay in Hobart. Willow Court must be positioned to take advantage of this increasing market.
- Hobart and surrounds attracts approximately 500,000 overnight visitors, presenting major opportunities for Willow Court as a highly accessible destination.

- The international market has been stable over the last four years; according to the TVS, Hobart hosted 95,638 overseas visitors to in the year ending March 2006, up 0.1% on 2005.

## Target markets

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### Our Most Profitable Prospects

- To ensure success, Willow Court will need to attract those market segments whose interests and expenditure will promote the development of a sustainable visitor experience. Those key segments have been identified as the:
  - Affluent Older age group
  - Young Couples/Solos
  - The Lower Income, Older age group

Each segment is looking for different holiday experiences which should inform Willow Court's product development. The table below provides an outline of the type of experiences sought by the key segments, and their potential 'fit' for Willow Court.

Key Segment	Holiday Experience	Potential
Affluent Older	Educative, an opportunity to learn, experiences that are unique, rewarding and reinforce their identity as interesting and worldly. Strong mind/body/spiritual focus. Seek cultural immersion based on personal or historical significance. This group has money and is willing to spend.	Good fit with the Willow Court project objectives to develop an innovative, unique and meaningful place to visit.
Young Couples/Solos	Career oriented, looking for escape, higher income, like shopping, excitement, fun, variety. Seek holiday experiences that are unique and different from their daily life. Developing an interest in societal issues.	Latest research suggests that this group mature into the Affluent Older segment and hold similar aspirations albeit at a younger age. Positive synergy with Willow Court, but may be enhanced by some innovative packaging based on a product mix.
Lower Older	Discovery, learning, value for money. Interested in meeting people inc. locals.	Willow Court's vision includes a place of living and learning. Interpretation will connect visitors with the local stories. Price point is an issue, but joint passes or similar could allow a 'good value' experience. Less potential than the other two segments.

Source: Quantum Market Research 2/2004 & BDA Market Planning 05

### Holiday Types

- BDA has developed descriptive classifications for Tasmania’s key holiday types. The following table represents priority markets for Willow Court:

Holiday Type	Duration	Key Segments	Key Market Characteristics
Big Tour	12 – 14 nights	Across all types but strong Affluent Older and Lower Older	Largest holiday visitor group. 44% of total visitor spend. Preferred activities inc. bushwalking, visiting National Parks and historic sites
Short Tour	6-7 nights	Mostly older or younger couples	Second largest group at 23%. 22% of total visitor spend. Activities are geared towards nature and historical attractions.
Short Break	1-3 nights	Affluent Families, Lower Older, some younger segments	Day trips out of the major gateways. Preferred activities include historic sites, shopping, food and wine.

Source: Quantum Market Research 2/2004 & BDA Market Planning 05

- The main visitors to Willow Court will be drawn from the Big Tour holiday types, as part ‘The Rivers Run’ touring route.
- The Short Break market has strong potential but there are conditions on the level of interest. These include Willow Court’s ability to compete with existing and emerging iconic experiences, particularly Mt. Field National Park combined with the Maydena Hauler, and the degree of repeat visitation that might encourage increased travel beyond the major gateways, particularly Hobart.
- Other market segments, including Grand Tour, Getaway and Fly and Stay are secondary opportunities given either their lower visitation numbers and/or traveling patterns.

### International research

The Willow Court experience is also well matched with some of the latest international research regarding social megatrends. In a recent study entitled ‘Tourism of Tomorrow – Travel Trends and Forces of Change’, the European Research Institute noted a strong backlash in the face of globalization manifested in an increased focus on individualism and self-development, experiences of transformation, a quest for meaning and a search for authentic products.<sup>6</sup>

<sup>6</sup> Sara Nordin, ‘Tourism of Tomorrow; Travel Trend and Forces of Change’, European Tourism Research Institute

## **Other key markets – trends and opportunities**

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### **Internationals**

- 112,300 or 14% of all visitors to Tasmania are from overseas; 62% visit an historic attraction or site.<sup>7</sup>
- Willow Court's key markets are likely to come from the United Kingdom or USA/Canada; the emerging markets of China, Korea and India may be less attracted to Tasmanian product and experiences.
- The inbound market has withheld strong downward trends in domestic tourism, and while it is slowing, it is still performing relatively well.
- The figures below suggest New Norfolk still has considerable room for growth in the international market. As with other visitor segments, the challenge remains to attract more overnight stays.

### **New Norfolk Visitor Profile**

#### **International Visitation**

- The TVS shows that in the year ending December 05:
  - 14,530 people passed through New Norfolk – up 11.3%
  - 9,067 people stopped in New Norfolk – up 16.8%
  - 3,476 people stayed the night in New Norfolk – down 5.1% on 2004.

#### **Intrastate/VFR's**

- Local support is crucial in the success of any visitor attraction; in this instance there is a significant feeder population 'on the doorstep'.
- Tasmanians took approximately 4 million day trips in 2005, with the majority being drawn from the Greater Hobart area, which represents over 200,000, or almost 42% of Tasmania's total population of 480,000.
- Families with children are the predominant group, however they are not perceived as having a strong interest in the Willow Court experience.
- Tasmanians travel for shopping, socializing and sightseeing.
- Although the VFR market is growing, it's spend is small in comparison with other groups and typically there is little interest in paying to visit attractions.
- The Tasmanian market holds the key to the VFR response, having the strongest influence on visitor activities and choices.

#### **Groups<sup>8</sup>**

- There is potential to draw visitors from a variety of group travel markets, including:
  - conference market
  - coach market/interstate
  - coach market/intrastate
  - cruise ship market
  - special interest groups.

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<sup>7</sup> TVS 12/05

<sup>8</sup> Groups should be viewed as a secondary source of visitation; they tend to be a high volume, low yield sector.

### ***Conference Market***

The conference market decreased by 19% in 2005, attracting 23,000 visitors. However, it remains a consideration for Willow Court given its proximity to Hobart for:

- pre/post conference itineraries
- the potential multi-purpose nature of the site as an events venue.

### ***Coach Market - Interstate***

The organized coach tour market is stable at about 4% of overall visitation and 27,000 visitors in 2005. This market is often difficult to access, is particularly focused on our iconic destinations and rarely deviates from an existing itinerary. It is also very price sensitive, operates within strict time-frames and an attraction's success often depends on its location in terms of the overall schedule for the trip.

### ***Coach Market – Intrastate***

The size of this market is unknown, but regardless of origin, both interstate and intrastate share similar characteristics. However, there are at least four major coach companies in Tasmania offering weekend packages, day trips and extended touring for individuals, clubs and other special interest groups. As many travelers are retirees with flexible lifestyles, this market may be useful in filling quieter periods.

### ***Cruise Ship Market***

Attracting 31,500 with a forecast average daily spend of \$137 in 2005/06, this market is experiencing strong growth. The majority of cruise ships berth in Hobart which positions Willow Court as part of an achievable and varied day trip. Passengers have a distinct demographic; most are over 50 years of age and generally, they are highly educated. These visitors have strong links with the Affluent Older and Lower Older BDA demographics; a unique and engaging experience exploring Tasmania's social history is likely to present as an attractive day out.

### ***Special Interest Groups***

Information regarding this market is difficult to quantify. The TVS includes an 'education' category in their 'reason for visit' data but the sample size is too small and there are too many variables to extract a meaningful response. However, given Willow Court's rich and varied story, it is reasonable to assume that interested groups may be drawn from:

Alumni groups, international study tours, those with an interest in architecture, convict history, social history, mental health, botany, community-building and their many sub-sets.

Anecdotal evidence suggests a strong interest from school groups, however further research is required to substantiate it.

## **Summary of opportunities and issues**

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- The Tasmanian tourism industry is undergoing major structural change due to a combination of factors:
  - the current visitor mix is driving down yield
  - industry growth has also stalled.

The risks associated with these trends must be managed carefully through active, realistic and informed planning.

- Willow Court's broader success will be greatly assisted by developing cooperative relationship with other industry partners. These should reflect:
  - the diversity of experiences required to boost visitor appeal across key segments
  - the opportunities to extend overnight stays in the region.
- 'The Rivers Run' Touring Route will need to continue attracting visitors to the region as a whole. The ability to do so will require further cluster development, ensuring a critical mass of smaller, market-led products that support the 'Rivers Run' brand.
- The opening of the Maydena Hauler is a major opportunity for the Derwent Valley, however the time factor may preclude Willow Court from obtaining maximum leverage from this product.
- Hobart will be an important driver for visitation to Willow Court.
- The 21<sup>st</sup> century traveller is on a journey of life-long learning, seeking experiences that will enrich, educate and entertain. The days of passive visitor attractions and detached observation are long gone. The success of Willow Court will depend on a clear appreciation of the needs and expectations of key market segments, acknowledged through a range of engaging product offerings.

## **Marketing activities**

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### **Key Objective**

**To develop a sustainable and vibrant visitor experience in the Barracks and Bronte precinct of the Willow Court site.**

In summary, the ability to achieve the key objective will be driven by three core issues:

- A critical mass of attractions in New Norfolk; Willow Court is unlikely to be a stand-alone product in the near future and its success will be linked to other local activities.
- The strength of regional visitation; this has two related aspects – the ability of 'The Rivers Run' touring route to maintain visitor interest and the broader trend towards short breaks out of Hobart.
- The capacity for Willow Court to take a lead role in developing strategic and cohesive partnerships with appropriate businesses throughout the Derwent Valley.

The current situation analysis suggests that the future of Willow Court is less related to market growth, and more about market share. The strength of competing product should be constantly monitored.

## **Marketing Mix**

Successful marketing is underpinned by the 7 'P's, otherwise known as the marketing mix. The first 4 'P's relate to *product* delivery, the remainder to *service* delivery.

## **1. PRODUCT**

### **RATIONALE**

#### **The Research**

The Willow Court Visitor Experience has no comparative product. While this provides a unique selling position, it also presents a range of challenges in ascertaining potential customers. However, qualitative research has suggested an optimistic level of interest, particularly in relation to an art-led approach to the story of Willow Court.<sup>9</sup> The product has been shaped to appeal to the visitor segments identified in the market analysis.

Quantitative data provided through the TVS, suggests that interstate and international visitors to New Norfolk have a significantly higher interest in visiting historic sites and galleries than those who travel to other parts of Tasmania. For example, of the 165,000+ visitors to New Norfolk in 2005, 35% or 57,750 either visit galleries or have the propensity to do so - as well as participating in other related interests including visiting historic sites and museums and purchasing craft and Tasmanian food and wine.<sup>10</sup> These are all key characteristics of the ideal visitor demographic for Willow Court.

In order to gauge the critical success factors, a benchmarking exercise was undertaken with nine leading Tasmanian attractions<sup>11</sup>. Benchmarking indicated that visitors are likely to spend approximately one hour on site and the greatest interest will come from the 45+ age group. A Sydney study tour examined the adaptive re-use of some significant and challenging heritage sites including several psychiatric institutions.

#### **The Experience**

The Willow Court brand reflects a 'doorway to new perspectives'. Authenticity and respect are core values. Visitors will experience the brand through two key elements:

- a vibrant gallery space exhibiting psychiatric art and focusing on the creativity of people with mental illness; and
- an engaging and revealing interpretative journey through the hospital precinct, inviting a deeper resonance with those who have been traditionally viewed as 'outsiders'.

Visitors can self-select their level of engagement through the following core activities:

- self-guided tours of the gallery and the hospital precinct
- guided tours of the gallery and the hospital precinct.

The gallery and interpretative experience will be supported by:

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<sup>9</sup> see Appendix EMRS, Willow Court Concept Testing; Qualitative Research Report, p.40

<sup>10</sup> see Market analysis, p. 11

<sup>11</sup> see Appendix Key benchmarking data, p.48 - 51

- a café offering a small range of quality Tasmanian food and beverages and the opportunity to gather, reflect and discuss; and
- a distinctive retail outlet; merchandise will be carefully selected and linked to brand and the spirit of the site.

Merchandise will include art-based prints, postcards of the gallery works and the Derwent Valley, greeting cards, books, bookmarks and hand-made paper. Candles and other additions will be dependent on the final product detail. The café should be utilized as a display space for the prints available for purchase.

It will be crucial for the Willow Court product to be refreshed periodically; this will be particularly important for the Tasmanian market. Visiting exhibitions and creative use of the gallery space will assist in maintaining local interest.

### **The Position**

Willow Court offers a high quality experience that is not replicated anywhere else in Australia – an art-led journey into life behind the wall of one of our foremost psychiatric institutions, located on a site of profound historical significance. As such, it has a unique point of difference and a strong competitive edge.

The product represents a specialist brand identity based on lower volume visitation but higher differentiation in the market place. The brand essence, ‘a doorway to new perspectives’ reflects the promise of enrichment and transformation.

While a new tourism product often has its own initial momentum, sustainability evolves from a dynamic environment in which change is built into the product life cycle. Willow Court must be a market-led experience reflecting visitor needs and expectations over time.

### **The Business Case**

#### **Patronage**

The Marketing Plan outlines the most profitable segments of the market and the strategies required to reach them.

The following table outlines the patronage assumptions for the project over three years:

<b>Segment</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Tasmanian families (3.5 people)	200	180	150
Interstate adults	6,000	8,000	10,000
Tasmanian adults	4,000	4,000	3,500
Concessions	1,500	1,500	1,500
<b>TOTAL</b>	<b>12,200</b>	<b>14,130</b>	<b>15,525</b>

## **Charges and Fees**

Product testing in Hobart and Melbourne combined with the intrastate benchmarking exercise suggest that the following charges will be acceptable to the market:

Adults	Year 1	\$11.00*
	Year 2	\$12.00
	Year 3	\$14.00

All other charges are a calculation from those fees:

Children	50% of adult (rounded up to nearest dollar)
Family	2 adults and 1 child
Concession	Child + 10% (rounded down)

Within the revenue calculations, a 5% commission structure has been applied to all fees to cover various seasonal and local discounts as well as Travel Centre commissions, local attraction commissions etc.

## **Food and Beverage Contribution**

The average spend per head has been derived from the experiences of other Tasmanian attractions, eg. Dismal Swamp, the Tahune Airwalk and Port Arthur Historic Site. On that basis, it is reasonable to assume that the average revenue per visitor will be around \$4.50. This includes the quality delivery of coffee, snacks that are prepared off-site and simply presented at the premises, local Tasmanian wines and cheeses, and mineral waters etc.

It is assumed that due to the product being purchased from elsewhere, the Cost of Goods would be much higher (75%) than for a fully operational café (40%).

For the purposes of the Business Case, overheads relating to the F&B operations have been assessed as:

	\$
Kitchen consumables	450
Menu printing	250
Signs	450
Containers	500
Wastage	7,000
Crockery and cutlery	400

### **Serving Staff**

In the early development stages of this business (ie. the first 3 years), it is planned that the reception, F&B and retail sales are shared responsibilities with a seamless organizational structure. Therefore, there is no line item included for serving staff.

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\* all fees are based on being inclusive of GST

### **Retail Contribution**

The Willow Court visitor experience has the potential to generate additional revenues through gifts, prints, paper products and other appropriately themed items.

The Business Case works on a model regarding a pyramid of spend characteristics:

- 5% of visitors will spend \$25.00
- 30% of visitors will spend \$10.00
- 40% of visitors will spend \$5.00

This computes to an average spend of \$6.50 per person.

(It is assumed that families will not spend anything, so they have been deducted from the equation.)

Cost of Goods in retail outlets usually runs at 50% which has been used to calculate the revenues.

#### **Retail Staff**

As with F&B, it is assumed that the reception function also manages the retail sales.

### **Marketing Costs**

It has been assumed that the collateral development, imagery, ad design and layouts, launch, brochure design and initial print runs are all covered off as capital sums in the project costs, leaving a \$16,000 recurrent budget allocation (see p.44).

It is critical to the success of the project that the launch catapults the business into the marketplace – and that the small numbers of patrons required to achieve the business case results can be achieved through targeted media connections, niche marketing and mail outs (small line items) rather than major, generic advertising.

It is thought unnecessary to have a Sales Executive in Years 1-3.

	<b>\$</b>
Sales executive	0
Motor vehicle	0
Advertisements	5,000
Brochures	7,500
Web presence	3,00
Direct mail	500
<b>TOTAL</b>	<b>16,000</b>

### **Hours of Operation and Staffing**

One of the most significant items for any business case, is the sparing use of wages; these can ruin any small business in the delicate start-up phase.

## Management

The Business Case assumes that the overall management (rosters, PAYG tax, wages, BAS, creditors and overseeing) would be undertaken by a council staffer employed for two, full days a week. An overhead allowance of \$12,000 has been allocated to that function.

Policy, marketing, reporting and strategy can be managed through a Board, which would not require remuneration in Years 1-3.

There is a \$3000 sum to present simple monthly MYOB reports to the Board from an external accounting contractor.

## Opening Hours

It is assumed that the gallery/experience would open its doors at 10.00 am and close at 5.00 pm 7 days a week, and

- from 10.00 am until 12 noon, 1 person would be able to manage the reception, coffee and retail
- from 12 noon to 3.00 pm, 3 people would be rostered on to manage the business
- from 3.00 pm to 5.00 pm, this would revert to 2 people.

This is a total hourly requirement of 108 hours a week – or an equivalent of 2.75 FTE's.

With permanent part-time staff requiring a salary of \$38,000 for that role, the sum to operate the reception, food and retail is \$105,000 per annum.

In addition, a cleaner would be required for 11 hours a week and a maintenance person for 9 hours a week, adding a further \$20,250 per annum.

Nine per cent of the total salary commitment has been calculated as the superannuation contribution and a further 2.6% of that total as Workers' Compensation insurance cover.

## Overheads

The following list relates to normal business overheads that have been applied to Willow Court:

<b>Overhead</b>	<b>\$</b>
Insurances	4,500
Workers compensation	3,890
Other wages	149,603
Accounting	3,000
R&M	3,500
Publications	150
Computer support	1,440
Marketing	16,000
Energy	6,000
Telephones	2,400
Printing and stationery	900
Credit card fees	2,155

Staff costs	840
Rates and land tax	1,500

### **Business Case Summary**

The following table presents the projected results for the first three years of operation:

Business case summary			
	Year 1	Year 2	Year 3
Patron numbers	12,200	14,130	15,525
Total revenue (after GST etc)	226,412	277,787	333,572
COGS Food	50,225	56,739	61,447
COGS Retail	32,500	39,000	43,875
Other expenses	195,877	196,420	197,146
Result	-52,191	-14,373	31,104

### **Author's Notes**

Given the assumptions detailed above, the Break Even for this project is somewhere in the early stages of Year 3.

The losses (without tax, depreciation, amortization, interest, leases or any finance charges) are likely to amount to near \$70,000 in the first two years.

The Business Case assumptions are carried through from the product testing, the market analysis and the product refinement process, undertaken by the project team.

The Business Case is realistic and somewhat conservative; this is considered prudent in the light of such a new and unusual visitor attraction in New Norfolk.

Refer to the Appendix for detailed Business Case worksheets.

## **2. Price**

### **RATIONALE**

Qualitative research suggested a narrow band of acceptance regarding entry fees. Price was also determined from data gained through the benchmarking process.<sup>12</sup>

### **Goal: Establish price points that generate sales and profit**

**Strategy:** Develop a pricing strategy that is attractive to identified target markets

### **Actions:**

- ✚ Build some flexible pricing options to complement the base entry fee; two tier pricing system<sup>13</sup>, group concessions, family deals, loyalty rewards for locals.

<sup>12</sup> see also Business Case

<sup>13</sup> two tier system not currently part of the Business Case methodology but may be worth considering in the future

- ✚ Consider limited pricing offers including seasonal rates, or some that are time-specific.
- ✚ Increase perceived value through joint ticketing or promotional passes with the Salmon Ponds and Mt. Field National Park.
- ✚ Add value; work with selected accommodation providers to package the Willow Court experience – for example, the Henry Jones Art Hotel and Moorilla Estate both have good synergy with Willow Court and a range of quality properties in the Derwent Valley will be particularly important.

### 3. Place

#### RATIONALE

Unlike other tourism product, attractions are not usually booked in advance and therefore the connection with the customer does not occur through traditional wholesale/retail distribution channels. Effective distribution must focus on those access points where visitors are likely to make purchasing decisions while ‘in transit’.

#### **Goal: Maximise product purchasing opportunities**

**Strategy:** Promote Willow Court through convenient, accessible and effective distribution channels

#### **Actions:**

- ✚ Ensure a consistent supply of brochures to:
  - all members of the Tasmanian Visitor Information Network, particularly those located in key areas; due to its extremely high visitation and proximity to New Norfolk, the Hobart Centre requires priority attention
  - all ‘white i’ visitor information sites
  - accommodation providers, particularly those in Hobart and the Derwent Valley region and other attractions
  - Spirits 1 and 11 through the Tourism Brochure Exchange
  - better known/high visibility Tasmanian art galleries

Distribution often loses its impetus after the initial delivery of brochures and promotional material. Busy staff can delay re-stocking brochure racks when the source is unclear.

- ✚ Make it easy for your distributors! Include an order form with every batch of brochures to encourage uninterrupted product distribution and sales.

### 4. Promotion

#### RATIONALE

Promotion of Willow Court involves selling the benefits of the visitor experience to the identified target markets. The Business Feasibility Case indicates the highest level of interest from interstate visitors; those noted in the analysis as ‘affluent older’, younger couples and solos and the ‘lower older’ segments. The benefits must be conveyed through each layer of communication; brochures, advertising, the web site, PR, all the promotional tools that are critical in driving visitor demand. As resources are limited, it will be important to adopt the most cost-effective approach.

Creative partnerships will provide significant leverage and allow a more extended reach into the market place.

### **Goal: Effectively introduce the Willow Court experience to the market place**

**Strategy:** Make Willow Court accessible in terms of both place and information

**Actions:**

- ✚ Conduct a high profile product launch; employ a professional media agency to manage all aspects of the launch including appropriate and timely media releases, guests who will attract good coverage and a smooth operation on the day.
- ✚ Ensure well-placed signage to Willow Court; directional signage will be required off the Lyell Highway and at the site entrance:
  - liaise with Vin Gerasminok, DIER to ensure compliance with the Tasmanian Visitor Information System (TVIS)
  - seek Tourism Council Tasmania accreditation to enable eligibility for yellow on blue tourism signage.

### **Goal: Build local support and awareness with New Norfolk residents, businesses and other stakeholders**

**Strategy:** Promote Willow Court through community-based public relations activities

**Actions:**

- ✚ Ensure that key members of the community are invited to the product launch
- ✚ Use the Derwent Valley Gazette to communicate Willow Court news
- ✚ Conduct an annual, no fee 'Open Day' to showcase site developments
- ✚ Include publicity in Derwent Valley Council mail-outs to ratepayers
- ✚ Promote the art gallery as a community space; encourage art appreciation classes, special introductory tours for local business and community partners, events
- ✚ Encourage the 'Visiting Friends and Relatives' market by introducing free/discounted entry for accompanying local hosts

### **Goal: Position Willow Court as an engaging experience for the broader Tasmanian community and the VFR market**

**Strategy:** Use the local media to stimulate interest in and around Hobart as the major 'feeder' population for Willow Court

**Actions:**

- ✚ Insert a lift-out feature in ‘The Mercury’ to coincide with the product launch; acquire ‘run-ons’ for additional promotion. Include a prize coupon/draw and develop a database from the entrants.
- ✚ Build an ongoing relationship with ABC radio; provide initial information regarding the adaptive re-use of Willow Court, and follow-up stories.
- ✚ Provide editorial to local newspapers and magazines that will publish stories free of charge; advertising is often negotiable particularly if there is a special offer for readers. RACT ‘Motor News’ has an excellent distribution; the ‘Eastern Shore Sun’, the ‘Huon Valley News’ are examples of other potential media.

**Strategy:** Build relationships with key tourism providers in the Derwent Valley, Hobart and surrounding areas to on-sell Willow Court to their customers

**Actions:**

- ✚ Ensure a consistent flow of information regarding Willow Court including brochures to the Hobart Travel Centre, major accommodation providers and attractions,<sup>14</sup> Point of Sale material as required and updates regarding special deals.
- ✚ Initially, make personal sales calls to significant tourism partners around Hobart.
- ✚ Offer famils or complementary tickets to their staff.
- ✚ Use Totally South’s ‘Industry Informer’ to promote Willow Court to the Southern Tasmanian tourism industry; it has a large and focused distribution and the publicity is free!
- ✚ Host an industry networking evening through Totally South.
- ✚ Organise a display at the annual ITOT/TCT Tasmanian Tourism Conference.
- ✚ See 2.Price - Actions regarding joint packaging opportunities.

**Strategy:** Build relationships with key tourism providers throughout the State

**Actions:**

- ✚ Promote Willow Court throughout the Tasmanian Visitor Information Network as well as smaller, ‘white i’ visitor information sites.
- ✚ Actively work your key distribution channels; invite staff from the TVIN’s, Tourism Brochure Exchange and other visitor information outlets to

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<sup>14</sup> Port Arthur Historic Site is particularly important given its shared history with Willow Court

experience Willow Court free of charge; nurture their interest through a great experience and they will sell Willow Court with genuine enthusiasm!

- ✚ Liaise regularly with the Regional Tourism Associations outside Hobart; Cradle Coast Authority and Northern Tasmania Development both have Industry Development Consultants who can build awareness through their broad range of industry contacts.
- ✚ Ensure that higher profile accommodation providers and attractions in the North, North West and the West also have brochure stocks.

**Strategy:** Develop 'cultural' partnerships for mutual benefit

**Actions:**

- ✚ Market Willow Court through Hobart's arts network; its galleries - the Tasmanian Museum and Art Gallery, The Salamanca Collection and Handmark, for example;<sup>15</sup> museums and the Tasmanian School of Art.
- ✚ Promote the Willow Court gallery to the Tasmanian School of Art as a centre for art-based activities.
- ✚ Liaise with the Tasmanian School of Art regarding their 'student in residence' programme with a view to linking the student's work with Willow Court's primary themes. The results may form the basis of an exhibition on site.
- ✚ Build broader interest and support by expanding cultural partnerships State-wide to include the National Trust and the Queen Victoria Museum and Art Gallery and the Tasmanian School of Visual and Performing Arts in Launceston.
- ✚ Approach the Tasmanian Symphony Orchestra regarding performances at Willow Court.
- ✚ The larger institutions will have mailing lists and/or newsletters; seek an arrangement whereby Willow Court may be showcased through a joint promotion to patrons of the arts.

**Goal: Position Willow Court as a unique and memorable experience for Tasmania's most profitable interstate and international markets**

**Strategy:** Work with Tourism Tasmania to acquire leverage into the 'Affluent Older', 'Young Couples/Solos' and 'Lower Older' segments, as well as key international markets

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<sup>15</sup> see Hobart's 'Gallery Guide' for a more comprehensive list

**Actions:**

- ✚ Invite John Pugsley, Tourism Tasmania's Director of Marketing to an on-site meeting at Willow Court to familiarize him with the product. Seek his advice regarding the various ways in which the marketing unit can assist in the interstate promotion of Willow Court. Similarly, Karen Fraser, Manager International Marketing. Tourism Tasmania can facilitate some excellent opportunities that do not always require a direct financial contribution.
- ✚ Conduct a famil for other key Tourism Tasmania staff.
- ✚ Ensure that Willow Court has a presence on the Tourism Tasmania's consumer web site, [www.discovertasmania.com](http://www.discovertasmania.com)
- ✚ Build a strong relationship with the Visiting Journalist Program; provide a professionally produced CD ROM for use with the travel trade and the media. Visiting journalists will be attracted to the uniqueness of Willow Court and will provide publicity that is invaluable, both interstate and overseas.
- ✚ Use Tourism Tasmania's corporate web site as an important research tool regarding market trends and other key tourism insights.
- ✚ Forward targeted information for inclusion in 'Natural State News; Tourism Tasmania's Media Newsbrief'. It's free and has an excellent distribution to the media and the travel trade.

**Strategy:** Influence pre-travel decisions to include Willow Court through advertising and promotion that is brand-aligned, timely and cost-effective.

**Actions:**

- ✚ Package Willow Court with selected industry partners and place advertisements in the following travel publications:
  - Travelways
  - Entrée magazine
  - Treasure IslandRequest advertorial for best value.
- ✚ Contact the Hobart office of 'The Australian' and ask for an article in the Weekend Magazine.
- ✚ Develop a high quality web site; seek links with other key sites including 'The Rivers Run', Tourism Tasmania's [www.discovertasmania.com](http://www.discovertasmania.com), the Cunningham Dax Collection, the Tasmanian Museum and Art Gallery and other selected industry partners.
- ✚ Build wider promotional networks with interstate galleries, particularly the Cunningham Dax Collection, but also the Orange Regional Gallery, NSW and the Campbelltown Arts Centre on the outskirts of Sydney; both these galleries have supported and exhibited 'Outsider Art' in 2006.

- ✚ Target mainland art lovers through selected art magazines; ‘Australian Art Collector’, ‘Craft Arts International’ and ‘Art Gallery Guide Australia’ provide editorial, gallery listings and previews of upcoming exhibitions. Seek free or low cost space.
- ✚ Develop a special package tour – an ‘art menu’, for members of Art Gallery Societies<sup>16</sup> in Tasmania’s key markets of New South Wales and Victoria; showcase Hobart and the Derwent Valley region through alliances with industry and ‘cultural’ partners. The Art Gallery Society of NSW magazine, ‘Look’ is a good example of the way in which such packages can be promoted; similarly ‘Gallery’ magazine produced by The Art Gallery of Victoria. Both have very targeted audiences and good distribution.

**Strategy:** Influence ‘during travel’ decisions to include Willow Court through timely and cost-effective advertising and promotion

**Actions:**

- ✚ Capitalise on the 237,000 annual visitors currently passing through the door of Hobart Travel Centre; organize a joint promotion showcasing Willow Court and the Derwent Valley region.
- ✚ Place brand-aligned advertisements, combined with advertorial in the following publications:
  - Hobart and Southern Touring Routes Touring Guide
  - This Week in Tasmania

**KEY MARKETING ACTIVITIES – SERVICE DELIVERY**

**5. People**

**RATIONALE**

Good people are great for business! They are your most important asset and play a vital role in supporting ‘external’ marketing activities. Anyone who comes in contact with visitors at Willow Court will make an impression on them; they have the capacity to convey a profound image of the overall experience. The reputation of your brand rests in the hands of your staff. While marketing and promotion often absorb substantial resources, their effectiveness is either diminished or enhanced by the quality of customer service.

Willow Court is likely to involve a mix of paid staff – a manager, tour guides, a ticketing officer, food and beverage attendants and cleaners. The gallery will require curatorial skills. There may be some cross-over in duties. Some tasks might be performed by local volunteers.

**Goal: Underpin the Willow Court experience with an internal culture and values system that reflects the brand**

**Strategy:** Develop a strong skills base matched with effective product delivery

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<sup>16</sup> search the Internet under Art Gallery Societies for a comprehensive listing

### **Actions:**

- ✚ Ensure that all those who present the ‘public face’ of Willow Court have a high level of interpersonal skills.
- ✚ Provide specific training in people skills – ie. customer relationship marketing, meshed with work skills.
- ✚ Consider tasks that enable local residents to animate the site; gardening is a good example. They will become ambassadors, promoting the experience in a friendly, unstructured way.
- ✚ Develop a culture of open and positive communication between management and staff and volunteers
- ✚ Conduct a skills assessment for the effective delivery of the Willow Court experience.
- ✚ Engage a Registered Training Organisation (RTO) to deliver a training and development package tailored to your requirements.
- ✚ Seek funding and further assistance through the Workforce Skills Development Fund, available through the Department of Economic Development
- ✚ Ensure that all staff and volunteers have a clear understanding of their specific tasks and responsibilities.
- ✚ Employ specific motivators; personal encouragement, job enrichment and recognition; while this approach should apply to all concerned, particular acknowledgment should be given to those who are not paid for their services.

## **6. PROCESS**

### **RATIONALE**

The way in which the Willow Court experience is delivered will have a strong impact on visitor perception; this relates from pre-visit to departure from the site.

### **Goal: Establish efficient and user-friendly processes and procedures**

**Strategy:** Ensure that the site management is visitor-focused

### **Actions:**

- ✚ Actively assess all processes and procedures in terms of ease, convenience, efficiency, and seamlessness; these will include marketing messages, site orientation, visitor information, ticketing, retail, tours, traffic flow, access, the full range of services and facilities.
- ✚ Consider building on the benchmarking process to critically evaluate internal procedures; approach the initial participants with a view to sharing information and experiences to ascertain ‘best practice’.

## 7. PHYSICAL EVIDENCE

### RATIONALE

‘Appearance is everything’. Well perhaps that’s not quite so, but the last of the 7 ‘P’s is one that can send important signals to visitors.

**Goal: Ensure that all ‘external’ components support a quality Willow Court experience**

**Strategy:** Integrate the physical and natural settings with the product, to present a consistent brand image

### Actions:

Ensure that:

- ✚ staff are well presented and easily identified
- ✚ all facilities are clean and clearly signed
- ✚ displays are professionally mounted, with an engaging presentation
- ✚ the grounds are tidy and litter-free
- ✚ arrival spaces are well designed and welcoming
- ✚ signage is conveniently placed and user friendly
- ✚ merchandise is appropriate to the product

## Performance Measurement

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### RATIONALE

The key objective is to **develop a sustainable and vibrant visitor experience in the Barracks and Bronte precinct of the Willow Court site.**

Two major, measurable outcomes are linked to this objective:

- to meet the business targets identified in the Business Case; and
- to generate an increase in overnight stays in New Norfolk and the Derwent Valley region.

Continuous and purposeful monitoring is required to ensure that Willow Court is ‘on track’ to achieve these goals. Information gathering should include both an internal and external focus; visitor feedback and broader trend data acquired through a range of related sources.

Rigorous performance measurement is often difficult to achieve in smaller businesses where the focus is on day-to-day operations.

To assist in this process, consider approaching the School of Tourism at the University and/or Drysdale’s Tourism Industry Solutions; they are often looking for suitable projects for students, including research and survey work.

## Actions

### Internal

- ✚ Survey Willow Court visitors on site; provide a user-friendly form and the opportunity to win a merchandise pack as an added incentive. (See separate document for Rocks Museum example.) Ensure the opportunity for anonymity.
- ✚ Keep accurate visitor numbers.
- ✚ Adopt a positive view regarding complaints; they are often an opportunity to improve the experience.
- ✚ Continuously monitor and evaluate all visitor feedback – and take action where appropriate!
- ✚ Build on the initial benchmarking project and continue the process with selected visitor attractions throughout the State.
- ✚ Consider using the ‘Mystery Shopper’ concept once the product is established.
- ✚ Talk to visitors! Useful comments are often best expressed in an informal setting.

## Actions

### External

- ✚ Use the latest data from Tourism Tasmania’s Market Research Unit to calculate market share.
- ✚ Use Tourism Tasmania’s Tasmanian Visitor Survey to monitor and compare visitor numbers, preferred activities, travelling patterns and other relevant information.
- ✚ Check local trends; ensure that visitor numbers are recorded at the New Norfolk visitor information centre, seek input from other tourism businesses.
- ✚ Monitor web site traffic.
- ✚ Track advertising and other promotional activities through the visitor survey form.

## Review

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The Marketing Plan should be considered a ‘living’, evolving document, highly responsive to performance and change. The review process should be factored into the operations plan, so that it is not shelved in favour of more immediate tasks. It may be tied to annual budgetary activities, for example.

At the very least, the Marketing Plan should be revisited every twelve months and ultimately at the end of its three-year life cycle.

Tourism is a volatile and potentially vulnerable industry often affected by events that occur at some distance from the host community. The Marketing Plan may require adjustment to accommodate the repercussions of an unexpected and major shift in travelling patterns; terrorist activities, environmental disasters and air access into Tasmania are typical of the external issues that can have both positive and negative impacts on local businesses.

## Implementation Plan

<b>Strategy 1</b>		
<b>Develop a pricing strategy that is attractive to identified target markets</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Build some flexible pricing options to complement the base entry fee; group concessions, family deals, loyalty rewards for locals.	Year 1	
Consider limited pricing offers including seasonal rates, or some that are time-specific.	Year 1	
Increase perceived value through joint ticketing or promotional passes with the Salmon Ponds and Mt. Field National Park.	Year 1	
Add value; work with selected accommodation providers to package the Willow Court experience – for example, the Henry Jones Art Hotel and Moorilla Estate both have good synergy with Willow Court and a range of quality properties in the Derwent Valley will be particularly important.	Year 1	
<b>Strategy 2</b>		
<b>Promote Willow Court through convenient, accessible and effective distribution channels</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Ensure a consistent supply of brochures to: <ul style="list-style-type: none"> <li>• all members of the Tasmanian Visitor Information Network, particularly those located in key areas; due to its extremely high visitation and proximity to New Norfolk, the Hobart Centre requires priority attention</li> <li>• all 'white i' visitor information sites</li> <li>• accommodation providers, particularly those in Hobart and the Derwent Valley region and other attractions</li> <li>• Spirits 1 and 11 through the Tourism Brochure Exchange</li> <li>• better known/high visibility Tasmanian art galleries</li> </ul>	Year 1 /ongoing	
<b>Strategy 3</b>		
<b>Make Willow Court accessible in terms of both place and information</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Conduct a high profile product launch; employ a professional media agency to manage all aspects of the launch including appropriate and timely media releases, guests who will attract good coverage and a smooth operation on the day.	Immediate	

Ensure well-placed signage to Willow Court; directional signage will be required off the Lyell Highway and at the site entrance: <ul style="list-style-type: none"> <li>liaise with Vin Gerasminok, DIER to ensure compliance with the Tasmanian Visitor Information System (TVIS)</li> <li>seek Tourism Council Tasmania accreditation to enable eligibility for yellow on blue tourism signage.</li> </ul>	Immediate	
<b>Strategy 4 Promote Willow Court through community-based public relations activities</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Ensure that key members of the community are invited to the product launch.	Immediate	
Use the Derwent Valley Gazette to communicate Willow Court news.	Immediate and ongoing	
Conduct an annual, no fee 'Open Day' to showcase site developments.	Year 1/ongoing	
Include publicity in Derwent Valley Council mail-outs to ratepayers.	Year 1/ongoing	
Promote the art gallery as a community space; encourage art appreciation classes, special introductory tours for local business and community partners, events.	Year 1/ongoing	
Encourage the 'Visiting Friends and Relatives' market by introducing free/discounted entry for accompanying local hosts.	Year 1/ongoing	
<b>Strategy 5 Use the local media to stimulate interest in and around Hobart as the major 'feeder' population for Willow Court</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Insert a lift-out feature in 'The Mercury' to coincide with the product launch; acquire 'run-ons' for additional promotion. Include a prize coupon/draw and develop a database from the entrants.	Immediate	
Build an ongoing relationship with ABC radio; provide initial information regarding the adaptive re-use of Willow Court, and follow-up stories.	Year 1/ongoing	
Provide editorial to local newspapers and magazines that will publish stories free of charge; advertising is often negotiable particularly if there is a special offer for readers. RACT 'Motor News' has an excellent distribution; the 'Eastern Shore Sun', the 'Huon Valley News' are examples of other potential media.	Year 1/ongoing	
<b>Strategy 6 Build relationships with key tourism providers in the Derwent Valley, Hobart and surrounding areas to on-sell Willow Court to their customers</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Ensure a consistent flow of information regarding Willow Court including brochures to the Hobart Travel Centre, major accommodation providers and attractions, <sup>17</sup> Point of Sale material as required and updates regarding special deals.	Year 1/ongoing	

<sup>17</sup> Port Arthur Historic Site is particularly important given its shared history with Willow Court

Initially, make personal sales calls to significant tourism partners around Hobart.	Immediate/ongoing	
Offer famils or complementary tickets to their staff.	Immediate/ongoing	
Use Totally South's 'Industry Informer' to promote Willow Court to the Southern Tasmanian tourism industry; it has a large and focused distribution and the publicity is free!	Immediate/ongoing	
Host an industry networking evening through Totally South.	Year 1	
Organise a display at the annual ITOT/TCT Tasmanian Tourism Conference.	Year 1/ongoing	
See 2. Price - Actions regarding joint packaging opportunities.		
<b>Strategy 7 Build relationships with key tourism providers throughout the State (see also Strategy 2)</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Promote Willow Court throughout the Tasmanian Visitor Information Network as well as smaller, 'white i' visitor information sites.	Year 1/ongoing	
Actively work your key distribution channels; invite staff from the TVIN's, Tourism Brochure Exchange and other visitor information outlets to experience Willow Court free of charge; nurture their interest through a great experience and they will sell Willow Court with genuine enthusiasm!	Year 1/ongoing	
Liaise regularly with the Regional Tourism Associations outside Hobart; Cradle Coast Authority and Northern Tasmania Development both have Industry Development Consultants who can build awareness through their broad range of industry contacts.	Year 1/ongoing	
Ensure that higher profile accommodation providers and attractions in the North, North West and the West also have brochure stocks.		
<b>Strategy 8 Develop 'cultural' partnerships for mutual benefit</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Market Willow Court through Hobart's arts network; its galleries - the Tasmanian Museum and Art Gallery, The Salamanca Collection and Handmark, for example; <sup>18</sup> museums and the Tasmanian School of Art.	Year 1/ongoing	
Promote the Willow Court gallery to the Tasmanian School of Art as a centre for art-based activities.		
Liaise with the Tasmanian School of Art regarding their 'student in residence' programme with a view to linking the student's work with Willow Court's primary themes. The results may form the basis of an exhibition on site.	Year 1/ongoing	
Build broader interest and support by expanding cultural partnerships State-wide to include the National Trust and the Queen Victoria	Year 1/ongoing	

<sup>18</sup> see Hobart's 'Gallery Guide' for a more comprehensive list

Museum and Art Gallery and the Tasmanian School of Visual and Performing Arts in Launceston.		
Approach the Tasmanian Symphony Orchestra regarding performances at Willow Court.	Year 1	
The larger institutions will have mailing lists and/or newsletters; seek an arrangement whereby Willow Court may be showcased through a joint promotion to patrons of the arts.	Year 1/ongoing	
<b>Strategy 9</b>		
<b>Work with Tourism Tasmania to acquire leverage into the 'Affluent Older', 'Young Couples/Solos' and 'Lower Older' segments, as well as key international markets</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Invite John Pugsley, Tourism Tasmania's Director of Marketing to an on-site meeting at Willow Court to familiarize him with the product. Seek his advice regarding the various ways in which the marketing unit can assist in the interstate promotion of Willow Court. Similarly, Karen Fraser, Manager International Marketing. Tourism Tasmania can facilitate some excellent opportunities that do not always require a direct financial contribution.	Immediate	
Conduct a fam for other key Tourism Tasmania staff.	Immediate/ongoing	
Ensure that Willow Court has a presence on the Tourism Tasmania's consumer web site, <a href="http://www.discovertasmania.com">www.discovertasmania.com</a>	Immediate/ongoing	
Build a strong relationship with the Visiting Journalists Programme; provide a professionally produced CD ROM for use with the travel trade and the media. Visiting journalists will be attracted to the uniqueness of Willow Court and will provide publicity that is invaluable, both interstate and overseas.	Immediate/ongoing	
Use Tourism Tasmania's corporate web site as an important research tool regarding market trends and other key tourism insights.	Ongoing	
Forward targeted information for inclusion in 'Natural State News; Tourism Tasmania's Media Newsbrief'. It's free and has an excellent distribution to the media and the travel trade.	Immediate/ongoing	
<b>Strategy 10</b>		
<b>Influence pre-travel decisions to include Willow Court through advertising and promotion that is brand-aligned, timely and cost-effective</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Package Willow Court with selected industry partners and place advertisements in the following travel publications: <ul style="list-style-type: none"> <li>• Travelways</li> <li>• Entrée magazine</li> <li>• Treasure Island</li> </ul> <i>Request advertorial for best value.</i>	Immediate/ongoing	
Contact the Hobart office of 'The Australian' and request an article in	Year 1	

the Weekend Magazine.		
Develop a high quality web site; seek links with other key sites including 'The Rivers Run', Tourism Tasmania's www.discovertasmania.com, the Cunningham Dax Collection, the Tasmanian Museum and Art Gallery and other selected industry partners.	Immediate	
Target mainland art lovers through selected art magazines; 'Australian Art Collector', 'Craft Arts International' and 'Art Gallery Guide Australia' provide editorial, gallery listings and previews of upcoming exhibitions. Seek free or low cost space.	Year 1/ongoing	
Develop a special package tour – an 'art menu', for members of Art Gallery societies <sup>19</sup> in Tasmania's key markets of New South Wales and Victoria; showcase Hobart and the Derwent Valley region through alliances with industry and 'cultural' partners. The Art Gallery Society of NSW magazine, 'Look' is a good example of the way in which such packages can be promoted; similarly 'Gallery' magazine produced by The Art Gallery of Victoria. Both have very targeted audiences and good distribution.	Year 1/ongoing	
<b>Strategy 11</b>		
<b>Influence 'during travel' decisions to include Willow Court through timely and cost-effective advertising and promotion</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Capitalise on the 237,000 annual visitors currently passing through the door of Hobart Travel Centre; organize a joint promotion showcasing Willow Court and the Derwent Valley region.	Year 1	
Place brand-aligned advertisements, combined with advertorial in the following publications: <ul style="list-style-type: none"> <li>• Hobart and Southern Touring Routes Touring Guide</li> <li>• This Week in Tasmania</li> </ul>	Year 1	
<b>Strategy 12</b>		
<b>Develop a strong skills base matched with effective product delivery</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Ensure that all those who present the 'public face' of Willow Court have a high level of interpersonal skills.	Immediate/ongoing	
Provide specific training in people skills – ie. customer relationship marketing, meshed with work skills.	Immediate/ongoing	
Consider tasks that enable local residents to animate the site; gardening is a good example. They will become ambassadors, promoting the experience in a friendly, unstructured way.	Year 1	
Develop a culture of open and positive communication between management and staff and volunteers.	Immediate/ongoing	
Conduct a skills assessment for the effective delivery of the Willow Court	Immediate/ongoing	

<sup>19</sup> search the Internet under Art Gallery Societies for a comprehensive listing

experience.		
Engage a Registered Training Organisation (RTO) to deliver a training and development package tailored to your requirements.	Immediate/ongoing	
Seek funding and further assistance through the Workforce Skills Development Fund, available through the Department of Economic Development.	Immediate/Year 1	
Ensure that all staff and volunteers have a clear understanding of their specific tasks and responsibilities.	Immediate/ongoing	
Employ specific motivators; personal encouragement, job enrichment and recognition; while this approach should apply to all concerned, particular acknowledgment should be given to those who are not paid for their services.	Immediate/ongoing	
<b>Strategy 13</b>		
<b>Ensure that the site management is visitor-focused</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Actively assess all processes and procedures in terms of ease, convenience, efficiency, and seamlessness; these will include marketing messages, site orientation, visitor information, ticketing, retail, tours, traffic flow, access, the full range of services and facilities.	Immediate/ongoing	
Consider building on the benchmarking process to critically evaluate internal procedures; approach the initial participants with a view to sharing information and experiences to ascertain 'best practice'.	Year 1/ongoing	
<b>Strategy 14</b>		
<b>Integrate the physical and natural settings with the product, to present a consistent brand image</b>		
<b>Actions</b>	<b>Timing</b>	<b>Responsibility</b>
Ensure that: <ul style="list-style-type: none"> <li>• staff are well presented and easily identified</li> <li>• all facilities are clean and clearly signed</li> <li>• displays are professionally mounted, with an engaging presentation</li> <li>• the grounds are tidy and litter-free</li> <li>• arrival spaces are well designed and welcoming</li> <li>• signage is conveniently placed and user friendly</li> <li>• merchandise is appropriate to the product</li> </ul>	Immediate/ongoing	

## **Appendices**

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EMRS, Willow Court Concept Testing; Qualitative Research Report	<b>36</b>
Willow Court Initial Marketing Budget and Programme	<b>39</b>
Key Benchmarking Data	<b>41</b>
Benchmarking Questionnaire (provided under separate cover)	
The Rocks Discovery Museum Survey Form (provided under separate cover)	

# **Valley Vision Willow Court Concept Testing Qualitative Research Report**

Prepared for the

**Derwent Valley Council**

Prepared by

**Enterprise Marketing & Research Services Pty. Ltd.,  
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**July 2006**





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# Summary of the Report

## THE PRODUCT CONCEPTS

The purpose of the research was to test 2 product concepts for the development of Willow Court as an attraction for Tasmanians and for visitors to Tasmania.

The first product concept to be tested was the attraction of the buildings, the history, and the stories of the patients and staff of Willow Court during its evolution over nearly 2 centuries as a mental institution and a place for treating people with psychiatric illnesses. The name "Life Behind the Wall" has been used for this concept.

The second product concept to be tested was that the subject to be fronted by outsider art produced by people who had been confined to mental institutions or otherwise incarcerated. The name "Art behind the Wall" was given to this second concept.

## OVERALL RESULTS

A majority of people in all 3 groups thought that each of the concepts would make a good attraction and that they probably would visit it. Support was stronger for the "Art Behind the Wall" concept and a number of people in Melbourne who were not attracted to the "Life Behind the Wall" concept supported the "Art Behind the Wall" concept.

## CONCLUSION

Our conclusion is that the concept of developing Willow Court as an attraction for tourists and Tasmanians has the potential to succeed, particularly if the "Art behind the Wall" concept is used as the lead element of the attraction. Participants in the groups were drawn from segments of the Tasmanian population and interstate visitors who are likely to visit attractions.

However, it must be appreciated that concept testing is usually only the 3<sup>rd</sup> stage of the 8 major stages in the development of a new product.

1. IDEA GENERATION
2. SCREENING
3. CONCEPT TESTING
4. MARKETING STRATEGY
5. BUSINESS ANALYSIS
6. PRODUCT DEVELOPMENT
7. TEST MARKETING
8. COMMERCIALISATION

There are still many matters to be resolved, including some that have been raised by group participants, and processes to go through before the product could be placed on the market and Willow Court opened to the public.

## Marketing budget and programme

### INITIAL MARKETING COSTS

ELEMENT	DETAIL	COST
PR	Journalist to manage launch, media releases etc.	4,000
	Launch costs/entertainment etc.	4,000
Collateral	Letterhead, stationery, business cards	1,500
	DL Printing (100,000)	6,000
	Images (separate budget)	TBA
	Posters/POS material	1,500
Web Site	Development and launch	6,000
Distribution	TVIN's (approx. 20); brochure display costs + postage	1,000
	Other Tasmanian attractions, accommodation providers and 'white i' sites inc. personal visit to major Hobart operators & postage/freight as required	1,000
	Tasmanian Brochure Exchange: Spirits I & II + Port of Melbourne and D'port terminals	2,500
Advertising/Promotion	Travelways ¼ page (\$880x6)	5,280
	This Week in Tasmania (\$400x12)	4,800
	Treasure Island ¼ page (\$880x6)	5,280
	Entrée ¼ page ( \$417x 12)	5,004
	Hobart and Southern Touring Routes Touring Guide; ½ page	4,000
	The Mercury: Lift-out feature for product launch	7,500
	Production of CD ROM for travel trade and media	2,000
	Visiting Journalist Program	1,000
Signage	Entry and directional on Highway	2,500
Other ('Opportunistic' Budget)	Cooperative promotions with other regional attractions, targeted magazine advertorial etc.	10,000
<b>TOTAL</b>		<b>\$74,864</b>

**INITIAL MARKETING PROGRAMME**

Pre – travel: capitalised 'one-off' start-up costs = <b>\$58,864.00</b>		During travel: recurrent costs = <b>\$16,000.00</b>
PR	Journalist to manage launch, media releases etc. \$4000 Launch costs/entertainment etc. \$4000	
Collateral	Letterhead, stationery, business cards \$1500 DL Printing \$3000 (50%) Posters/Point of Sale material \$1500	DL Printing \$3000 (50%)
Web site	Development and launch \$6000	
Distribution	TVIN's (approx. 20); brochure display costs + postage \$1000	Other Tasmanian attractions, accommodation providers and 'white i' sites inc. personal visit to major Hobart operators & postage/freight as required 1000 Tasmanian Brochure Exchange:, Spirits I & II + Port of Melbourne and D'port terminals \$2500
Advertising/Promotion  C \$15,182* R \$9,182*	Travelways ¼ page (\$880x6) This Week in Tasmania (\$400x12) Treasure Island ¼ page (\$880x6) Entrée ¼ page ( \$417x12) The Mercury: Lift-out feature for product launch \$7,500 Production of CD ROM for travel trade and media \$2000	Visiting Journalist Program \$1000
* The initial agency costs of developing the creative and designing these advertisements have been capitalized as a 'one-off' expense, incurred prior to opening. The placement of the advertisements has been allocated to the ongoing recurrent budget.		
Signage	Entry and directional on Highway \$2,500	
Other ('Opportunistic' Budget)	Cooperative promotions with other regional attractions, targeted magazine advertorial etc. \$10,000	

# **Willow Court Visitor Services Project**

## **Benchmarking Regional Visitor Attractions in Tasmania**

### **INTRODUCTORY COMMENTS**

The purpose of benchmarking within the context of this project is to examine those measures that most significantly impact on the success of a visitor attraction. By implication, that will include a comparison of some statistical outcomes; visitor numbers, entrance fees and average retail sales, as well as qualitative information; the use of interpretation, technological innovation, visitor flow and the overall amenity of the site.

As the Willow Court visitor experience becomes operational, the next level of benchmarking should be introduced – ie. comparative models of good practice that drive the continuous assessment of every aspect of the site and encourage a high quality, innovative and sustainable attraction.

### **SCOPE**

The history of Willow Court is unique and has no direct comparison with any other public space in Tasmania; similarly the potential visitor experience. However, it remains relevant to consider it in relation to some other existing, local attractions on the basis of their most important common goal – to provide a memorable visitor experience. For the same reasons, the study team has visited and evaluated some significant heritage and cultural attractions in Sydney, and also drawn on overseas examples. Due to time constraints, some sites were assessed through a desk top analysis, rather than first-hand experience.

### **METHODOLOGY**

Twelve Tasmanian visitor attractions were forwarded a Questionnaire. (See separate document.) All sites were measured according to the following criteria:

- Visitor numbers per annum
- Entrance fees; price/structure/% of overall revenue
- Merchandising; range by type and price/% of overall revenue
- Food and Beverage; range by type and price/% of overall revenue
- Duration of operation
- Average length of visit
- Access; management of visitors around the site - self-guided, tour-guided, special timed events
- Interpretation
- Innovative practices including the use of technology
- Day/night experiences
- Proximity to key markets, other attractions
- Infrastructure services/signage

Preference was given to those in regional locations; the attractions range in size, visitor numbers, age and values. Responses were received from nine of the twelve businesses.

#### **SURVEY PARTICIPANTS**

- Port Arthur Historic Site Management Authority
- Grubb Shaft Gold and Heritage Museum
- Boag's Brewery
- Woolmers Estate
- Salmon Ponds and the Museum of Trout Fishing
- Tasmanian Wool Centre
- Creative Paper Tasmania
- Mt Field National Park (PWS operations only)
- West Coast Wilderness Railway

# Willow Court ▯ New Norfolk

## Regional Tourist Attractions

### RESULTS OF BENCHMARKING SURVEY APRIL 2006

- None are based on one single experience, but have smaller, and associated, streams to broaden the visitor experience (retail, food and beverage, self guided/guided tours, activities).
- The number of visitors could be strongly linked with the scale of the attraction, and the exposure it receives.
- Visitor numbers range from 15,000 to 300,000 per annum, but are generally around 20-30,000.
- Basic admission prices range from free and gold coin donations to \$25.
- Add-on experiences vary greatly, from self guided walks to cruises, hands-on activities and tours. These range from \$5 to almost \$40 for an adult, usually in addition to basic admission.
- Only a couple stated they offer family passes.
- Group discounts were generally around \$1-3 off adult prices.
- Several are aligned with the Smart Visit Card group, the 'See Tasmania Card'. Some are aligned with local attractions (triple pass, etc) or organisations (National Trust, etc).
- Revenue from Entrance Fees ranges considerably – from 5% to 90%, depending on the experience/product.
- Visitors generally spent between 1-2 hours at the attractions, with ranges from 30 minutes to almost 5 hours.
- Merchandise was generally geared around the scale of the attraction, with virtually all stocking general souvenirs (clothes, jewellery, postcards, wood crafts, local art etc). Some have a wider range than others, depending on the experience/product.
- Merchandise prices range from less than a dollar (perhaps postcards) to \$2000 (perhaps authentic memorabilia). However, most stocked goods up to \$100, with a few items that were more expensive.
- Merchandise contributed anywhere from 2% to 90% of revenue, depending on the experience/product. A retail-based attraction will have a higher merchandise rating than an historic site based on entrance fees.
- Food and Beverage availability ranged from nothing, or just snacks and tea/coffee, to cafes and restaurants. Some offer catering for on-site private functions.
- Revenue from Food and Beverages ranges from zero to 100%\* (\*this is due to the food & beverage and collection of entrance fees operating as separate entities within the business).

- Most of the attractions are relatively young, some up to 25 years old, with a few under 10 years. One attraction is well over 100 years old, but has evolved to its current form over the past 20 years.
- All sites had self-guided/free roaming experiences for visitors, with most adding guided tours (usually extra cost).
- The attractions were all based on a strong local theme, which seems to direct/guide their interpretation. None are based on 'imported' themes. Each included aspects of education, interpretation and local history, to varying degrees.
- Some attractions offer hands-on activities, sometimes with extra charges associated. All offer information about their site/attraction/history albeit to varying degrees.
- Most utilise technology, but few stated they have been innovative in its usage. One site has quite an extensive current, and planned, use of technology to enhance visitor experiences.
- Only one offers night time experiences at their attraction (besides catering, private functions, dining).
- Most are based on or near a touring route, or within an established tourism cluster, or are able to draw on larger population centres or attractions.
- All offer toilet facilities. Other services appear to be dependant on the type of attraction, eg. attractions with larger retail base have EFTPOS/ATM. Several offer booking facilities, as part of Visitor Centre or as part of the TVIN. The facilities/services available also seem linked to the scale of the development.