



# Southern Tasmania Destination Management Plan

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2022—2025



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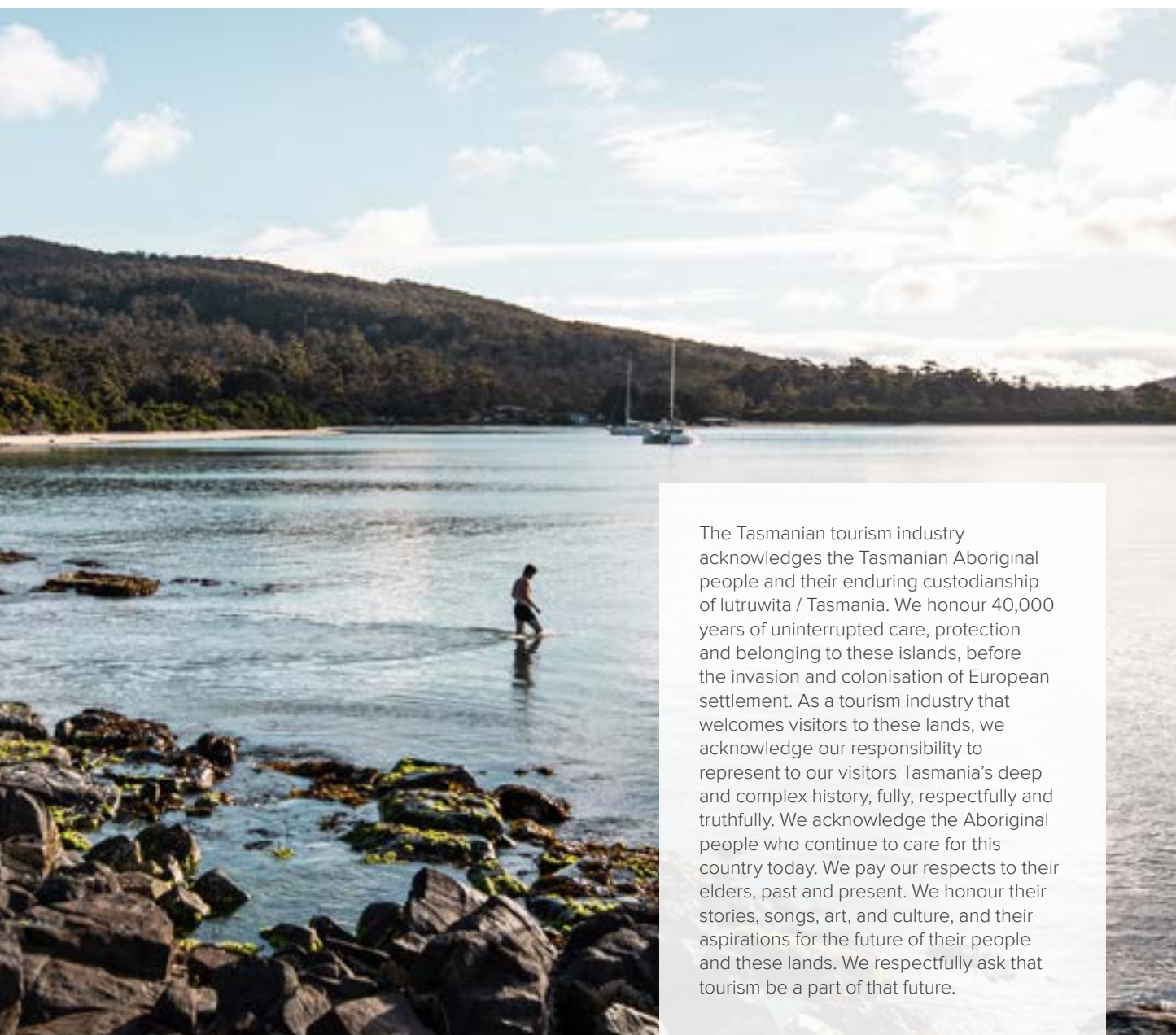
◀ Cover image Summit of kunanyi / Mt Wellington. EMILIE RISTEVSKI      Tasmanian images: Destination Southern Tasmania, Tourism Tasmania



▲ Cockle Creek. LIAM NEAL

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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.

# Executive summary

## TASMANIAN BRAND

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. Come Down for Air is an invitation to get air in both a literal and metaphorical sense. It is about harnessing the power of place and our people and creating a moment of calm for travellers.



## DESTINATION SOUTHERN TASMANIA VISION

To have an engaged, connected and sustainable visitor economy which offers a truly compelling visitor experience.



## GOALS

- 1 nipaluna / Hobart is recognised as a vibrant capital city with access to the world at the centre of a diverse region.
- 2 Over 85% of visitors to nipaluna / Hobart also visit somewhere else in the southern Tasmanian region.
- 3 Our attractions are high quality and our experiences exceed expectations.
- 4 We work to attract new developments and experiences that have sustainability at their core.
- 5 We grow yield from the visitors that arrive here.
- 6 We work collaboratively with partners in industry, government and the community.



## PILLARS

### A MOUNTAIN CITY ON THE WATER

The gateway to lutruwita / Tasmania, framed by mountains, harbour and seas, nipaluna / Hobart embraces visitors with high quality creative experiences; food, wine and events; and easy access to nature and heritage.

#### Catalyst projects

- kunanyi / Mount Wellington master plan
- International flights into Hobart Airport
- nipaluna / Hobart waterfront (Castray Point vision, Macquarie Point)
- AFL team and additional major sporting events
- Mona Hotel

### A REGION OF FOOD, ART, FESTIVALS AND CULTURE

A region recognised for its arts, vibrant festivals and connections to makers and creators.

#### Catalyst projects

- Mona development
- Distillery growth
- *Transformer* project
- Major festivals and events
- Agritourism
- Wooden boat building at Franklin
- Corridor of Modern Art project

### ACCESSIBLE NATURAL WILDERNESS AND CULTURAL HERITAGE

You can be a world away in accessible wilderness choosing your own adventure or travelling in time to explore cultural heritage.

#### Catalyst projects

- Southern-most Point of Australia
- Dark Sky Sanctuary
- Distillery growth
- Cultural experiences delivered by the Tasmanian Aboriginal community
- Major festivals and events
- Hastings Caves and Thermal Springs redevelopment
- Mount Field redevelopment
- Mountain biking developments
- Tall Trees
- Cape Bruny Lighthouse development
- Trail running events



## STRATEGIC PRIORITIES

Aligned with T21 action plan priorities

# 1

### Rebuilding visitation

- Marketing
- Tasmania's natural environment
- Home-grown festivals and events
- Drive holidays and Tassie road trips
- Playing to our creative strengths

# 2

### Access

- Cruise
- Hobart International Airport
- Bruny Island
- Derwent River
- Roads and public transport

# 3

### Supporting our people

- Business support
- Workforce development
- Connection and collaboration between operators and regions

# 4

### Shaping our future

- Tasmanian Aboriginal people
- Climate change
- Inclusive tourism

# 5

### Catalyst investment priorities

- kunanyi / Mount Wellington master plan
- Great Lake Adventure Trail
- Castray Point development
- South East Mountain Bike Plan
- Willow Court development
- Arm End and Seven Mile Beach iconic golf developments



## IMPLEMENTATION PLAN

Implementation of this destination management plan will occur in partnership with a broad range of government agencies and organisations. The tables on pages 17-22 set out a high-level implementation plan. The tables are intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

## MEASURING OUR SUCCESS\*

- ✓ Increase of tourism contribution to GDP
- ✓ Increased per visitor spend
- ✓ Increased per visitor length of stay
- ✓ Increase in repeat visitation
- ✓ Increase in seasonal visitation
- ✓ Improved community sentiments on tourism
- ✓ Increased participation by local Aboriginal people in tourism
- ✓ Demonstrated improved brand recognition and marketing KPIs (likes, searches, click throughs) as a desired destination
- ✓ Progress towards carbon neutrality and Sustainable Destination status
- ✓ Retain businesses in the visitor economy that are resilient, profitable and sustainable

\* DST will also align our measures of success to the T21 and 2030 strategy as they are developed. Current T21 goals are: achieving \$2.5 billion in visitor spending by December 2022; growing the value of tourism to regions by increasing visitor spend; and generating more jobs for Tasmanians.

# Introduction

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

The *Tourism 21 Visitor Economy Action Plan 2020-2022 (T21)* is the overarching statewide document developed in collaboration with the Tourism Industry Council of Tasmania (TICT). It sets the goals and priorities for tourism in Tasmania as a pathway to tourism recovery for the state.

Key goals of *T21* 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 *T21*, the DMPs will equally inform the future vision and strategy for the visitor economy of Tasmania, as well as determine strategic priorities for each region and direct the collective investment in regional tourism to maximise desired outcomes.

*T21* was informed by pandemic impacts, previous Destination Management Plans, Destination Action Plans, as well as aspirations from the initial consultation with stakeholders to inform a future Tourism 2030 strategy. These aspirations are:

- Grow visitation to Tasmania that is economically, environmentally and socially sustainable
- Grow yield and visitation numbers
- Grow intrastate tourism through product awareness and community engagement
- Put our regional towns and destinations at the heart of the visitor experience
- Respectfully encourage and support Tasmanian Aboriginal people in the sharing of their culture through visitor experiences
- Demonstrate responsible stewardship for our protected areas
- Tell Tasmanian stories and celebrate who we are
- Evolve profitable and sustainable businesses
- Foster diversity and the next generation of industry leaders.

COVID-19 travel restrictions and border closures have had significant impacts to Tasmanian visitation, the tourism industry and the broader Tasmanian economy. For the year ending March 2021, overall visitor numbers dropped by 75% compared with the year ending March 2020, and expenditure had dropped by 68% to \$813 million (previously \$2.5 billion).<sup>1</sup>

Summer 2021 (January-March) in Tasmania saw some positive growth, with visitor nights up by 2.2 nights in March 2021 (from 2019) and a noticeable swing to a preference for self-contained and luxury accommodation. Domestic visitors spent 29% more in the state in March 2021 compared to March 2019. Average spend per visitor was therefore also up at around 48% higher spend per visitor than March 2019.<sup>2</sup>

The four Regional Tourism Organisations will provide direction for growth and development opportunities for the regions in the visitor economy. The visitor economy is about more than just the tourism sector. It relates to any spend by visitors 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.

1, 2 Tasmanian Tourism Snapshot, year end March 2021, Tourism Tasmania



▲ Pumphouse Point. ROB MULALLY

# Current overview of visitation and population

## Southern Tasmania

Comprised of the traditional land and waterways of the palawa people, the southern Tasmanian region covers 11 municipalities.

The region is home to 279,000 residents, many residing within Greater Hobart.<sup>3</sup>

### Location population

Greater Hobart (includes Glenorchy, Clarence, Kingborough, Sorell)	222,356
Derwent Valley	10,021
Huon Valley	16,199
Central Highlands	2,141
Southern Midlands	6,043
Tasman	2,372

As Tasmania's capital city and home to the state's major gateway, Hobart Airport, southern Tasmania is the state's most visited region. Prior to COVID-19, southern Tasmania welcomed over one million visitors annually (78% of all visitors to Tasmania), staying for a total of 3.9 million nights (37% of all visitor nights) and generating \$1.38 billion for the regional economy.<sup>4</sup>

Just over half (54%) of all southern Tasmania's visitors are travelling for holiday purposes, with a large number visiting friends and relatives (22%) or travelling for business (19%). A large proportion of these visitors remain in Hobart during their visit, with lesser dispersal into the broader southern region.



▲ Three Capes Track – Cape Huay. TASMANIA PARKS AND WILDLIFE SERVICE

3 ABS Census 2016

4 Tasmanian Visitor Data, TVS Analyser March 2020





## Current regional strengths

We have many regional assets; natural, historical, cultural and more. Underpinning it all is the innovation and vision of our industry operators who bring them to life.

### kunanyi / Mount Wellington

kunanyi / Mount Wellington stands tall and can be seen from just about anywhere in Hobart. The mountain boasts temperate rainforest, sub-alpine flora, glacial rock formations and panoramic views of Hobart, Bruny Island, River Derwent, D'Entrecasteaux Channel and into the Southwest Wilderness. There are numerous rock climbing locations, and walking and mountain bike tracks, ranging from easy to more challenging. A range of developments have been scoped and/or proposed, including establishing the mountain as a world class mountain bike destination.

### Creative culture

From the world renowned artworks and large scale installations at Mona (Museum of Old and New Art), to the contemporary galleries and eclectic studios in Salamanca Place, southern Tasmania is a hub of vibrant and creative culture.

The Wooden Boat Centre in the Huon Valley displays a true heritage art form, with master wooden boat builders curating workshops and sailing experiences today. Southern Tasmania is packed with writers, artists and artisans, who are inspired by their bucolic surroundings to create and share their unique work and produce with visitors and locals alike.

The Wall in the Wilderness is storytelling at its finest. Standing 100 metres long and three metres high,



▲ Penitentiary – Port Arthur Historic Site. ALASTAIR BETT

this installation is a series of sculptural reliefs, hand-carved in Huon Pine, depicting the history, hardship and perseverance of the people in the Central Highlands.

### Heritage

Throughout southern Tasmania, including within the city of Hobart, are structures of old, many of which are still used today. The region incorporates World Heritage listed convict sites such as Port Arthur Historic Site, The Coal Mines and Cascades Female Factory. First settled in 1803, many buildings and structures of southern Tasmania are among the oldest of their kind in the country including the historic Richmond Village and Richmond Bridge, the Tasmanian Museum and Art Gallery, Cape Bruny Lighthouse, the Theatre Royal, Hobart Synagogue and Cascade Brewery.

Many of these landmarks were hand-crafted by convicts and bear the physical marks and reminders of the first stories of settlement.

A rich Aboriginal culture carries stories of Tasmania's history long before convicts or settlers, and we

are beginning to see these stories, language and practices woven into a wide range of visitor experiences and everyday life.

### Multi Day walks

Southern Tasmania has three iconic multi-day walks: the South Coast Track, the Overland Track and the Three Capes Track. Each product attracts and supports a different interstate and intrastate market. From soft adventure to true immersion in challenging wilderness, the region highlights the best of Tasmania's natural environment.

### Southern produce

Beyond the city are stretches of agricultural land offering fresh produce and farmgate experiences. Agritourism experiences can be found throughout the Huon, Derwent and Coal River Valleys as well as Bruny Island and Tasman and Heritage Highways, with opportunities to sample locally made chocolate, oysters, honey, lavender, cheese, wine, spirits, beer, cider and more. Each Saturday and Sunday is an opportunity for producers to come together and showcase their spoils in Greater Hobart at the Salamanca and Farmgate Markets, as well as across many delightful markets in regional towns.



▲ Dark Mofo: Winter Feast. ADAM GIBSON

## Island life

Not only is Hobart a mountain city, the southern region is framed by the Tasman Sea, giving us hundreds of kilometres of spectacular coastline. Our maritime environment influences all aspects of life for visitors and locals, including our hobbies (fishing, diving, rock climbing, surfing, sailing, kayaking), our visitor experiences (whale watching, birdwatching, wildlife and wilderness cruises); what we eat (seafood); what we create (photography, books, paintings); even the air we breathe is laced with the purest ocean salt.

Southern Tasmania is also home to Cockle Creek, Australia's southern-most road with the next stop being Antarctica and the start of the South Coast Track in the Southwest National Park.

## A city surrounded by nature

Beyond kunanyi / Mount Wellington is a range of spectacular natural experiences. Mount Field National Park is a little more than an hour from Hobart through the Derwent Valley. A further two hours on is Lake St Clair (part of the World Heritage Cradle Mountain-Lake St Clair National Park), Australia's deepest freshwater lake. The Styx Valley is home to some of Australia's tallest living trees.

South of Hobart is Tahune Adventures with tree top airwalks, cable gliding and rafting experiences. Hastings Caves is the site of Tasmania's only thermal springs. The Tasmanian World Heritage Wilderness Area covers almost 25% of the state's land area and is a mecca for bushwalkers, scenic flights and kayakers from all over the world.

The towering dolerite sea cliffs of Bruny Island and the Tasman Peninsula are impressive and imposing enough to intimidate even the most hardy adventurer.

Wildlife is also abundant throughout the southern region, with visitors able to get up close and personal with wallabies, Tasmanian devils, wombats, possums, seals, quolls, dolphins, whales and birdlife.

## Events

Southern Tasmania's calendar is jam-packed with events that highlight the character of the region. nipaluna / Hobart hosts the state's major sporting events with Basketball, AFL, Cricket and more showcased at the MyState Bank Arena, Blundstone Arena / Bellerive Oval as well as a future opportunity for a new AFL stadium in the south. Not just a fair-weather destination, the place lights up in winter with a stream of events and festivals including Dark Mofo, Festival of Voices, Tasmanian Whisky Week and Beaker Street, all created in celebration of Tasmanianness.

The weekly Salamanca and Farm Gate markets in Hobart attract huge crowds every weekend; boutique festivals such as the Cygnet Folk Festival, Koonya Garlic Festival and Huon Valley Mid-Winter Festival provide an opportunity to connect with regional villages; and the annual Sydney to Hobart Yacht Race and accompanying Taste of Summer Festival draws crowds from far and wide during New Year.

# Opportunities to grow

## 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 travel with less discretionary expenditure of purchases like leisure travel and softening of international visitor growth to Tasmania. Intrastate travel has increased with 'short breaks'. Interstate markets are also active with short breaks as well as longer self-drive holidays. The important interstate 'visiting friends and relatives' market also remains strong.

### Increasing competition for domestic tourism

We will see a shift in traditional markets with the volume of international visitors staying low until at least late 2022 and possibly much longer. Demand for domestic tourism however will continue to increase over 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 island state over other destinations.



▲ Richmond Bridge.

### Generational shifts

As more Baby Boomers hit retirement age, Generation Y now make up most of the workforce and the family market. Gen Z are now entering the workforce and have different values and preferences to those who came before. Social connection and conscious consumerism will generate demand for sustainable and regenerative practices, carbon-positive products and ethical 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.

### Environmental sustainability

As global warming continues to overwhelm the world, there is an imperative to encourage communities and individuals 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.

### Social license for tourism

How residents feel about tourism is also becoming 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.

### Experiential and local

The cultural economy has continued to develop in recent years, producing a shift away from the patronage and subsidy of high culture, towards support for the creative industries, thus fuelling the emergence of co-created culture. Travellers are seeking immersive experiences anchored in local culture. Destinations' cultural and creative elements 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..



▲ Left of Field Caravan Park. OFF THE PATH

# Southern Tasmania positioning pillars

As a destination, southern Tasmania has a very broad product offering. The three pillars reflect the unique features and strengths of the region.

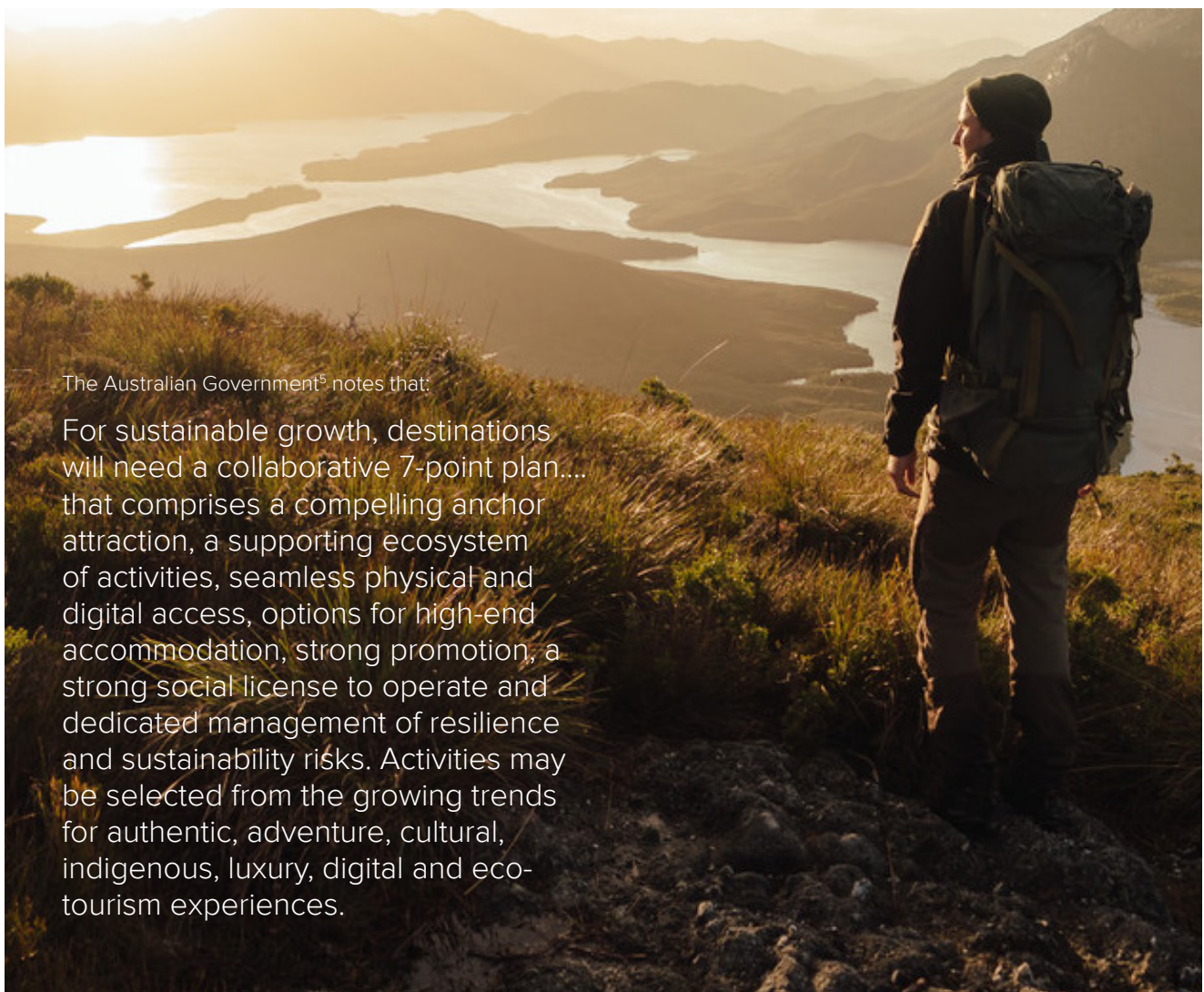
Each pillar has the potential to enable the realisation of the vision, positioning and therefore community and stakeholder aspirations. While these pillars serve to identify areas of strength for the destination, they also help to ensure that there is a diverse experiential offering in the region that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

We have identified **catalyst projects** for each pillar that are the strongest regional opportunities for new product or investment, as well as identifying our current **hero and supporting experiences**.

**Hero experiences** are exceptional experiences that:

- provide a destination with a real competitive advantage over other destinations
- focus on what is truly unique, memorable or engaging about a destination, and
- meet the needs of the identified target markets.

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



The Australian Government<sup>5</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 license 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.

▲ Bathurst Harbour, Southwest National Park. JASON CHARLES HILL



## PILLAR 1

# A MOUNTAIN CITY ON THE WATER

The gateway to lutruwita / Tasmania, framed by mountains, harbour and seas, nipaluna / Hobart embraces visitors with high quality creative experiences, food wine and events, and easy access to nature and heritage.

### Catalyst projects

- kunanyi / Mount Wellington master plan
- International flights into Hobart Airport
- nipaluna / Hobart waterfront (Castray Point vision, Macquarie Point)
- AFL stadium
- Mona Hotel

### Existing hero and support experiences

- Tasmania's most visited tourism attraction, the Salamanca Market
- The Farm Gate Market showcasing Tasmanian producers
- Eclectic and scaled range of accommodation to attract most markets
- Epicenter of business events in Tasmania, attracting ambassadors from across the world
- World Heritage listed historic sites
- Host city to our major, large scale events
- Main port for cruise ship visits
- Spectacular hospitality offering (food and drink)
- Vibrant night time economy
- Centre to our arts and theatre experiences (The Hedberg, Theatre Royal and Federation Concert Hall amongst others)



## PILLAR 2

# A REGION OF FOOD, ART, FESTIVALS AND CULTURE

A region recognised for its arts, vibrant festivals and connections to makers and creators.

### Catalyst projects

- Mona development
- Distillery growth
- "Transformer" project
- Major festivals and events
- Agritourism
- Wooden boat building at Franklin
- Corridor of Modern Art (COMA)
- Arm End and Seven Mile Beach iconic golf developments

### Existing hero and support experiences

- Vibrant regional events
- Existing major festivals and events
- Meet the maker and producer
- Regional and city based artists and makers producing small batch, high quality products
- Showcasing excellence in the production of wine, whisky, gin, vodka and rum
- Destination dining highlighting the highest quality food
- Diverse range of multicultural food offerings in Greater Hobart





## PILLAR 3

# ACCESSIBLE NATURAL WILDERNESS AND CULTURAL HERITAGE

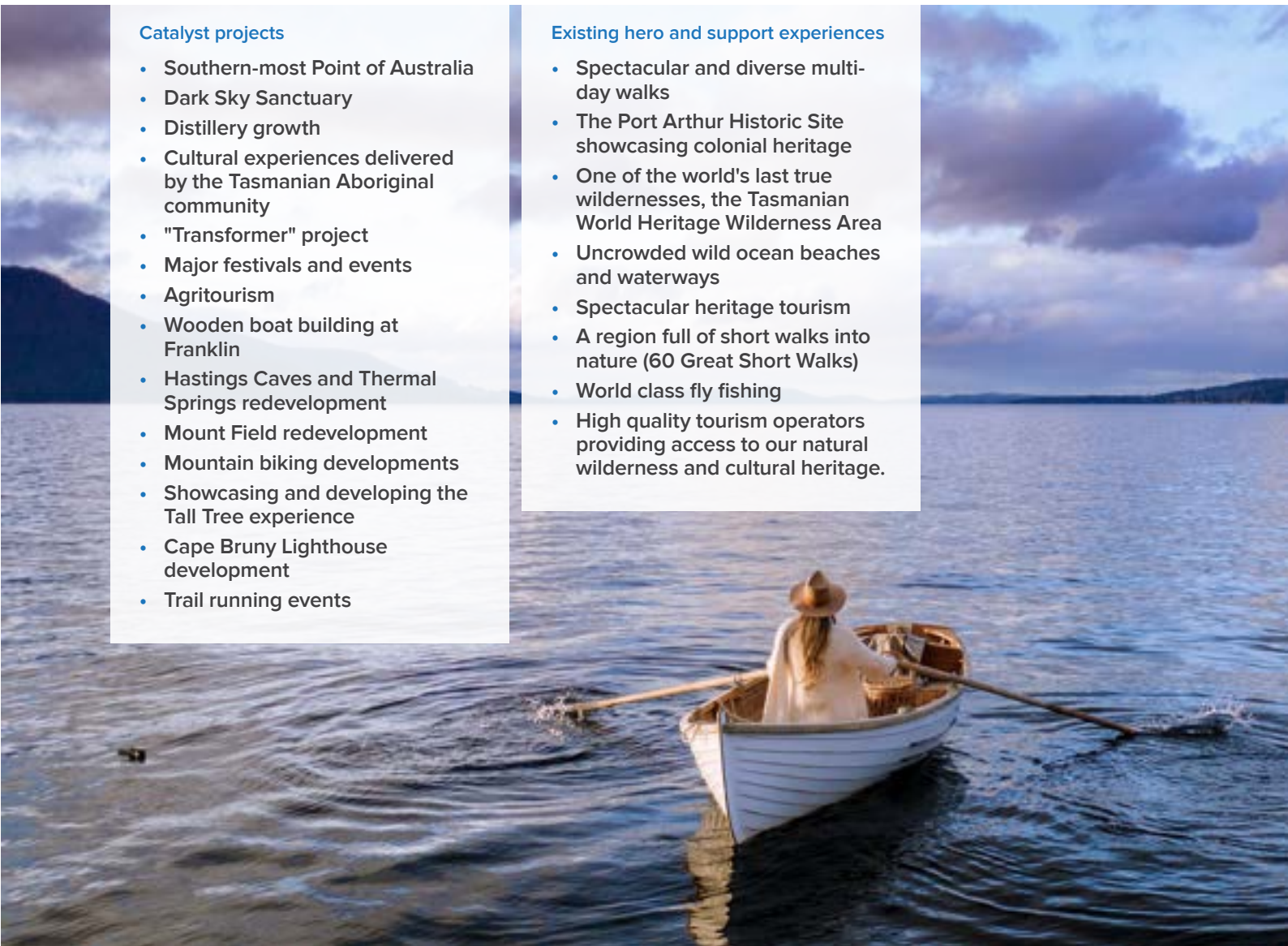
You can be a world away in accessible wilderness choosing your own adventure or travelling in time to explore cultural heritage.

### Catalyst projects

- Southern-most Point of Australia
- Dark Sky Sanctuary
- Distillery growth
- Cultural experiences delivered by the Tasmanian Aboriginal community
- "Transformer" project
- Major festivals and events
- Agritourism
- Wooden boat building at Franklin
- Hastings Caves and Thermal Springs redevelopment
- Mount Field redevelopment
- Mountain biking developments
- Showcasing and developing the Tall Tree experience
- Cape Bruny Lighthouse development
- Trail running events

### Existing hero and support experiences

- Spectacular and diverse multi-day walks
- The Port Arthur Historic Site showcasing colonial heritage
- One of the world's last true wildernesses, the Tasmanian World Heritage Wilderness Area
- Uncrowded wild ocean beaches and waterways
- Spectacular heritage tourism
- A region full of short walks into nature (60 Great Short Walks)
- World class fly fishing
- High quality tourism operators providing access to our natural wilderness and cultural heritage.



▲ Satellite Island. EMILIE RISTEVSKI

# Strategic priorities

Aligned with T21 strategic priorities

Our priorities are focussed on generating stronger yield by increasing length of stay, expenditure per visitor and repeat visitation, and by creating benefits for our community. Each priority has a supporting set of actions.

## STRATEGIC PRIORITY 1 Rebuilding visitation

- Marketing
- Tasmania's natural environment
- Home-grown festivals and events
- Drive holidays and Tassie road trips
- Playing to our creative strengths

## STRATEGIC PRIORITY 2 Access

- Cruise
- Hobart International Airport
- Bruny Island
- Derwent River Ferries
- Roads and public transport

## STRATEGIC PRIORITY 3 Supporting our people

- Business support
- Workforce development
- Connection and collaboration between operators and regions

## STRATEGIC PRIORITY 4 Shaping our future

- Tasmanian Aboriginal people
- Climate change
- Inclusive tourism

## STRATEGIC PRIORITY 5 Catalyst investment projects

- kunanyi/Mount Wellington master plan
- Castray Point and Macquarie Point development
- Great Lake Adventure Trail
- Castray Point development
- South East Mountain Bike Plan
- Willow Court development
- Arm End and Seven Mile Beach iconic golf developments

# Goals

1

nipaluna / Hobart is recognised as a vibrant capital city with access to the world at the centre of a diverse region.

2

Over 85% of visitors to nipaluna / Hobart also visit somewhere else in the southern Tasmanian region.

3

Our attractions are high quality and our experiences exceed expectations.

4

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5

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# Implementation plan

Implementation of this destination management plan will occur in partnership with a broad range of government agencies and organisations. The tables on pages 17-22 set out a high-level implementation plan. This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

## STRATEGIC PRIORITY 1: REBUILDING VISITATION

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Marketing</b>				
Grow the partnership between Tourism Tasmania, DST and operators in southern Tasmania to ensure the region is best represented in marketing programs.	ONGOING	Tourism Tasmania, Industry partners	N/A	6
Support the Tasmanian Travel and Information Centre as the centre of visitor servicing for the state, including modern and innovative ways to improve visitor servicing outcomes across the region.	HIGH	City of Hobart, Tourism Tasmania, Department of State Growth, Tasmanian Visitor Information Network	1	1
Provide on-brand content and insights for Tourism Tasmania's interstate and international campaigns.	ONGOING	Tourism Tasmania	N/A	6
Support the promotion and evolution of the self-drive touring market through the three drive journeys in the region (Heartlands, Western Wilds and Southern Edge).	MEDIUM	Tourism Tasmania, Local Tourism Associations, Local Government Areas	N/A	2
Support Tourism Tasmania's evolution of digital marketing assets and tools to provide a better online experience for visitors.	HIGH	Tourism Tasmania	N/A	2
Support Tourism Tasmania's evolution of digital marketing assets to include rich regional content from the Hobart and Beyond channels.	HIGH	Tourism Tasmania	N/A	2

## STRATEGIC PRIORITY 1: REBUILDING VISITATION

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Tasmania's natural environment</b>				
Work with PWS to enhance the southern-most point experience taking into account visitor and community needs.	MEDIUM	Destination Southern Tasmania, Parks and Wildlife Service	3	2,3
Improve visitor services and facilities in the national parks in the southern region including Mount Field, Hastings Caves and Thermal Springs, South Bruny, Tasman National Park and Hartz Mountains.	MEDIUM	Parks and Wildlife Service	3	2,3
Advocate for a full master plan of kunanyi/ Mount Wellington with improved governance, funding model, access and visitor experiences supporting mountain biking, community access and experiences. Develop the Port to Pinnacle experience.	HIGH	Tourism Industry Council of Tasmania, City of Hobart, Wellington Park Management Trust, Glenorchy City Council, Huon Valley Council, Parks and Wildlife	1	3
Seek investment for and promotion of the Tall Trees experience in the Tahune area, Styx Valley and Mount Field National Park.	HIGH	Parks and Wildlife Service	3	3,4
<b>Home-grown festivals and events</b>				
Support and market the existing and emerging southern regional events.	HIGH	Events Tasmania, Tourism Tasmania, Local Tourism Associations	2	6
Continue to support and develop events in Hobart in the shoulder and off seasons that encourage visitors to disperse across the southern region.	HIGH	Events Tasmania, Local Tourism Associations	2	2,5
<b>Self drive touring and Tassie road trips</b>				
Work closely in partnership with East Coast Tasmania on the development of the drives that link the Tasman Peninsula with the East Coast and Hobart to create a more integrated experience.	LOW	East Coast Tourism, Department of State Growth, Sorell Council, Tasman Council	N/A	2,5
Attract investment in infrastructure that supports the visitor economy and the increased capacity of the Spirits of Tasmania vessels such as RV / long vehicle parking, signage, maintenance of facilities, caravan and camp grounds and other priorities.	MEDIUM	Local Government Areas, Office of Coordinator General	N/A	3
Support and promote new and existing food and beverage provenance, agritourism and cellar door experiences on offer in each of the southern Tasmanian regions.	HIGH	Tourism Tasmania, Opening The Gate, Local Government Areas, Local Tourism Associations	2	3,4

## STRATEGIC PRIORITY 1: REBUILDING VISITATION

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Playing to our creative strengths</b>				
Develop the Franklin foreshore as a centre of wooden boat building and timber craft including improving and growing the wooden boat centre.	HIGH	Department of State Growth, Huon Valley Council, Wooden Boat Centre	2	3,4
Support the development of <i>Transformer</i> at Ida Bay.	HIGH	Dark Lab, Huon Valley Council, Department of State Growth, Sustainable Timbers Tasmania, Parks and Wildlife Service	2	3,4
Leverage the opportunities presented by The Hedberg (UTAS) and the MyState Bank Arena redevelopment.	MEDIUM	Events Tasmania, City of Hobart, Glenorchy City Council	2	3,4

## STRATEGIC PRIORITY 2: ACCESS

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Cruise</b>				
Work with the Tasmanian Government to highlight the opportunities for cruising in southern Tasmania.	MEDIUM	Tourism Tasmania, Department of State Growth, TasPorts, City of Hobart, industry partners, Parks and Wildlife Service	1	5
Deliver opportunities for cruising in southern Tasmania to increase the yield and regional dispersal.	MEDIUM	TasPorts, City of Hobart, industry partners	1	5
<b>Hobart Airport</b>				
Support increased access to international destinations via Hobart Airport and advocate for the strengthening of the main runway to facilitate international freight movements and to strengthen the Antarctic gateway connection.	HIGH	Hobart Airport, Tourism Industry Council of Tasmania, Hobart City Deal	1	6
<b>Bruny Island</b>				
Ensure Bruny Island ferry frequency and capacity is sufficient to cater for growth and meet the needs of Bruny Island's visitors, businesses and locals.	HIGH	Department of State Growth, Bruny Island Tourism, SeaLink, Kingborough Council	N/A	3,4,5
<b>Derwent River</b>				
Activate the Derwent River including the linkages to New Norfolk with the eventual replacement of the Bridgewater Bridge.	MEDIUM	Department of State Growth, Clarence City Council, City of Hobart, Derwent Valley Council, TasPorts	1	3,4,5

## STRATEGIC PRIORITY 3: SUPPORTING OUR PEOPLE

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Business</b>				
DST to act as a conduit and triage service to assist businesses access professional support services.	HIGH	Department of State Growth, Enterprise Centres, Local Government Areas, Tasmanian Hospitality Association, industry partners	N/A	5
Encourage industry uptake of the Australian Tourism Data Warehouse (ATDW) and provide industry training.	ONGOING	Tourism Tasmania, Federal Government, industry partners	N/A	5
Developing a corporate and social responsibility charter for DST in partnership with the southern Tasmanian tourism industry.	MEDIUM	industry partners	N/A	6
Continue to hold regular networking events that have an educational aspect.	ONGOING	industry partners	N/A	6
Promote and deliver industry training programs and mentorship.	ONGOING	Tourism Industry Council of Tasmania, Department of State Growth,	N/A	6
Continue to develop the cross region famil program 'Know Your Neighbour' to create collaborative relationships and drive referrals.	ONGOING	Business Events Tasmania, Tourism Tasmania, Local Tourism Associations	N/A	6
<b>Workforce</b>				
Support tourism students to connect with industry through DST events and operations.	HIGH	TasTafe, Visitor Experience Tasmania, University of Tasmania	N/A	6
Support practical initiatives that connect employers to job-ready people.	HIGH	Tasmanian Hospitality Association, Jobs Tasmania, Business and Employment Southeast Tasmania, Jobs Hubs, Skills Tasmania	N/A	6
Assist with creating pathways for students, youth and community members to increase the trained workforce for the visitor economy businesses.	HIGH	Tasmanian Hospitality Association, Jobs Tasmania, Business and Employment Southeast Tasmania, Jobs Hubs, Skills Tasmania, Visitor Experience Training, Beacon Foundation, University of Tasmania	N/A	6
Support initiatives that provide mental health and wellbeing services to the tourism and hospitality industries.	HIGH	Tasmanian Hospitality Association, Tourism Industry Council of Tasmania, Lifeline	N/A	6

## STRATEGIC PRIORITY 4: SHAPING OUR FUTURE

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
<b>Tasmanian Aboriginal people</b>				
Continue to invest in meaningful relationships with the Tasmanian Aboriginal community and build capacity with industry and the community to jointly develop experiences and tourism opportunities showcasing the Tasmanian Aboriginal culture and its history respectfully and truthfully. Collaborate on any state wide initiatives with this goal.	ONGOING	Tasmanian Aboriginal Centre, South East Tasmanian Aboriginal Corporation, Parks and Wildlife Service	3	6
Integrate dual naming in destination marketing.	HIGH	Tasmanian Aboriginal Centre, Tourism Tasmania	3	6
<b>Climate change</b>				
Support the statewide strategy for carbon positive Tasmania as well as supporting short term initiatives for use of paper bags, no single use plastics, reduction of organic waste and installation of electric vehicle chargers in towns.	MEDIUM	Local Government Areas, Department of State Growth, University of Tasmania, Tasmanian Hospitality Association, Tourism Industry Council of Tasmania, Parks and Wildlife Service	N/A	4
Encourage industry operators to implement regenerative tourism initiatives for their businesses.	ONGOING	industry partners	N/A	4
<b>Inclusive tourism</b>				
Work with industry and stakeholders to raise the quality, quantity and marketing of inclusive tourism products.	HIGH	Tourism Tasmania, industry partners, Parks and Wildlife Service	N/A	6
Advocate for alternative transport options in Greater Hobart that utilise cycle paths/ riverways and other accessible options that improve liveability for residents and visitors alike.	ONGOING	City of Hobart, Clarence City Council, Glenorchy City Council	1	3
<b>Innovative and disruption</b>				
DST will support and encourage research, innovation, disruption, creativity and emerging technology to embrace and affect positive change.	ONGOING	Brand Tasmania, Tourism Tasmania, University of Tasmania, industry partners	N/A	6

## STRATEGIC PRIORITY 5: CATALYST INVESTMENT PROJECTS

This table is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement. Where there is a statewide approach already developed or in development, DST will support and work with these initiatives.

Actions	Priority level	Partners	Pillar	Goal
Work towards the development of scaled accommodation in the Huon Valley and Heritage Highway.	ONGOING	Huon Valley Council, Southern Midlands Council, Office of Coordinator General	N/A	3
Continue to advocate for and work with investors in nature-based tourism assets in the region including MTB trails (planned in hubs including on kunanyi / Mount Wellington and Sorell/Kellewie).	HIGH	Sorell Council, Department of State Growth, Office of Coordinator General, City of Hobart, Parks and Wildlife Service, Sustainable Timbers Tasmania	3	3,6
Promote investment in national parks such as Hastings Caves and Thermal Springs, Hartz Mountains and Mount Field. Support development of iconic walking tracks such as the South Coast Track.	ONGOING	Parks and Wildlife Service		3,6
Advocate for a full master plan of kunanyi/ Mount Wellington with improved governance, funding model, access and visitor experiences supporting mountain biking, community access and experiences.	HIGH	Department of State Growth, City of Hobart, Tourism Industry Council of Tasmania, Glenorchy City Council, Huon Valley Council, Wellington Park Management Trust	1	1,3,6
Advocate for the development of Macquarie Point and Castray Point into world class public spaces that offer a unique Tasmanian perspective.	HIGH	Tourism Industry Council of Tasmania, TasPorts, Macquarie Point Corporation, City of Hobart, Federal Government, University of Tasmania, Parks and Wildlife Service	1	1,3,6
Advocate for a Tasmanian AFL team and subsequent infrastructure.	LOW	City of Hobart, Tourism Industry Council of Tasmania	1	1,3,6
Seek to attract development of the visitor experience at the southern-most point of Australia (accommodation, walks, Dark Sky).	MEDIUM	Parks and Wildlife Service, Dark Sky Association, Local Government Area, industry partners	3	3,6
Support the Great Lake Adventure Trail through advocacy and identifying funding opportunities.	HIGH	Hydro Tasmania, Johns Group	3	3,5
Attract development of the Dark Sky concept for southern Tasmania including experience development for visitors.	HIGH	Dark Sky Association, Parks and Wildlife Service, Local Government Areas, industry partners	3	2,5
Invest in improved digital connectivity for southern Tasmania outside Hobart enabling residents and visitors alike to access information and plan itineraries.	ONGOING	Destination Southern Tasmania	N/A	3
Work with the Derwent Valley Council and community to attract visitor attractions into the Willow Court development area.	MEDIUM	Derwent Valley Council, industry partners	2	2,3,4
Work with Clarence City Council, State and Federal Governments and developers to advocate for and support iconic golf developments at Arm End and Seven Mile Beach.	MEDIUM	Clarence City Council, State Government, Federal Government, Developers	2	3



## Our enablers

Enablers are critical areas of performance that underpin the strategic priorities and actions. They are essential for delivering the plan and achieving the vision.

### Customer service

Support exemplars in the region and help all businesses see their opportunities for improvement through family and industry led workshops.

### Workforce growth and development

Work with state government on critical initiatives to underpin tourism industry workforce recruitment and retention (short and long term).

### Industry cohesion

DST lead the collaboration and industry cohesion for Southern Tasmania. We will continue to collaborate strongly with local and state government and other regions to ensure the Tasmanian brand and vision are delivered.

### Community support

Implement initiatives that will increase community awareness and support for the visitor economy and better integrate the industry with community.

### Sustainable funding

It is essential that RTO funding is maintained to ensure ongoing and effective destination development and marketing.



▲ Maydena Bike Park. PLACES WE GO

## State-wide initiatives and industry partnerships

There is a range of initiatives that are critical to underpinning growth across all regions, including:

- Delivering on Brand Tasmania as a united industry to ensure the whole industry grows and benefits
- Fostering a culture of sustainability and responsible tourism across the state through initiatives including:
  - conversations within industry about what it means to be sustainable
  - investing in certification programs which support tangible outcomes for the planet
- Continuing to grow accessible tourism services
- Supporting the implementation of many of the Premier's Economic and Social Recovery Advisory Council (PESRAC) recommendations that

affect the tourism sector including the Jobs Tasmania Local Network, digital connectivity, community leadership, and environment and sustainability

- Addressing labour force issues both short (as a result of COVID-19) and long term to underpin growth and diversification in the sector including:
  - accommodation shortages
  - sustainable career options
- Building on the TICT Industry accreditation program (as an existing scheme) and encouraging awareness of other appropriate certification to improve overall standard.

There is also a range of opportunities that can be delivered in partnership with all or some RTOs.

## Measuring our success\*

- Increase of tourism contribution to GDP
- Increased per visitor spend and overall yield
- Increased length of stay
- Increase in repeat visitation
- Increase in seasonal visitation
- Improved community sentiments on tourism
- Increased participation by local Aboriginal people in tourism
- Improved brand recognition and prominence as a desired destination (KPIs include: likes, searches, click-throughs, social media engagement)
- Progress towards carbon neutrality and Sustainable Destination status
- Retain businesses in the visitor economy that are resilient, profitable and sustainable.

\* DST will also align our measures of success to the T21 and 2030 strategy as they are developed.

Current T21 goals are;

- Achieving \$2.5 billion in visitor spending by December 2022.
- Growing the value of tourism to regions by increasing visitor spend.
- Generating more jobs for Tasmanians.



▲ Campsite at South Cape Bay, Southwest National Park. TOURISM TASMANIA & JAMES BOWDEN

## Risks

- Lack of adequate resourcing to deliver the Destination Management Plan
- Lack of leadership and cohesion of the industry
- Precarious funding source
- Maintenance – ensuring the right infrastructure is maintained to the right standard
- Workforce – the right skills and the right number of people
- Social license – having community support behind the industry vision and goals
- Lack of resources, including investment in the environment and culture supporting the pillars and industry.

# Appendices

# APPENDIX A – Australian travel

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

Based on results from the first quarter, it is estimated that nationally, overnight trips are up 113 million by the end of 2021, which is only four million short of pre-COVID levels. Based on this trajectory, which factors in ongoing demand, government response, travel restrictions and consumer confidence, the forecast domestic overnight trips will be up to 134 million by 2023, which is an increase of 14% 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 demand projections indicate an eventual 7% increase in international arrivals from 2019 levels.<sup>6</sup>

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

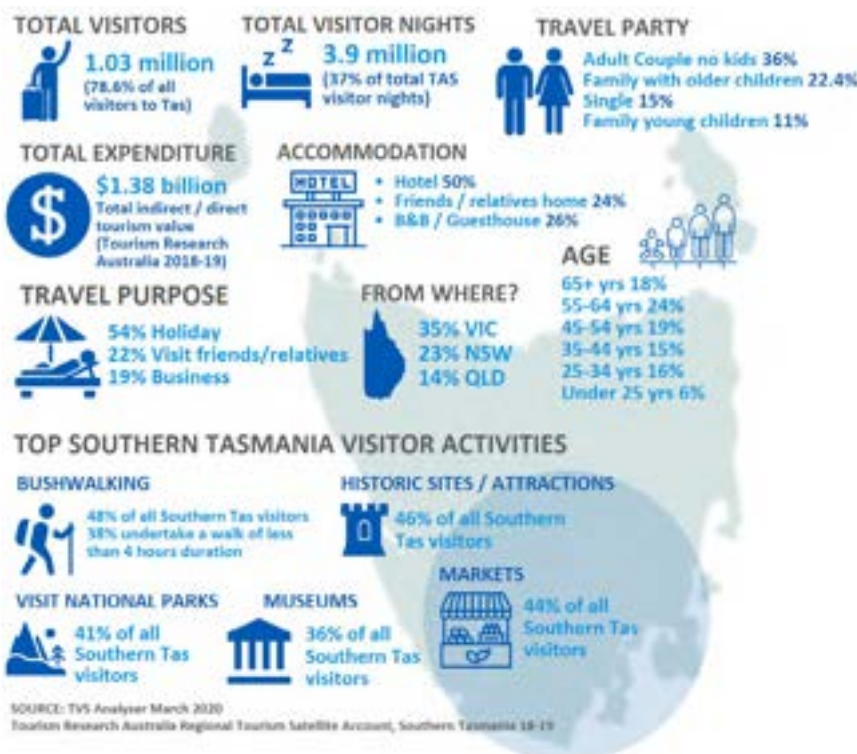
Intrastate visitation across Australia is at an all-time high, with January 2021 recording national intrastate visitor numbers up by 3% to 7.7 million compared with January 2020 and expenditure up by 17% to \$5.3 billion.

February 2021 also recorded a year-on-year increase of 2% to 5.3 million. There is strong demand for nature and outdoors experiences, self-drive touring and especially regional experiences.

Domestic leisure visitors expect to spend approximately five nights away from home on their next trip. Intrastate visitation for Tasmania also reached record levels. There has been an increase to 1.68 million trips for year-end March 2021 (up by 11%, year on year) and expenditure has increased by 36% to \$694 million.<sup>7</sup>

6 2021 Tourism and Hotel Market Outlook, Deloitte Access Economics  
7 Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021

# APPENDIX B – Southern Tasmania tourism



## TASMANIAN INTERNATIONAL VISITATION

Total international visitors to Tasmania:

**254,000**

(approx. 19.5% of all Tasmanian visitors)

**Purpose:** 79% holiday

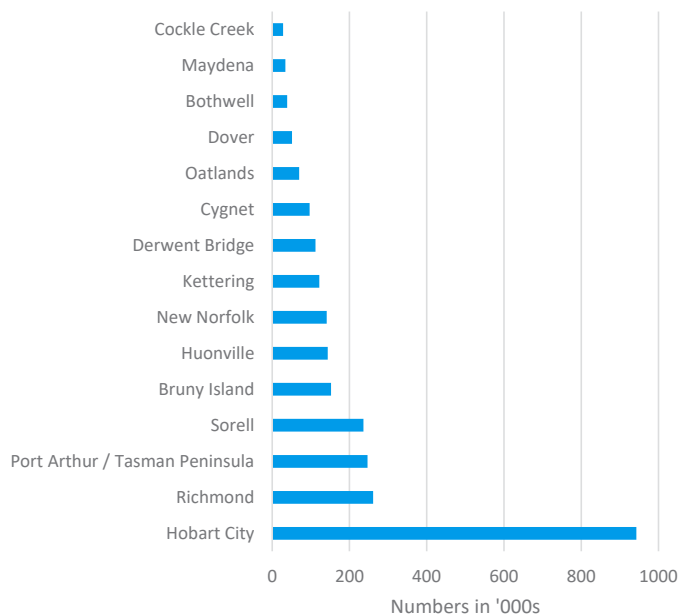
**Main markets:**

USA	15%
China	13%
UK	0%
Hong Kong	10%
NZ	7%

Year end March 2020  
(pre-international travel restrictions)

## PLACES VISITED

Figure 1: Places visited southern Tasmania year end March 2020<sup>8</sup>

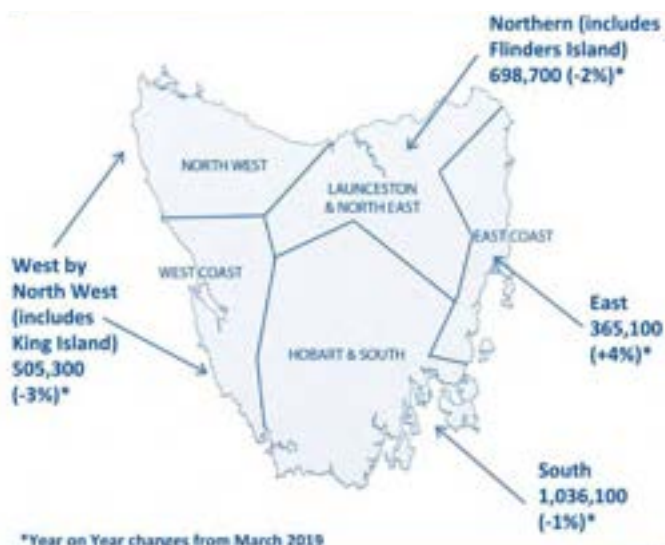


### Primary attractions by number of visitors:

Salamanca Market	405,000	Russell Falls / Mt Field National Park	101,000
kunanyi / Mt Wellington	342,000	Tasman National Park	88,000
Mona	341,000	Lake St Clair / Derwent Bridge	84,000
Port Arthur	261,000	Central Plateau / Great Lake	39,000
Royal Tasmanian Botanical Gardens	173,000	Lake Pedder / Gordon Dam	29,000
Tasman Arch / Blow Hole	168,000	Hastings Caves and Thermal Springs	28,000
Tasmanian Museum & Art Gallery	137,000	Tahune Forest Airwalk	10,000* <sup>9</sup>

## REGIONAL VISITATION

Figure 2: Annual regional visitor numbers for year end March 2020<sup>10</sup>



### How southern Tasmania compares

Hobart and surrounds tops the list as Tasmania's most visited destination. This is not surprising given its role as the state's capital and air travel accessibility (89% of all visitors arrive via a flight to Hobart Airport). 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>11</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

8, 9, 10, 11 Tasmanian Visitor Data, TVS Analyser March 2020

\* Prior to 2019 bushfire and Covid interruption, visitation fluctuates between 70k – 45k according to the TVS figures Jun 2017 – Mar 2019

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# APPENDIX C – Tourism roles and responsibilities

## LOCAL TOURISM ASSOCIATIONS

### About

Local Tourism Associations are the main representation of the industry operators within each region and play a critical role in the delivery of this DMP. They are comprised of passionate leaders and business owners within each region and work hard on a volunteer basis to grow their region, in collaboration with the Regional Tourism Organisation.

### Role

- To represent the regions unique points of difference
- To collectively represent the voice of the regions business owners
- To feed intel into the Regional Tourism Organisation for advocacy with government

### Responsibilities

The local tourism associations and the business owners within these groups are responsible for delivering a high quality visitor experience to the intrastate interstate and international market.

They are also responsible for representing the business owners needs to the Regional Tourism Organisation as well as identifying opportunities within each region.

## BRAND TASMANIA

### About

Brand Tasmania is a statutory place-branding authority.

### Role

- To develop, maintain, protect and promote a Tasmanian brand that is differentiated and enhances our appeal and competitiveness nationally and internationally;
- To strengthen Tasmania's image and reputation locally, nationally and internationally; and
- To nurture, enhance and promote the Tasmanian brand as a shared public asset.

### Responsibilities

Brand Tasmania is responsible for taking a best practice approach to ensure the Tasmanian brand is strengthened locally, nationally and internationally, and is promoted as a key asset of the Tasmanian community.

It promotes Tasmania as a place of opportunity to live, work, visit, study, invest and trade.

## DEPARTMENT OF STATE GROWTH

### 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 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.

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## LOCAL GOVERNMENT

### 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 and Hospitality Support Unit

The Tourism and Hospitality Support 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 Agritourism 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.

### About

Southern Tasmania is comprised of 11 municipalities or local government areas.

Each municipality is represented by a Council of elected members who are elected by their local community.

Councils are place shapers who drive most people's attachment to, and satisfaction with, the area in which they live. Councils play a defining role in fostering communities, where people and place are deeply connected to the work which local government does.

Local government is the level of government closest to communities.

### Role

Local Government plays a pivotal role in tourism activity, with councils actively involved in promoting tourism, providing infrastructure and services to support tourism, and managing the impacts of tourism.

### Responsibilities

- To support businesses that pay rates in their respective regions
- Assisting and facilitating events and businesses to grow
- Invest in tourist attractions and infrastructure
- Maintain public realm and environmental assets such as beaches
- Interpret local heritage and support festivals, events and tourism promotion
- Work with and support Regional and Local Tourism Associations
- Play a critical role in visitor servicing

## 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).

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## DESTINATION SOUTHERN TASMANIA

### About

Destination Southern Tasmania (DST) is the peak tourism body for Tasmania's southern region, stretching across the municipalities of Hobart, Glenorchy, Clarence, Brighton, Sorell, Kingborough, Huon Valley, Derwent Valley, Tasman, Central Highlands and Southern Midlands. DST has partnerships with each of the 11 local governments, an industry membership model and a partnership with Tourism Tasmania and the Department of State Growth.

### Role

Destination Southern Tasmania is focussed on growing visitation, increasing yield and driving regional dispersal within the destination. Funded by a combination of membership fees and support from state government and local councils, DST is an industry-led, non-profit organisation and a strong voice for tourism in the region.

### Responsibilities

- Marketing – on-ground, intrastate and collaborative with industry
- Industry development to improve local businesses and profitability. Includes networking functions, research and educational forums, training programs, speakers and regional board meetings
- Advocacy – work with all levels of government to ensure that regulatory issues affecting tourism-related businesses are understood, and solutions to problems are pro-actively sought. Work with other peak industry bodies to encourage sensible, sensitive development of quality tourism experiences and products throughout the region.

## 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.



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## THE TASMANIAN 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 provides:

- 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 regions. 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 TVIN 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 TVIN 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

## TASMANIA PARKS AND WILDLIFE SERVICE

### 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. It is 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 – Tasmanian target markets

Table 1. Detailed descriptions of the Tourism Tasmania expanded market segmentation<sup>12</sup>

	<b>RAW URBANITES – NURTURING SENSITIVE, HONEST AND REAL</b>	<b>ERUDITES – KNOWLEDGEABLE AND CULTURED, CLEAR AND COMPOSED</b>
<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>PRE-DISPOSITION 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 a 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 is 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>12</sup> Reimagining Our Regions’, Tourism Tasmania 2020



▲ Fusilier Cottage. LOIC LE GUILLY

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# APPENDIX E – Strengths, weaknesses, opportunities and threats (Southern Tasmania)

## Strengths

- Key access points into the state with Hobart International Airport and two cruise ship berthing areas in nipaluna/ Hobart and at Port Arthur
- The capital city of nipaluna / Hobart and all of its assets: river, mountain, port, beaches, parks, food, retail, services and facilities, events, markets, etc.
- Antarctic connection and the majority of accommodation
- Established operators delivering quality experiences
- Heritage tourism experiences
- Arts tourism, including TMAG, Salamanca Arts Centre, Mona, COMA and the regional arts and culture scene
- Natural diversity in one region and easy access to the coast, mountains, forests, national parks, islands, lakes, rivers and the Tasmanian Wilderness World Heritage Area
- Iconic multi-day walks (Three Capes Track, Overland and South Coast track)
- Farm gate and agritourism experiences
- Large scale iconic events – AFL, cricket, basketball, Dark Mofo, Festival of Voices, Sydney to Hobart Yacht Race, Mona Foma, amongst others
- Fly fishing, mountain biking, kayaking, helicopters, planes and other soft adventure experiences
- People - the familiarity and hospitality of small regional communities, boutique city experiences that strengthen the visitor experience
- Self-drive touring routes

## Weaknesses

- Gaining meaningful social license for new developments in nipaluna / Hobart
- Access – limited public transport options and capacity issues on the Bruny Ferry
- Lack of RV-friendly facilities when planning for new Spirit vessels
- Changing role of visitor information and servicing, particularly in nipaluna / Hobart
- Multiple digital and regional brands competing for the same consumer market
- Staff recruitment and retention and affordable staff housing in regional areas
- Quality of road access to more remote attractions such as the Styx Valley and Cockle Creek
- Lack of recognition of the Aboriginal stories of Southern Tasmania as a core part of the visitor experience
- Poor digital infrastructure and connectivity in regional areas
- Reduced opening hours for visitor economy businesses outside of nipaluna / Hobart, particularly in food and beverage
- Digital capability and utilisation of our industry operators

## Opportunities

- Community commitment to sustainability and regenerative tourism
- Development of regional night time activities enhancing overnight stays e.g. dark sky sanctuary
- Air access for international destinations through Hobart Airport by developing the runway and taxi way infrastructure
- Mountain bike trail development – kunanyi/ Mount Wellington MTB Master Plan, Kellevie Mountain Bike network, Huon Valley Mountain Bike Strategy
- Improving the Hastings Caves Thermal Springs experience
- Coastal and aquatic tourism – presents opportunities for the Derwent River upstream from nipaluna / Hobart to New Norfolk via ferry, water taxi, kayak, boating etc
- kunanyi / Mt Wellington master planning
- Developing a 'Tall Trees' experience in the Styx, Tahune and Mount Field areas
- Supporting Aboriginal tourism experiences and partnerships
- nipaluna / Hobart waterfront development. Move the CSIRO to Macquarie Point and develop its current site at Castray Point
- Development in nipaluna / Hobart of an AFL specification stadium
- Events in regional areas that encourage dispersal outside of nipaluna / Hobart, especially during shoulder and off season periods and encourage overnight visitation
- Development of more engaging agritourism experiences

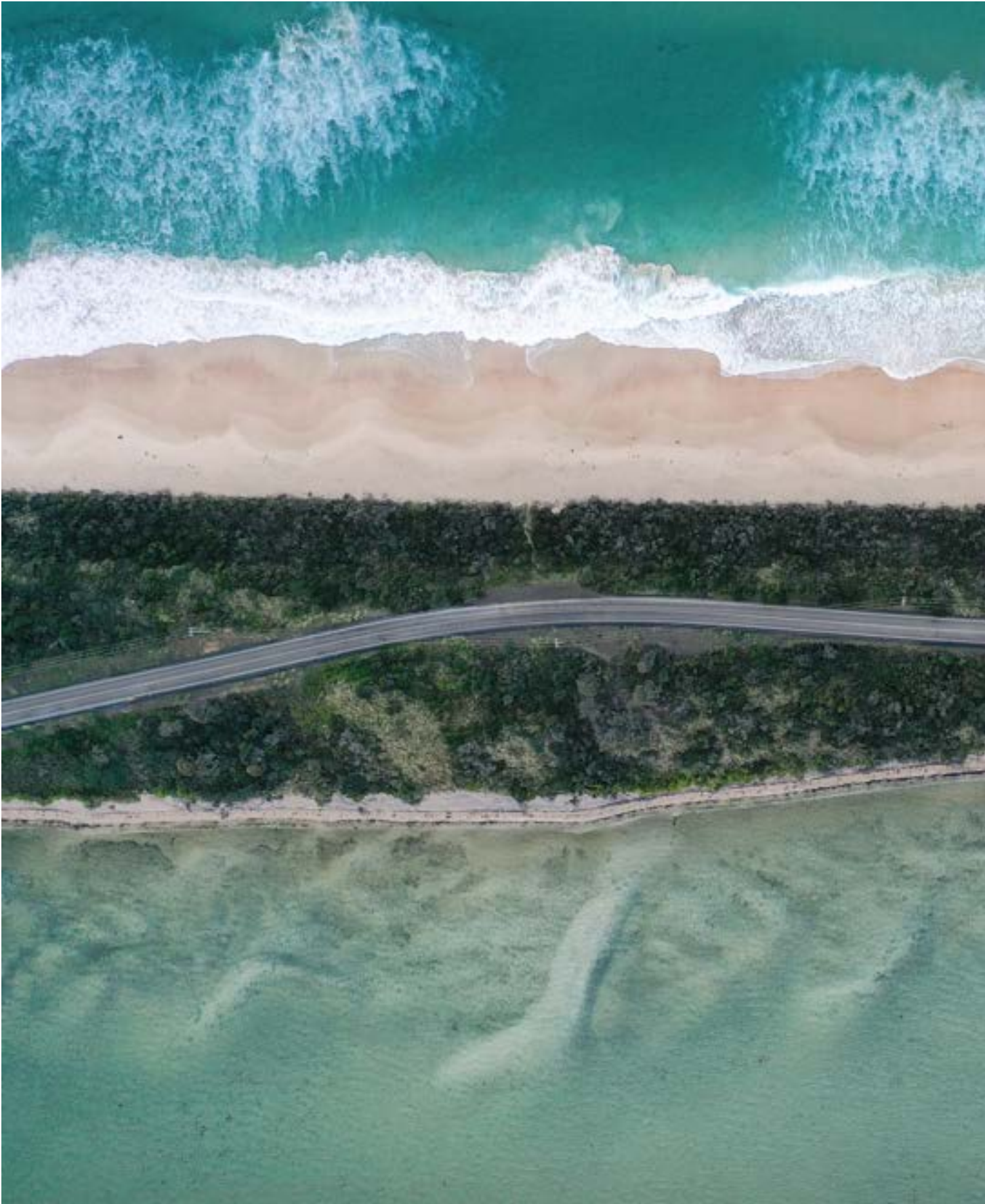
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## Threats

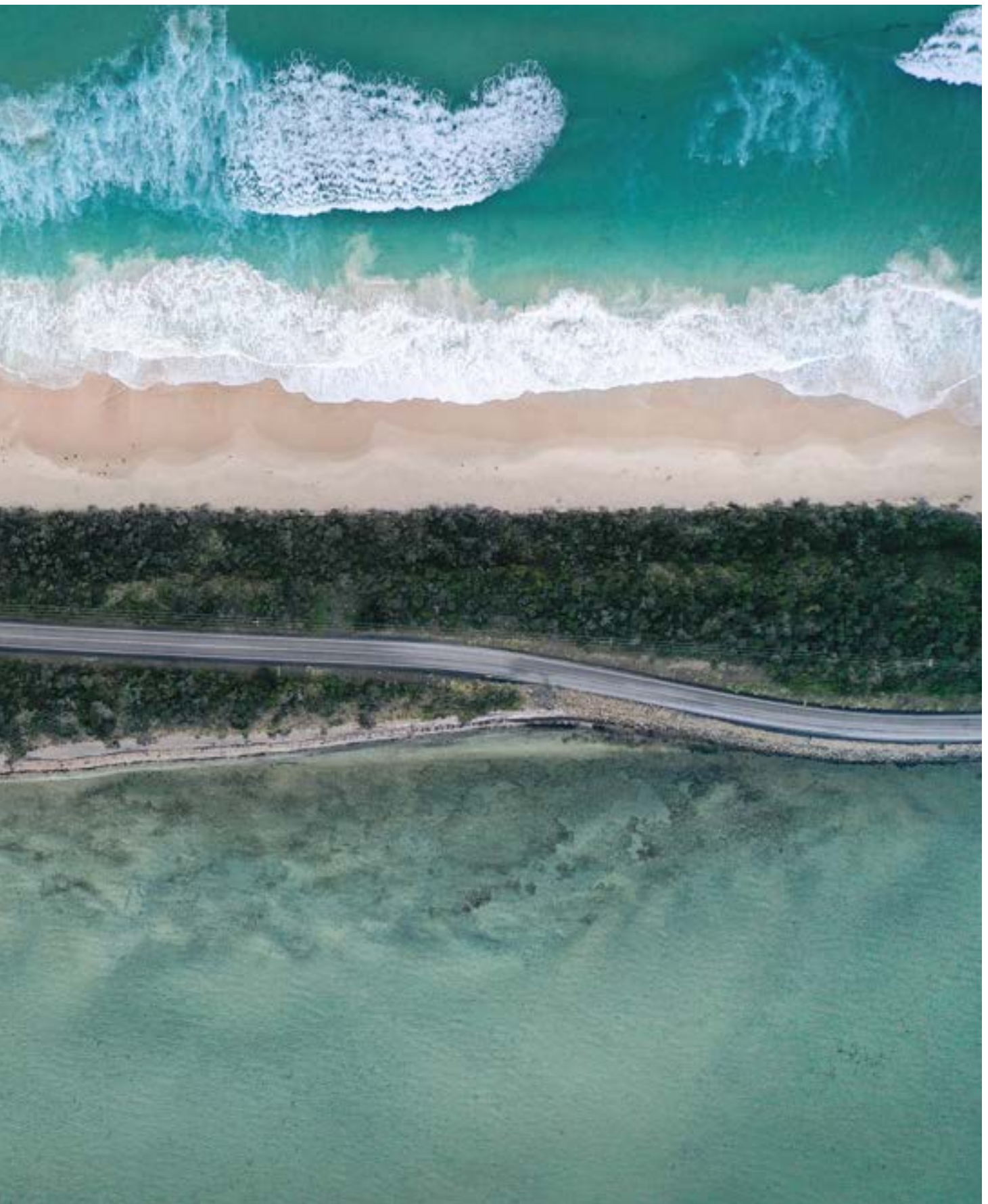
- Encourage and support the Port Arthur Historic Site Management Authority to develop the colonial heritage visitor experience across the state and region
- Develop a visitor experience around the southern most point of Australia at Cockle Creek (accommodation, walks, nocturnal)
- Franklin Foreshore – a gateway to the Far South showcasing boat building with accommodation, jetty, marine tourism, an expanded Wooden Boat Centre, rare heritage trades training and local food and wine experiences
- Regional accommodation of scale in the Huon Valley and Heritage Highway (Oatlands)
- Develop the Cape Bruny Lighthouse visitor experience and infrastructure
- Leverage the opportunities presented by The Hedberg (UTAS) and the MyState Arena (former Derwent Entertainment Centre) redevelopment
- Provision of sufficient RV friendly facilities and communities
- Sustainable tourism – carbon neutral destination, voluntourism opportunities (e.g. Derwent Catchment Project, hydro-electric scheme, electric vehicles and charging points)
- Inclusive tourism – an opportunity to better connect with visitors with special needs (physical, cultural and social), which represents a large proportion of the visitor market.
- Carbon neutral destination, leading with initiatives such as electric public transport and tour vehicles, electric hire cars, cycle tourism and sustainable tourism experiences (voluntourism).
- Gaining meaningful social license for new developments
- Continued uncertainty in tourism associated with pandemic
- Loss of market share
- Flight shaming and long distance international travel being less attractive to younger travellers
- Continued decline in workforce attraction and retention
- Lack of regional workforce accommodation
- Climate change induced events such as increased bushfires and floods
- Inadequate public funding to support high quality experiences, particularly in national parks
- Supply and demand pricing issues with hire cars
- Capacity issues for Bruny Island ferry
- Bureaucratic red tape hampering development



▲ Dark Mofo: The Burning. ABAM GIBSON



▲ The Neck, Bruny Island. JESS BONDE





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