

# Northern Tasmania

## DESTINATION MANAGEMENT PLAN

June 2022



This report was prepared for Visit Northern Tasmania by TRC Tourism, funded by the Tasmanian Department of State Growth.

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## ACKNOWLEDGEMENT

The Tasmanian tourism industry acknowledges the Tasmanian Aboriginal people and their enduring custodianship of lutruwita / Tasmania. We honour 40,000 years of uninterrupted care, protection and belonging to these islands, before the invasion and colonisation of European settlement. As a tourism industry that welcomes visitors to these lands, we acknowledge our responsibility to represent to our visitors Tasmania's deep and complex history, fully, respectfully and truthfully. We acknowledge the Aboriginal people who continue to care for this country today. We pay our respects to their elders, past and present. We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands. We respectfully ask that tourism be a part of that future.



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# Executive Summary

## Who We Are and Where We Want To Be?

### BRAND TASMANIA

'Tasmanian' is a powerful, uniting brand, owned by Tasmanians and recognised by our audiences locally, nationally, and internationally. The place is Tasmania. The people are Tasmanians. The call to action, is 'Be Tasmanian'. This is who we are, at our best. Tasmanians tell a story of individuals working against impossible odds to quietly pursue the extraordinary. They tell it humbly and understand that "being different" – being Tasmanian – is positive, in a world that feels increasingly beige. And it is all happening in a pristine and wild environment, powered by one hundred percent renewable energy. Tasmania is a place where the uncommon is common. Where you can throw off the shackles and feel everything deeply. It is the antidote to the straitjacket of modern life. Tasmania is no ordinary place and Tasmanians are no ordinary people. It is a place that finds joy in non-conformity and our visitors can discover soul-enriching experiences that are raw, beautiful and honest.

### GUIDING PRINCIPLES - Reflective of UN Sustainable Development Goals

#### Good Health & Wellbeing

Keeping healthy and creating healthy experiences

#### Quality Education

Creating life-long learners across our industry

#### Gender Equality

Everyone is equal in pay, respect and opportunity

#### Affordable & Clean Energy

We create the energy our visitors need

#### Decent Work & Economic Growth

Prosperity for everyone working in our industry

#### Industry Innovation & Infrastructure

We create experiences responsibly that are fit to place

#### Sustainable Cities & Communities

Our community of hosts share our visitors' value of sustainable living

#### Responsible Consumption & Production

We embrace a circular economy way of creating and consuming

#### Climate Action

We are on a journey to being carbon neutral, zero waste

#### Life on the Land

Custodianship of the land we live on is respected

#### Partnerships for the goals

We never go it alone, partnerships are our first preference

### GOALS

- Launceston is recognised as a vibrant city in which to live as well as a gateway and a destination to stay
- The value of the visitor economy to the region and Tasmanian increases through sustainable growth and yield across the region
- Ongoing improvements to and investment into visitor experiences across the region to encourage dispersal
- The social licence for the visitor economy continues to grow, as does the committed skilled workforce
- Improve the sustainability of tourism through implementing practical sustainability actions.

### STRATEGIC PRIORITIES

#### 1. REBUILDING VISITATION

- Destination marketing
- Home grown festivals & events
- Playing to our creative strengths

#### 3. SHAPING OUR FUTURE

- Tasmanian Aboriginal people
- Climate change
- Inclusive tourism

#### 2. SUPPORTING OUR PEOPLE

- Supporting our people – business owners
- Supporting our people – workforce
- Uniquely Tasmanian operators and experiences

#### 4. INVESTING IN OUR FUTURE

- Infrastructure Investment
- Tasmania's natural environment

### NORTHERN TASMANIA VISION

We are a community of hosts, caring for, and sharing our adventures, living history and gastronomic experiences with our visitors.

***We are Northern Tasmania.  
You Will Grow Here.***

### PILLARS

#### PILLAR 1

##### INDULGE IN OUR BOUTIQUE CREATIVE CITY

*A city destination that celebrates and embraces gastronomic and cultural experiences surrounded by the places and people that host our visitors*

#### PILLAR 2

##### CHOOSE YOUR OWN ADVENTURE

*Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places*

#### PILLAR 3

##### EXPLORE OUR LIVING HISTORY

*Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who seek these truths*

#### PILLAR 4

##### BE RECONNECTED

*Be part of a genuine slice of rural Tasmanian life sharing produce and bounty through the people that grow here*







# Introduction

The Tasmanian Government, Local Government Agencies (LGAs), tourism industry and the four Regional Tourism Organisations (RTOs) are united in the development of regional Destination Management Plans (DMPs) for 2022-2025.

The Tourism 21 Visitor Economy Action Plan 2020-2022 (Tourism 21) is the overarching State-wide document developed in collaboration between the Tasmanian State Government and Tourism Industry Council of Tasmania (TICT), setting the goals and priorities for tourism in Tasmania as a pathway to tourism recovery for the state.

Key goals of Tourism 21 are:

- Restore the value of visitor spending in Tasmania to \$2.5 billion by the end of 2022
- Grow the value of tourism to regions by increasing visitor spend
- Generate more jobs for Tasmanians.

Aligned to Tourism 21's intent, the DMPs will reaffirm this foundation point for a future State-wide visitor economy strategy by determining strategic priorities for each region and directing collective investment of effort to achieve these and future State-wide goals.

Tourism 21 was informed by pandemic impacts, previous tourism plans at all levels, as well as aspirations from the initial consultation with stakeholders in 2019 to inform a future Tourism 2030 Strategy. The DMPs respond to these aspirations:

- Grow visitation to Tasmania that is economically, environmentally and socially sustainable
- Grow yield and sustainable visitation numbers
- Grow visitation in Tasmania by Tasmanians including awareness of product on offer
- Putting our regional towns and destinations at the heart of the visitor experience
- Support Tasmanian Aboriginal People in the sharing of their culture and history
- Illustrate responsible stewardship for our protected areas
- Tell the Tasmanian story and celebrate who we are
- Evolve economic, profitable and sustainable businesses
- Foster diversity and the next generation of industry leaders.

The Tasmanian hospitality sector is currently facing a number of significant opportunities and challenges, to which a joined-up and connected industry response is required. The Industry Development Plans prepared by the Tasmanian Hospitality Association (THA) present a holistic and strategic vision to guide this response. They contain a range of possible programs and initiatives to support and shape the industry into the future and relevant elements of these are captured in the DMPs.



COVID-19 travel and other related restrictions have seen significant impacts to Tasmanian visitation, the tourism industry and the broader Tasmanian economy. However, by the year end December 2021, overall visitor numbers had revived to 59% of 2019 levels, and expenditure had bounced back by 87% of 2019 levels.

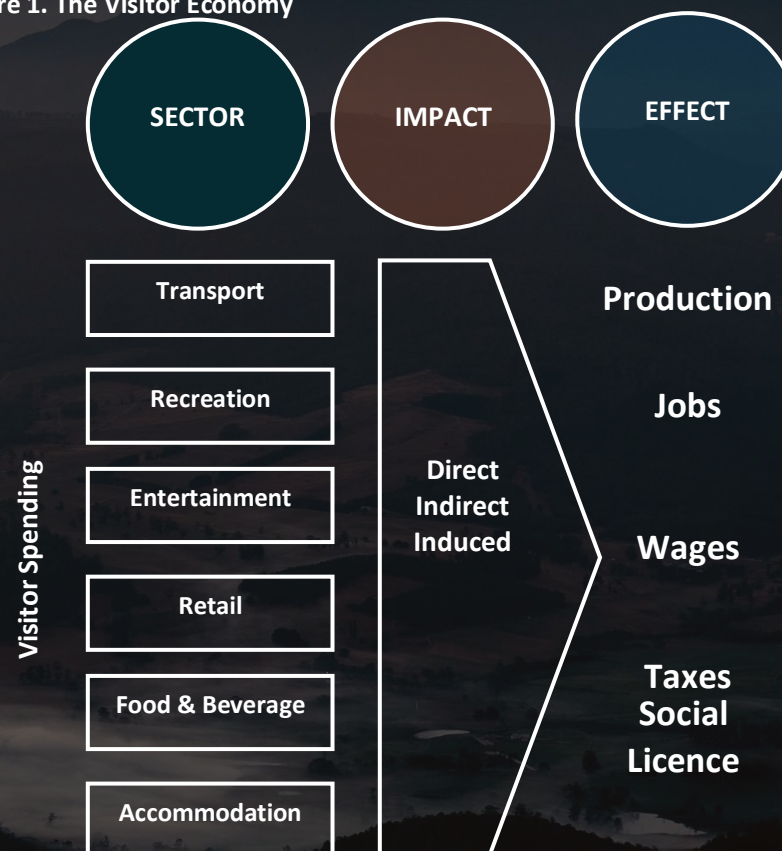
In the absence of International visitors, mainlanders spent \$1.84 billion, in the state in the year end December 2021 compared to 2019. This reflected in the average spend per visitor increasing by 26% to \$2,717 per visit compared to 2019 levels.

Summer/Autumn 2022 (January-May) in Tasmania anecdotally saw a very positive growth in visitation with many businesses citing March through to May as being record months in terms of visitor trade.

The four 2022-2026 Destination Management Plans will provide direction for growth in the visitor economy. The visitor economy is about more than just the tourism sector. It relates to any social or economic value visitors generate in the State including those here for business, education or visiting family and friends. It relates to expenditure on tourism, but also on transport, agriculture, retail, entertainment, car repairs, groceries etc. Any spend within the state has direct and indirect impacts resulting in jobs, wages, taxes, investment and more.

Social value represents the positive impact visitation can have to a community, offset by perceived or actual negative impacts. Positive impacts could include: underpinning financial viability of hospitality and retail services in rural communities, added vibrancy and sustainability to local events, and/or attracting migration of working age families. Negative impacts could include: over-crowding of public places, excess waste and/or pressures upon small community food supply.

Figure 1. The Visitor Economy









## Where we are now

### Northern Tasmania

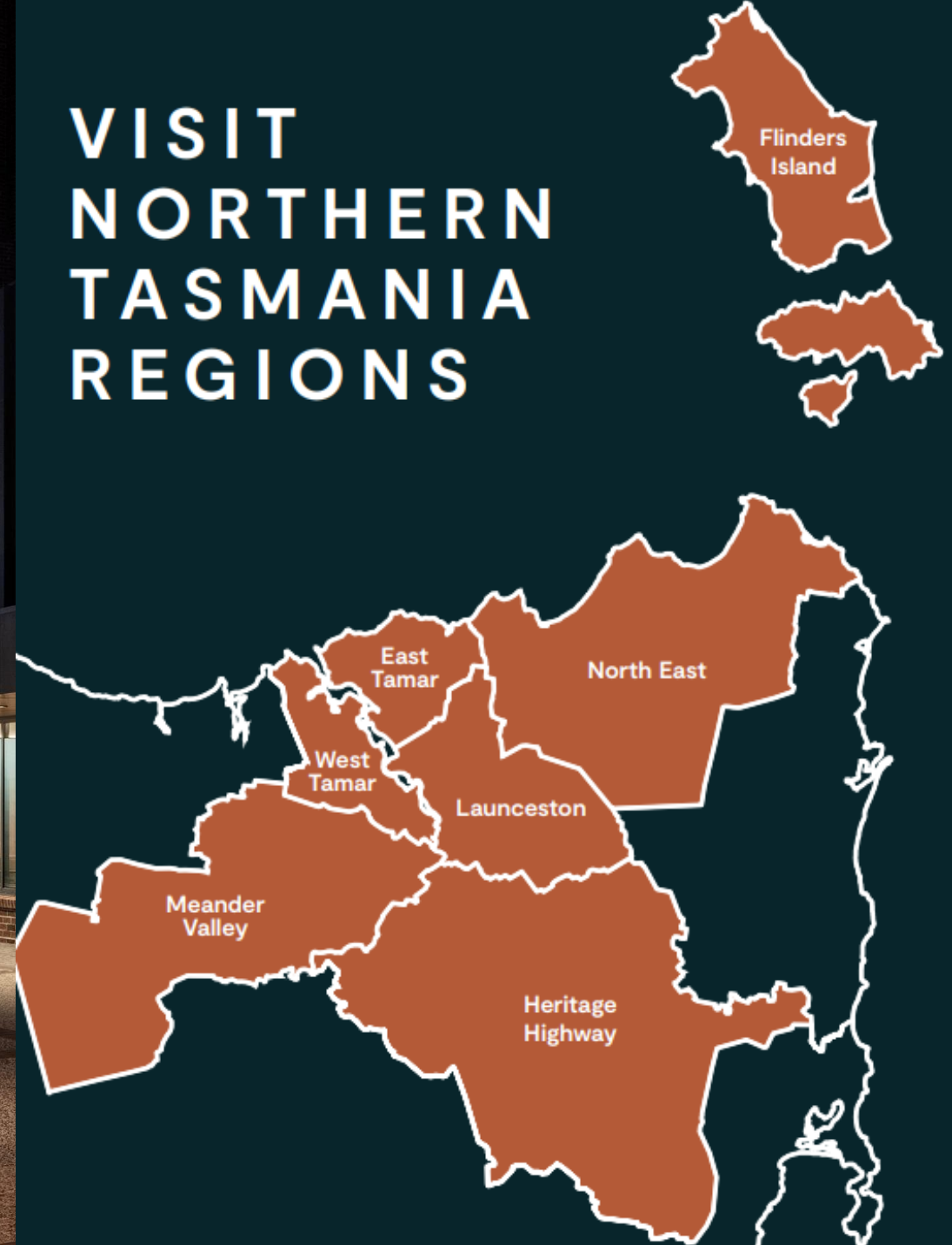
The traditional land and seas of the Palawa Aboriginal people, Northern Tasmania is full of diversity. Tasmanian wilderness stretching from the Great Western Tiers across to the North East, interspersed with rich agricultural lands full of unique offerings such as lavender, truffles, cool climate wines and seafood. Settlement history is strongly preserved across the region, with UNESCO World Heritage listed Convict Sites and stories of early 19th Century life. Adventure abounds across the region, from walks in UNESCO World Heritage listed Tasmanian Wilderness, two of Australia's top public golf courses, world renowned wild brown trout fly-fishing through to globally recognised mountain biking trails. At the heart is Launceston, a boutique vibrant cultural hub, recently certified as a UNESCO Creative City of Gastronomy.

Within the region are seven Local Government Authorities. To the north east of Tasmania lies Flinders Island, a stand-alone nature based destination, and home to a living lab exploration of regenerative tourism.

Location	Population <sup>1</sup>
Meander Valley	19,282
West Tamar	22,718
George Town	6,764
Dorset	6,617
Launceston	65,274
Flinders Island	906

<sup>1</sup> ABS Census data, 2016

## VISIT NORTHERN TASMANIA REGIONS





With Tasmania's second largest city and easy access from Launceston Airport and the Spirit of Tasmania, Northern Tasmania has always been a popular region. The natural areas, heritage sites, golf courses and cellar doors of the Tamar Valley have been popular with leisure travellers, and the recent development of exceptional mountain biking facilities has seen a shift in markets and increasing popularity of the region. Launceston is Tasmania's second most popular arrival destination.

Northern Tasmania welcomed close to 700,000 visitors by year end March 2020 (53% of all visitors to Tasmania), equating to two million visitor nights (19% of all Tasmanian visitor nights) suggesting short stays in the region. Tourism generated an estimated \$533 million annually. Approximately 52% were travelling for holidays, 12% for business and the balance visiting friends and family.<sup>2</sup>

As travel has resumed into Tasmania, occupancy rates in Launceston have recovered. By March 2022 occupancy rates only 4% lower than 2019 levels, and room yields on par (THA Hotel Occupancy report March 2022). The north east region however was the strongest performer of all regions, with five of the seven months of available data showing more nights booked than the same months in 2019, and the summer peak period continuing the strong demand. This demand driven by both mountain bike and golf intra-state visitors remaining high while borders were closed.

Regardless the region still struggles with traditional seasonal fluctuations with only one third of visitors being hosted in Northern Tasmania between the six months of May through until October.

Access to the island state of Tasmania is critical. By the end of 2021, Launceston Airport has secured direct flights to six major cities in Australia; Melbourne, Sydney, Brisbane, Gold Coast, Adelaide and Perth. Spirit of Tasmania provided 25% of total visitation to the State, with a new vessel capacity increase of 40% on schedule to come online in late 2023 or early 2024.

Events play a strong role in attracting visitors to Launceston with potential for growth in this aspect of the destination. One of the best opportunities for sustainable growth and yield lies in converting perceptions of Launceston as a gateway to being seen as a destination and a great place to stay and explore the surrounding region. The recent successful bid to UNESCO to become a City of Gastronomy combined with planned investment in Fermentation Tasmania and a number of heritage sites will contribute to this goal.



<sup>2</sup> Tasmanian Visitor Survey – March 2022



## Current Attractions and Activities



### LAUNCESTON LIFE

Launceston offers the best of both worlds – vibrant urban conveniences intertwined with the region’s natural, culinary, cultural and heritage values. Centred around the magnificent Cataract Gorge, visitors can easily tour at their own pace around the city – on foot, bicycle, boat, tour or chairlift! From harvest markets, leading events and festivals and lovingly restored buildings of old, Launnie captures the true essence of the North, providing a taste of what visitors can expect during their northern journey.



### BLUE DERBY

Located in temperate rainforest in north-east Tasmania, the Blue Derby Mountain Bike Trails encompass some of the most stunning landscapes in the state. The main trail head, located in Derby, provides easy access to cafes, bike hire shops, parking, public toilets, showers and a bike wash facility. The MTB experience offered has firmly placed Derby on the map, now a vibrant tourism hub, attracting mountain bike enthusiasts, friends and family from around the world. The Trails are now globally famous, having hosted World Enduro events in 2017, and 2019.

Complimenting Blue Derby are the recently launched Mt George and Tippogoree Hills mountain bike trails near George Town, offering quality ride experiences just 30 minutes from Launceston city.



### HERITAGE AND CULTURE

Northern Tasmania embraces both the old and new as part of the story of people and place. A range of historical experiences are on offer, with convict built structures and restored heritage buildings providing insights into settlement history, with many being used for new purposes today.

Many convict and settlement stories are shared in villages such as Campbelltown, Ross, Carrick, Clarendon, Georgetown, Legerwood, Low Head Lighthouse and the UNESCO World Heritage listed convict sites of Brickendon and Woolmers Estates. Visitors can learn about the region’s diverse history in many ways - through tree sculptures and wood carvings at heritage homes and restored buildings open to visitors and at the Queen Victoria Museum and Art Gallery. In more modern history are visitors’ experiences such as the Beaconsfield Mine and Museum.

Aboriginal culture and heritage are also rich throughout the region, experiences such as Kooparoona Niara Tours feature stories and experiences showcasing native bush tucker and cultural artworks. However broader awareness and acceptance of aboriginal culture, language and storytelling presents an opportunity for growth.

The talented artisans of the North are celebrated at the annual Tasmanian Craft Fair in Deloraine, an event attracting over 20,000 patrons! For those who don’t make it to the Festival, the region is full of public sculptures and artworks such as the tree carvings and the Great Western Tiers Sculpture Trail. Junction Arts Festival heralds in the spring to Launceston each year, with MONA FOMA celebrating the summer artistically.





### APPROACHABLE ADVENTURE

Northern Tasmania has a range of national parks and reserves, soft and active adventure on offer. The alpine plateau experience of Ben Lomond delivers a range of experiences across the seasons, from soft adventure skiing in winter, to rock climbing, abseiling and hiking at other times of the year. The region is also home to some of the World's best golf courses, flyfishing, ziplining in the Hollybank Reserve, Hot Air Ballooning, and walking through UNESCO World Heritage listed Tasmanian Wilderness to a range of beautiful sites such as Liffey and Meander Falls and the Mole Creek / Marakooa Caves.



### GASTRONOMICAL DELIGHTS

Northern Tasmania is home to unique produce, tasting and purchasing opportunities. From locally made Leatherwood Honey, Lavender ice-cream, tea and a range of merchandise, rhubarb, truffles, famous wines and beers and of course seafood. In addition to farm gate, markets and other food related experiences, Northern Tasmania celebrates all things food and drink through festivals and events – from the Ultimate Truffle Weekend, AgriCULTURED, Tassie Scallop Fiesta, NORTH Festival, Farmgate Festival and Festivale.





## The Next Four Years: Key Drivers, Enablers and Influencers



### ECONOMIC AND SOCIAL DISRUPTION

The global pandemic has resulted in disruption to economics, politics, and our everyday life and will catalyse a new generation of tourism. A Recovering global economy has implications for domestic travellers with discretionary expenditure but limited international destinations, while international visitor growth to Tasmania is expected to remain soft into 2023. Intrastate travel has increased with 'short breaks' and visiting friends and relatives' markets being strong. Interstate markets are also active with short breaks as well as longer self-drive holidays.



### INCREASING COMPETITION FOR DOMESTIC TOURISM

We will see a shift in traditional markets with the volume of international visitors staying low until at least 2023 and for many markets, likely significantly longer. Demand for domestic tourism however will continue to be strong in the next few years. At the same time there will be increasing competition for a greater share of domestic visitors from other regional destinations across Australia. This means Tasmania will need to offer experiences so powerful they compel visitors to choose the state over other destinations.



### GENERATIONAL SHIFTS

Generation Y now make up most of the workforce and the family market as Baby Boomers retire. Gen Z are now entering the workforce and have different values and preferences than those who came before. Social connection and conscious consumerism will generate demand for sustainable practices, carbon positive products and experiences. They will be seeking experiences that are meaningful and purposeful, where accessibility and equality for all is paramount. This will require the tourism sector to demonstrate their commitment to sustainability as both destinations as well as employers.



### ENVIRONMENTAL SUSTAINABILITY

As global warming continues to overwhelm the world, there is an imperative to encourage residents to be more mindful of the environment and make planet-friendly lifestyle choices. Around the world this expectation is also extending to the tourism sector. Travellers are also making conscious decisions about responsible travel. Tasmania, although working from an enviable base of renewable energy generation, will still need to focus on measures to reduce carbon emissions and other forms of waste if it is to successfully position itself on the global stage as a credible sustainable destination.



### SOCIAL LICENCE FOR TOURISM

How residents feel about tourism is increasingly important and will determine a destination's success in the long term. Community sentiment is guiding tourism planning and development, and there is a growing expectation that tourism will generate positive social, environmental, and economic benefits for the host communities. Workforce attraction, and skills development is a part of the social licence question as people make conscious, values based choices as to which industry they work in.



### EXPERIENTIAL AND LOCAL

The cultural economy has continued to develop in recent years, producing a further shift away from the patronage and subsidy of high culture, towards support for the creative industries fuelling the emergence of co-created culture. Travellers are seeking immersive experiences anchored in local culture. Cultural and creative elements of destinations are becoming increasingly embedded in tourism products that reflect everyday life as in the case of 'live like a local' experiences, offered by creative destinations such as Copenhagen.



## Strengths, Weaknesses, Opportunities & Threat

### S

#### STRENGTHS

- Extent of heritage properties across the region
- Creative arts and settings – theatre, museums, festivals
- Flinders Island as an emerging regenerative tourism destination
- Diversity of walking experiences
- Globally recognised mountain bike trail destination, Blue Derby
- World class fly fishing
- x2 of the top five public Australian golf courses; Barnbougle Dunes and Lost Farm
- Accessibility from Spirit of Tasmania, Launceston Airport
- Winter snow sports for Tasmanians
- Gastronomy including world class wines, beverages and food produce
- Coastlines and national parks
- Agriculture and agritourism experiences
- The connectedness of the community and the land
- Event venues of a broad range of specifications
- x3 UNESCO Certifications for wilderness, convict heritage and gastronomy.

### W

#### WEAKNESSES

- Perceptions as a gateway rather than a destination
- Limited range of accessible tourism experiences/services
- Safety perceptions of Launceston city at night
- Lack of staff and commitment to hospitality
- Lack of access/permeability of Tamar estuary
- Customer service/opening hours
- Local community awareness of visitor economy opportunities
- Family friendly offerings
- Public transport
- Low awareness of Launceston Airport by Australian travelling public
- Low levels of education in community and industry regarding aboriginal culture and language.



## O

## OPPORTUNITIES

- Launceston certified as a UNESCO Creative City of Gastronomy
- Fermentation Tasmania
- Ben Lomond as a winter and summer destination - improvements
- Active outdoor and night time settings in the city centre
- Greater activation of heritage assets (e.g. Reassign Heritage Interpretation initiative, connecting Drive Journeys with stories to historic villages/places)
- Aboriginal culture and language education of industry
- Master planning and further connection with Cataract Gorge
- Cool season events attraction and leveraging of existing major events
- Improved cross government / industry co-operation & communication
- Event hosting expanded through investing in UTAS Stadium, QVMAG Institute and a major business events venue
- Targeting family travel market
- Technological investment (e.g. augmented reality overlay/self-guided tours)
- Growth in activities sought pre and post event attendance
- New positioning and markets derived from Flinders Island's regenerative tourism pilot program.

## T

## THREATS

- Continued uncertainty in visitor economy generated by unrest born of global events
- Competition from other destinations close to source markets
- Loss of market share
- Continued workforce capacity issues
- Lack of collaboration, leadership and investment
- Climate change induced events such as increased bush fires and floods
- Loss of inbound travel options through airline frequency/capacity changes and/or delays in new Spirit of Tasmania vessels launching
- Continued global disruption to the Tasmanian and interstate markets.







### <sup>3</sup>How do we get there?



\* Strategic priorities will be subject to change by late 2022 as part of renewed 10 year State strategy development.



## Our Positioning and Hero Experiences

### Brand – Northern Tasmanian

*“At our heart is a charming city of character in a region full of characters offering an eclectic collection of boutique experiences. It’s a culture where conservative contradicts offbeat. You’re made to feel special here, where you don’t just savour the end product; you’re given the freedom to live part of its story, to understand what you’re consuming and why it is how it is.”*

The Northern Tasmanian brand has been designed around the concept of ‘finding your bearings’ – finding direction in your life or finding your ‘True North’. Referencing a compass pointing North, locating your True North can make a person feel as though they are more centred – that they know which direction to go in. It allows you to get your bearings, find your place and choose your way. Complementing the ‘Come Down for Air’ and ‘Tasmanian’ identities, The North is a place to grow and prosper.

### Visit Northern Tasmania can build on the current positioning to:

- Be recognised as a hub in which to stay in a quality accommodation offering, play and choose your own adventure in the surrounding area
- Lead Tasmania in our commitment to community and connecting visitors with people and place, including an ambassador/host program to engage locals in welcoming visitors and providing information services.
- Strengthen the experience Launceston offers and the ‘boutique creative city’ feel through the UNESCO Creative City for Gastronomy certification. Includes new city infrastructure and building on the emerging café, restaurant and brewery vibe with a focus on signature food and beverage experiences that present contemporary Tasmanian cuisine...Australia’s leading regional gastronomic destination.
- Being known for innovation in agritourism and the experiences that can be delivered in the visitor economy through investment in Fermentation Tasmania as a significant attraction as well as delivering extensive social and economic outcomes.
- Work with wineries and cellar doors to build on the existing experiences and encourage further visitor engagement with growers, winemakers etc in ways that can encourage regeneration.
- Grow events that celebrate the regional strengths including its gastronomy, and agricultural, historic, and natural places.
- Learn from the regenerative tourism ‘living lab’ on Flinders Island how community centric visitor hosting can establish a compelling nature-based destination appeal.
- Activate our heritage places and encourage visitors to understand the history of the region including working with the local Aboriginal community to enable them to share their stories.
- Continue to grow and support the development of mountain biking in north east Tasmania and other trail destinations to maintain the mantle of Australia’s premier mountain bike destination.
- Strengthen awareness of the world class fly fishing and golf the region offers and the proximity of these and other nature-based adventures to the city.
- Grow the opportunities for a range of sporting and cultural events through building and utilising excellent facilities and venues.





The Australian Government<sup>4</sup> notes that:

“*For sustainable growth, destinations will need a collaborative 7-point plan.... that comprises a compelling anchor attraction, a supporting ecosystem of activities, seamless physical and digital access, options for high-end accommodation, strong promotion, a strong social licence to operate and dedicated management of resilience and sustainability risks. Activities may be selected from the growing trends for authentic, adventure, cultural, indigenous, luxury, digital and eco-tourism experiences.*”

For Tasmania's North, that anchor attraction has to be a thriving and vibrant Launceston with its gastronomic and creative heart as the hub for this diverse region. This is complemented by the strong satellite destinations including MTB, cycling, walking, golf and fly fishing as well as the wineries and distilleries, and major heritage sites and bespoke agritourism experiences the region possesses.

<sup>4</sup> Opportunities for the Visitor Economy A modern, diversified and collaborative path to 2030, June 2021



## Northern Positioning Pillars Overview

The following four positioning pillars were developed through the consultation process.

Each one has the potential to enable the realisation of the vision, positioning and therefore community and stakeholder aspirations. While these pillars offer an area of strength for the destination, they ensure that there is a diverse experiential offering in the region that will appeal to new and existing target markets.

PILLAR 1	PILLAR 2	PILLAR 3	PILLAR 4
INDULGE IN OUR BOUTIQUE CREATIVE CITY	CHOOSE YOUR OWN ADVENTURE	EXPLORE OUR LIVING HISTORY	BE RECONNECTED
<i>A city destination that celebrates and embraces gastronomic and cultural experiences surrounded by the places and people that host our visitors.</i>	<i>Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places.</i>	<i>Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who own these truths.</i>	<i>Be part of a genuine slice of rural Tasmanian life sharing produce and bounty through the people that grow here.</i>

## Our Catalyst Projects and supporting experiences

**Catalyst projects** are exceptional experiences (whether existing or aspirational) that (will):

- Provide the destination with a real competitive advantage over other destinations
- Focus on what is truly unique, memorable or engaging about a destination
- Meet the needs of the identified target markets
- Be in tune with the host community and be truly sustainable.

**Support experiences** are those experiences that are important across the region, either to strengthen the overall visitor experience or for the local community.





## PILLAR 1

### INDULGE IN OUR BOUTIQUE CREATIVE CITY

*A city destination that celebrates and embraces gastronomic and cultural experiences surrounded by the places and people that host our visitors*

### CATALYST PROJECTS

- **Launceston UNESCO Creative City of Gastronomy.** Going beyond marketing this certification to visitors by evolving northern food systems, community food literacy, and agritourism expansion.
- **UTAS Stadium / QVMAG Institute / Business events Venue.** Investing in venues and facilities to attract, host and leverage sporting, cultural and business events - making Launceston an event destination of choice.
- **FermentTasmania.** Building and operating a center of excellence in fermentation research and education underpinning the region's gastronomic credentials, by evolving food experiences.
- **City Heart Initiatives.** Investing in and activating infrastructural changes to the central city that decongest, green and provide a heightened sense of safety and appeal to enhance both day and night time visitor economies.
- **Tamar River foreshore initiatives.** As the health of the river system is enhanced through three layers of government support, ensuring the engagement with the waterways via foreshore developments are supported, e.g. Cataract Gorge master-planning and Kings Wharf Board-walk initiative.

### SUPPORT EXPERIENCES

- Range of accommodation choices
- Northern Forage Drive Journey
- Events calendar diversity
- Central Launceston Marketing
- Cruise ship visits to Beauty Point
- Cool Season Events Strategy.





## PILLAR 2

### CHOOSE YOUR OWN ADVENTURE

*Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places*

### CATALYST PROJECTS

- **Short Walk Capital Kooparoona Niara.** Positioning and enhancing the Meander Valley community's passion for walking as a major visitor destination appeal.
- **George Town Wild Tamar destination development.** Attracting and developing soft adventure experiences in and around the George Town area - based upon their natural place advantages.
- **Ben Lomond year-round adventure mountain.** Future-proofing Northern Tasmania's own boutique ski mountain by becoming a year-round adventure playground including rock-climbing, riding, walking and snow play.
- **Blue Derby International MTB Destination.** Building upon the world acclaim earned by Blue Derby as a MTB destination. Protecting this precinct for the purposes of growing community prosperity through riding, MTB event hosting and associated visitor experiences.

### SUPPORT EXPERIENCES

- Hollybank Adventures
- Barnbogle Golf
- World class fly fishing
- Multi-day walking experiences
- Nature based event hosting and leveraging.





## PILLAR 3

### EXPLORE OUR LIVING HISTORY

*Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who seek these truths*

### CATALYST PROJECTS

- **REASSIGN Heritage Interpretation Project (Northern Midlands).** Advancing heritage interpretation of UNESCO World Heritage Convict sites, towns and landscapes through compelling storytelling and intuitive technology use.
- **Aboriginal culture and language education program.** On mutual terms with local Aboriginal community elders, advance a program of cultural education and awareness acknowledging historical harm and building trust through language use and shared storytelling.
- **Launceston Streetscape visitor interpretation.** Through the City Heart program bring to life the history of the city by celebrating the heritage streetscapes through contemporary interpretation, technology and event activations.
- **Tamar Valley Histories.** Positioning and celebrating the shared mining, maritime, convict and aboriginal histories through storytelling at key heritage sites and locations of significance.

### SUPPORT EXPERIENCES

- Heartlands Drive Journey
- Regional arts and cultural events
- Aboriginal experiences and learning
- Walking tours
- Rural heritage-scape preservation.





## PILLAR 4

### BE RECONNECTED

*Be part of a genuine slice of rural  
Tasmanian life sharing produce and bounty  
through the people that grow here*

#### CATALYST PROJECTS

- **Agritourism Accelerator.** Inviting more agribusinesses to participate in the visitor economy while celebrating and growing existing agritourism experiences.
- **Major Sporting, Cultural and Community events.** Creating new, supporting existing and hosting annual major events that invite visitors to connect with community through shared pursuits.
- **Flinders Island Way – regenerative tourism.** Co-designing the future of tourism with and for the community using regenerative tourism principles.
- **Launceston city day/night time visitor economy.** Through decongested, green streetscapes that are interpreted through compelling storytelling, connect visitors with our past and present.

#### SUPPORT EXPERIENCES

- Markets, craft fairs and festivals
- Boutique and major food / wine experiences and events
- Cool Season Events Strategy
- Agritourism 'meet the maker' experiences
- Reinventing workforce attraction and participation
- Renewing local tourism planning as community lead.



## Our Goals

- Launceston is recognised as a vibrant city in which to live, a gateway and a destination to stay
- The value of the visitor economy to the region and Tasmanian increases through responsible and sustainable growth and yield across the region
- Ongoing improvements to and investment into visitor experiences across the region to encourage dispersal
- The social licence for the visitor economy continues to grow, as does the committed skilled workforce
- Improve the sustainability of tourism through implementing practical sustainability actions.

## Tourism 21 Visitor Economy Action Plan Priorities

Our priorities are aligned with the priorities of T21 and focused on encouraging longer stay, making Launceston a destination as well as a gateway, increased yield and repeat visitation. Each priority has a supporting set of actions.

### STRATEGIC PRIORITIES

1

#### STRATEGIC PRIORITY 1

##### Rebuilding Visitation

- Destination marketing
- Tasmania's natural environment
- Home grown festivals & events
- Uniquely Tasmanian operators and experiences
- Playing to our creative strengths.

2

#### STRATEGIC PRIORITY 2

##### Restore Access

- Air Access
- Spirit of Tasmania
- Cruise.

3

#### STRATEGIC PRIORITY 3

##### Supporting our People

- Supporting our people – business owners
- Supporting our people – workforce.

4

#### STRATEGIC PRIORITY 4

##### Shaping our Future

- Tasmanian Aboriginal people
- Climate change
- Inclusive tourism
- A tourism network for the future.





# Appendices



## APPENDIX A – Australian Travel

Pent up travel demand from domestic visitors is already seeing ▲ across Australia.

Based on results from the first quarter, it is estimated that nationally overnight trips ▲ 113 million by the end of 2021, which is only 4 million short of pre-COVID levels. Based on this trajectory, which factors in ongoing demand, government response, travel restrictions and consumer confidence, forecast domestic overnight trips ▲ 134 million by 2023, ▲ 14% increase on 2019 levels. 85% of Australians now feel it is safe to travel domestically.

While international travel is not expected to recover to pre-COVID levels until at least 2023, current projections based on demand indicate an international travel arrival boom ▲ 7% higher than 2019 levels.<sup>5</sup>

Over 70% of Australians have no plans to travel internationally for a while.

Intrastate visitation across Australia is at an all-time high, with January 2021 recording national intrastate visitor numbers ▲ 3% to 7.7 million compared with January 2020 and expenditure ▲ 17% to \$5.3 billion. February 2021 also recorded year on year ▲ 2% to 5.3 million. Strong demand for: Nature and outdoors; Road trips; Regional experiences

Domestic leisure visitors expect to spend approximately 5 nights away from home on their next trip.

Intrastate visitation for Tasmania also reached record levels ▲ 1.68 million trips for year-end March 2021 (▲ 11% year on year) and expenditure ▲ 36% to \$694 million.<sup>6</sup> Average per person overnight spend also increased to This continued into February 2021 with \$412 ▲ 23% year on year.<sup>7</sup>

<sup>5</sup> 2021 Tourism and Hotel Market Outlook, Deloitte Access Economics

<sup>6</sup> Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021

<sup>7</sup> Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021



## APPENDIX B – NORTHERN TASMANIA TOURISM

### NORTHERN TASMANIA

#### TOTAL VISITORS

 **699,000**  
(53% of all visitors to Tas)

#### TOTAL VISITOR NIGHTS

 **2 million**  
(19% of total TAS visitor nights)

#### TRAVEL PARTY



- Adult Couple no kids 38.6%
- Family with older children 22.2%
- Single 13.9%
- Family young children 11.9%

#### TOTAL EXPENDITURE


 **\$533 million**  
Total indirect / direct tourism value (Tourism Research Australia 2018-19)

#### ACCOMMODATION



- Hotel - 51.8%
- Friends / relatives - 25.8%
- Guesthouse / B&B 25%

#### FROM WHERE?



- 34.6% VIC
- 22.7% NSW
- 15% QLD

#### TRAVEL PURPOSE



- 56.3% Holiday
- 22.4% Visit friends / relatives
- 17% Business

#### AGE



- 65+ yrs 20.2%
- 55-64 yrs 22.2%
- 45-54 yrs 19.1%
- 35-44 yrs 13.9%
- 25-34 yrs 17.4%
- Under 25 yrs 7.1%

#### TOP NORTHERN TASMANIA VISITOR ACTIVITIES

##### BUSHWALKING



- 55.5% of all East Coast visitors
- 45.2% undertake a walk of less than 4 hours duration

##### VISIT NATIONAL PARKS



- 48.1% of all East Coast visitors

##### HISTORIC SITES / ATTRACTIONS



- 46.7% of all East Coast visitors

#### MARKETS



- 37.4% of all East Coast visitors

SOURCE: TVS Analyser March 2020  
Tourism Research Australia Regional Tourism Satellite Account, Northern Tasmania 18-19

### TASMANIAN INTERNATIONAL VISITATION

**Total international visitors to Tasmania:**  
254,000 (approx. 19.5% of all Tasmanian visitors)

**Purpose:** 79% holiday

#### Main markets:

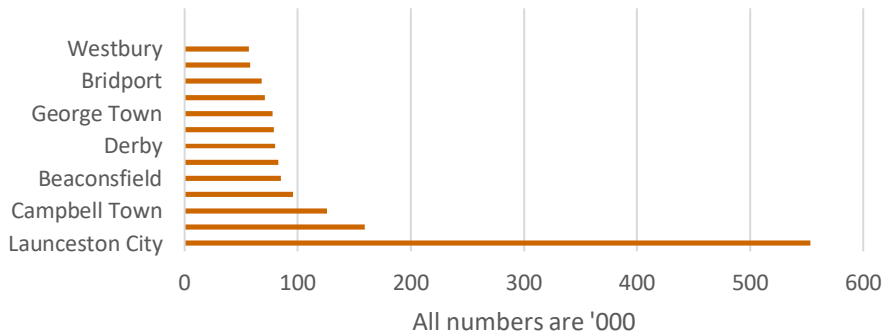
- USA – 15%
- China – 13%
- UK – 10%
- Hong Kong – 10%
- NZ – 7%

Year end March 2020 (pre-international travel restrictions)



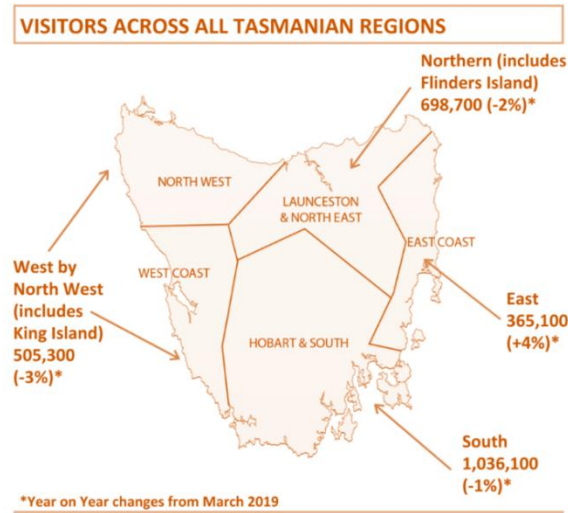
Visited

Figure 1. Places visited East Coast Tasmania<sup>8</sup>



Regional visitation

Figure 2. Annual regional visitor numbers for year end March 2020<sup>9</sup>



<sup>8</sup> Tasmanian Visitor Data, TVS Analyser March 2020

<sup>9</sup> Tasmanian Visitor Data, TVS Analyser March 2020

How Northern Tasmania compares

Hobart and surrounds tops the list as Tasmania’s most visited destination. This is followed by Launceston as Tasmania’s northern arrival city and Devonport with the Spirit of Tasmania ferry arrivals (11% of all arrivals).<sup>10</sup>

TOP 10 PLACES VISITED IN TASMANIA BY VISITOR NUMBERS		
1	Hobart City (Destination Southern Tasmania)	943,000
2	Launceston City (Visit Northern Tasmania)	553,000
3	Devonport (West by North West)	303,000
4	Richmond (Destination Southern Tasmania)	261,000
5	Port Arthur / Tasman Peninsula (Destination Southern Tasmania)	247,000
6	Sorell (Destination Southern Tasmania)	236,000
7	Cradle Mountain (North by North West)	210,000
8	Coles Bay (East Coast Tasmania Tourism)	202,000
9	Bicheno (East Coast Tasmania Tourism)	192,000
10	Swansea (East Coast Tasmania Tourism)	173,000

<sup>10</sup> Tasmanian Visitor Data, TVS Analyser March 2020



## APPENDIX C – Tourism Roles and Responsibilities

### ORGANISATION | ROLES & RESPONSIBILITIES

#### DEPARTMENT OF STATE GROWTH, TASMANIAN GOVERNMENT

##### About

The department consists of five Divisions that work together – Business Services, Cultural and Tourism Development, Industry and Business Development, Renewables Tasmania and the Transport Services Group. The collaboration of Divisions works across industry and services that include investment attraction, transport, infrastructure, cultural industry and tourism supply development, trade, international relations, innovation, energy, resources and region and sector development.

##### Role

The Department's role is to drive economic growth and support the community, industry and business in the creation of jobs and opportunities for Tasmanians.

##### Responsibilities

Within the Department, the Cultural and Tourism Development Division develops policy and programs to deliver economic and social outcomes through the cultural and creative sectors, which include:

- Arts Tasmania
- Events Tasmania
- Screen Tasmania
- Tasmanian Museum and Art Gallery
- Tourism & Hospitality supply side unit

The Tourism and Hospitality Supply-side Unit (THSU) has a primary focus on supporting the Tasmanian tourism industry's capability, capacity and community to deliver great visitor experiences.

The THSU works together with Tourism Tasmania, playing an integral part in the delivery of the T21 Visitor Economy Action Plan 2020-2022, including the co-delivery of the Tasmanian Drive Journeys and Agri-tourism Strategy.

The Department works together with the Regional Tourism Organisations, industry associations, tourism businesses and the Tasmanian Visitor Information Network on identifying and delivering goals in line with T21.



## ORGANISATION | ROLES & RESPONSIBILITIES

### TOURISM TASMANIA

#### About

Tourism Tasmania is the Tasmanian Government's tourism marketing agency.

#### Role

The agency's role is to create demand for travel to Tasmania by connecting people culturally and emotionally to the state through domestic and international marketing programs that activate the Tasmanian tourism brand.

#### Responsibilities

- Marketing partnerships with domestic and international carriers, travel retailers and brand partners
- Working with stakeholders - Tourism Tasmania is the lead agency in achieving the government and tourism industry's shared T21 Tasmanian Visitor Economy Strategy. The agency works together with the Department of State Growth and other government and non-government stakeholders responsible for ensuring the growth of Tasmania's visitor economy is matched with adequate air and sea access, new tourism experiences, accommodation and infrastructure, and a suitably skilled workforce.
- Regional tourism - Tourism Tasmania supports the state's four regional tourism organisations, encouraging a strong regional tourism sector capable of undertaking industry development, capacity-building and tourism marketing programs for their region.
- Travel information - Travel information for visitors is available on Tourism Tasmania's official travel website [www.discovertasmania.com.au](http://www.discovertasmania.com.au).

## ORGANISATION | ROLES & RESPONSIBILITIES

### NORTHERN TASMANIA

#### About

Visit Northern Tasmania (VNT) is the regional tourism organisation for Northern Tasmania. An Incorporated industry-led Association governed by a voluntary skills-based board of Directors and funded by participating councils and Tourism Tasmania. Incorporates the Councils of Meander Valley, West Tamar, George Town, Dorset, Launceston, Flinders and Northern Midlands.

#### Role

Manage and lead the visitor destinations of Northern Tasmania in such a way that stimulates improved economic, social and environmental returns from the visitor economy. Drive development of tourism and the visitor economy by leading a contemporary strategic approach to destination management. Structure takes into account local and regional needs specific to Northern Tasmania and addresses the following objectives:

- To recognise the importance of tourism as a key economic generator for the North
- To ensure that the destination becomes more competitive and attains deserved market share
- To provide a united approach in destination management planning.

#### Responsibilities

- Destination marketing
- Investment attraction
- Product development
- Industry skills development
- Advocacy on behalf of the industry.



## ORGANISATION | ROLES & RESPONSIBILITIES

### WEST BY NORTHWEST

#### About

West by North West is the regional tourism organisation spanning Tasmania's West Coast, North west Coast and King Island and comprises of nine local councils: West Coast, Circular Head, King Island, Waratah-Wynyard, Burnie City, Central Coast, Devonport City, Latrobe and Kentish Councils.

#### Role

Set the strategic direction for tourism in the region, identify priorities and deliver programs that engage industry and stakeholders. Effectively develop and market the region and be accountable to industry and key stakeholders.

#### Responsibilities

- Advocacy - Provide a voice for the region's tourism industry, publicly representing interests and common goals within government & community.
- Industry development - Facilitate a cohesive, collaborative & engaged tourism industry across the region, through strong communication, support, events & leadership.
- Product development - Support & enable the development of new products and/or innovation and reinvestment in exiting products.
- Marketing and events - Help drive visitor demand via Visit Cradle Coast digital assets, by assisting local tourism groups, councils & operators and through strategic partnership with Tourism Tasmania.







## ORGANISATION | ROLES & RESPONSIBILITIES

### TOURISM INDUSTRY COUNCIL TASMANIA (TICT)

#### About

Tourism Industry Council Tasmania (TICT) is the peak body representing the Tasmanian tourism industry. The not-for-profit organisation brings the Tasmanian tourism industry together through its large, representative and voluntary Industry Council.

#### Role

TICT's role is to:

- To represent the Tasmanian tourism industry with a strong and united voice.
- To advocate outcomes that benefit our operators, the broader visitor economy and the Tasmanian community.

Working with the tourism industry, partners and stakeholders, TICT facilitates:

- World class visitor experiences
- Sustainable growth and profitability for tourism operators; and
- A buoyant Tasmanian visitor economy.

#### Responsibilities

- Tasmanian tourism industry leadership:
  - Advocacy, policy and procedures
  - Governance structure
  - Active media presence, engagement with operators, stakeholders and the broader community in priorities and initiatives
  - Initiate projects, research activities and events that stimulate industry, future growth and development of the Tasmanian tourism industry and visitor economy.
- Foster successful partnerships with industry, government and the community including:
  - Collaboration with organisations working within the tourism industry on shared policy and priorities
  - Engaging with industry bodies and organisations contributing to the visitor economy. Pursue opportunities to further engage with the Tasmanian community in opportunities to grow the tourism industry and visitor economy.
  - Working with Tasmanian Government partners to progress T21 priorities.
- Service delivery including:
  - Australian Tourism Accreditation Program, Star Ratings and Tasmanian Tourism Awards
  - Industry events including the annual Tasmanian Tourism Conference and engagement with businesses and organisations in TICT programs and events
  - Pursue new services that align with core program and add-value to operators.
  - Work with Australian Tourism Industry Council colleagues to ensure quality tourism programs remain contemporary to tourism operators and the visitor market.
  - Foster mutually beneficial partnerships with commercial partners committed to the tourism industry.



## ORGANISATION | ROLES & RESPONSIBILITIES

### TOURISM VISITOR INFORMATION NETWORK

#### About

The Tasmanian Visitor Information Network Inc. (TVIN) is a network of Visitor Information Centres strategically located throughout Tasmania who provide a quality service for visitors. Identified by the nationally accredited blue/yellow 'i' logo, centres are generally not-for-profit and funded through membership fees and other government grant funding.

#### Role

TVIN accredited visitor centres, operating under national guidelines and identified by the blue sign with the yellow *i*, offer high levels of personalised customer service including itinerary planning and a state-wide booking service.

#### Responsibilities

For visitors, the TVIN provide:

- Free information and itinerary planning
- Maps and directional information
- Information and booking services for accommodation and tours state-wide
- Information on attractions, events, retail outlets and local services
- Information on road conditions and transport options
- Unbiased local knowledge.

Strategically for members and the tourism industry, the TVIN is represented by a Management Group made up of Board members from across each of the four destinations. An Executive Officer is employed by the TVIN and accountable to the Management Group. The Group is responsible for:

- Addressing visitor servicing issues of state-wide significance
- Reviewing membership applications
- Monitoring ongoing compliance with the Accreditation Guidelines
- Developing an annual budget, business plan and funding applications on behalf of the Network
- Conducting an annual Conference.
- Individual Centres are responsible for developing their own business plans and operating structures.

Current Visitor Centre Network locations:

- North by North West – Strahan, Wynyard, Burnie, Ulverstone, Devonport and Sheffield.
- Northern Tasmania – George Town, Launceston, Tamar – Exeter and Great Western Tiers
- East Coast Tasmania – St Helens
- Southern Tasmania – Hobart
- A map showing locations of the current Tasmanian Visitor Information Network can be viewed at Appendix A.





## ORGANISATION | ROLES & RESPONSIBILITIES

### TASMANIAN PARKS AND WILDLIFE

#### About

The Tasmania Parks and Wildlife Service (PWS) was established in 1971 to present, protect and manage Tasmania's extraordinary landscapes in partnership with the community. The PWS is a division of the Department of Primary Industries, Parks, Water and Environment.

#### Role

The role of the PWS is to manage 49 per cent of the land area of Tasmania which includes three World Heritage sites, 19 national parks and over 800 reserves (including Crown lands) covering 2.9 million hectares of land and water. We are also responsible for the future potential production forest (FPPF) lands comprising 412,000 hectares.

#### Responsibilities

- Present, protect and manage landscapes in partnership with the community including Tasmanian Aboriginal people and their connection to country.
- Partner with other government divisions on shared corporate priorities to manage the State's natural, Aboriginal and historic heritage, to grow and protect primary industries, to regulate land, water and the environment and to manage threatened species and wildlife.
- Partner with statutory bodies such as the National Parks and Wildlife Advisory Council to ensure the PWS approach is aligned with community expectations and all levels of government. Partner with other organisations such as Wildcare Inc, one of Tasmania's largest and fastest growing volunteer organisations, to deliver an extraordinary program of volunteer time and effort.
- Balancing State Government and PWS priorities with cultural, personal, economic, recreation, natural, visitor and tourism benefits.



## APPENDIX D – Tasmania Target Markets

Detailed descriptions of the Tourism Tasmania expanded market segmentation<sup>11</sup>

	RAW URBANITES – NURTURING SENSITIVE, HONEST AND REAL.	ERUDITES – KNOWLEDGEABLE AND CULTURED, CLEAR AND COMPOSED.
<b>HOLIDAY HABITS</b>	More likely to take a longer holiday, and as a result spend more. Seeking down days as well as fun things to do, completely turn off, happy to be (mostly) disconnected. Anxiety high in planning stages of journey.	Pre-planners, squeezing in as much activity as they can. High yielding and become destination advocates. More inclined to share their travels on social media. Fear of missing out so seek information before and during holiday.
<b>PREDISPOSITION TO TRAVEL</b>	More likely to ‘go off the beaten track’. They often have too much annual leave or suffering work stress so may be prompted to take holidays by their workplace. Longer period between returning and starting to dream for the next holiday.	Less inclined to disperse; they are ‘pulled’ to destinations by product innovations and events, and will actively engage with the destination when there. Very little gap between returning and starting to dream about the next holiday. Trigger to Travel is the pull of exploring and destination.
<b>AGE*</b>	Spread across spectrum, however skew older 50+ age group	Spread across the spectrum, no skews.
<b>LOCATION</b>	More likely NSW and Vic than other states. Predominantly metro, through RU are more likely than Erudites to live outside Sydney and Melbourne.	More heavily metro-based than RU, and more likely to be in Sydney or Melbourne.
<b>LIFE STAGE *</b>	Any life stage, but skew to empty nesters (30% and slightly skew to older families.	Any life stage, slightly over indexing as empty nesters or single.
<b>SPENDING HABITS</b>	Earn marginally less than Erudites, but they are willing to spend a longer time on holidays, to relax and reconnect with their loved ones.	Not afraid to ‘Splash out’ and like a little luxury in their travel.
<b>WHAT THEY SEEK AND WHY THEY TRAVEL</b>	Interactions that are engaged, honest, pure and real, without cynicism or hidden agenda. Their communal nature seeks an outward connection with others, as well as the natural environment. The counter structure to the hectic, busy daily lives they lead is serious inner peace and finding themselves through being away from materialism, and unnecessary technology. Seek opportunities to switch off, refresh and rejuvenate through nature and rebuild connections. They need ‘mindful moments’ in holidays which allow them to be present, in order to return to everyday life refreshed.	Holidays for Erudites are about switching on rather than switching off. Unique experiences with rich culture, deep heritage, innovation and intrigue. Their self-contained nature seeks enrichment through reflection, discovery, contemplation and self-expression. The acquisition of Knowledge and need to be a cultural pioneer is central to their travel motivations, and expressing themselves in paramount.
<b>EXPERIENCES THEY VALUE</b>	Seek moments of peace, connection, inspiration and captivation. Types of experiences they value (in order of importance) are: <ol style="list-style-type: none"> <li>1. Natural experiences</li> <li>2. Australian product</li> <li>3. Return to basics</li> <li>4. Local immersion</li> </ol>	Seek stimulation and enrichment. Types of experiences they value (in order of importance) are: <ol style="list-style-type: none"> <li>1. Cultural immersion</li> <li>2. Gourmet dining</li> <li>3. Natural experiences</li> <li>4. Australian product</li> </ol>

<sup>11</sup> Reimagining Our Regions’, Tourism Tasmania 2020



