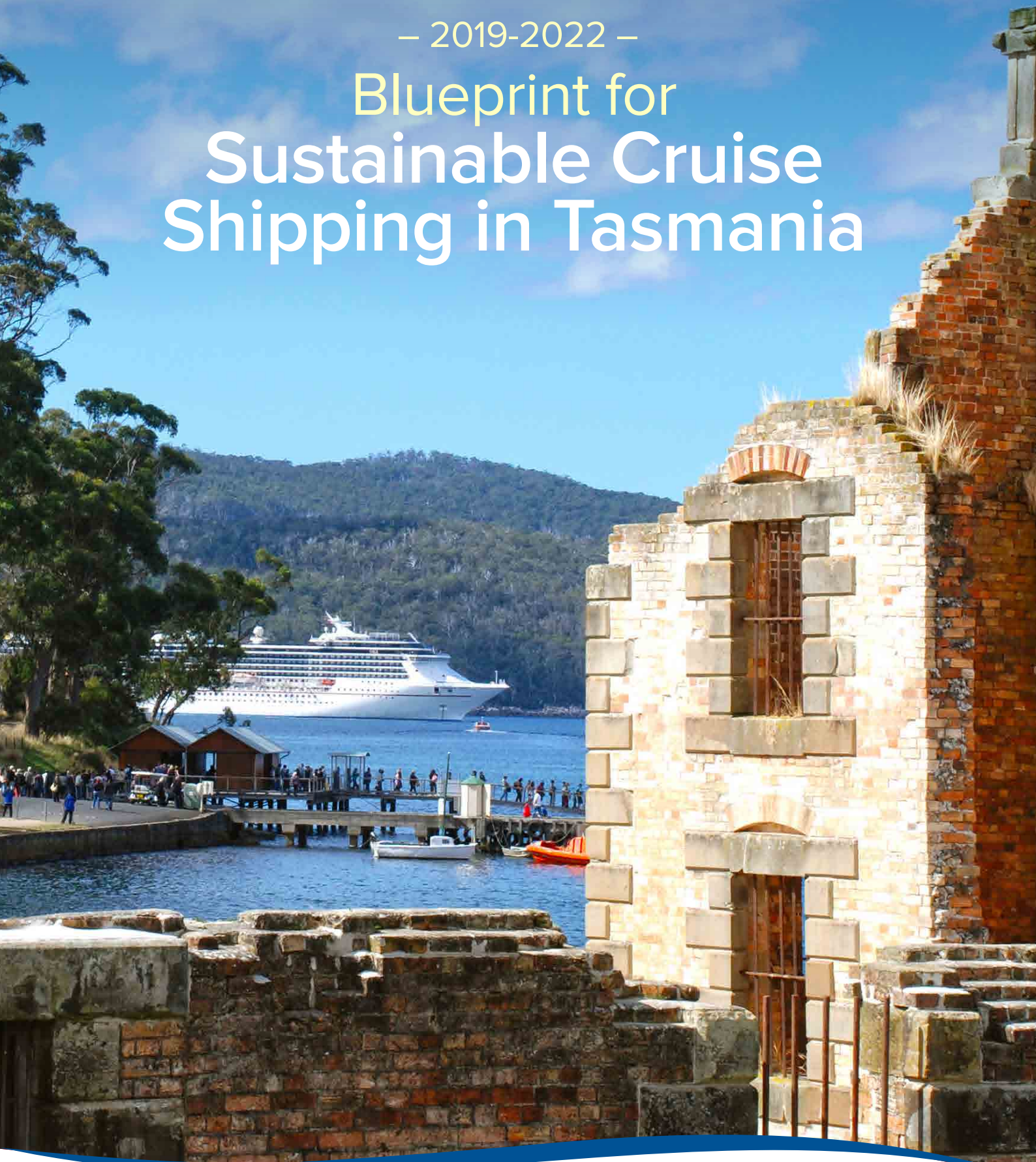
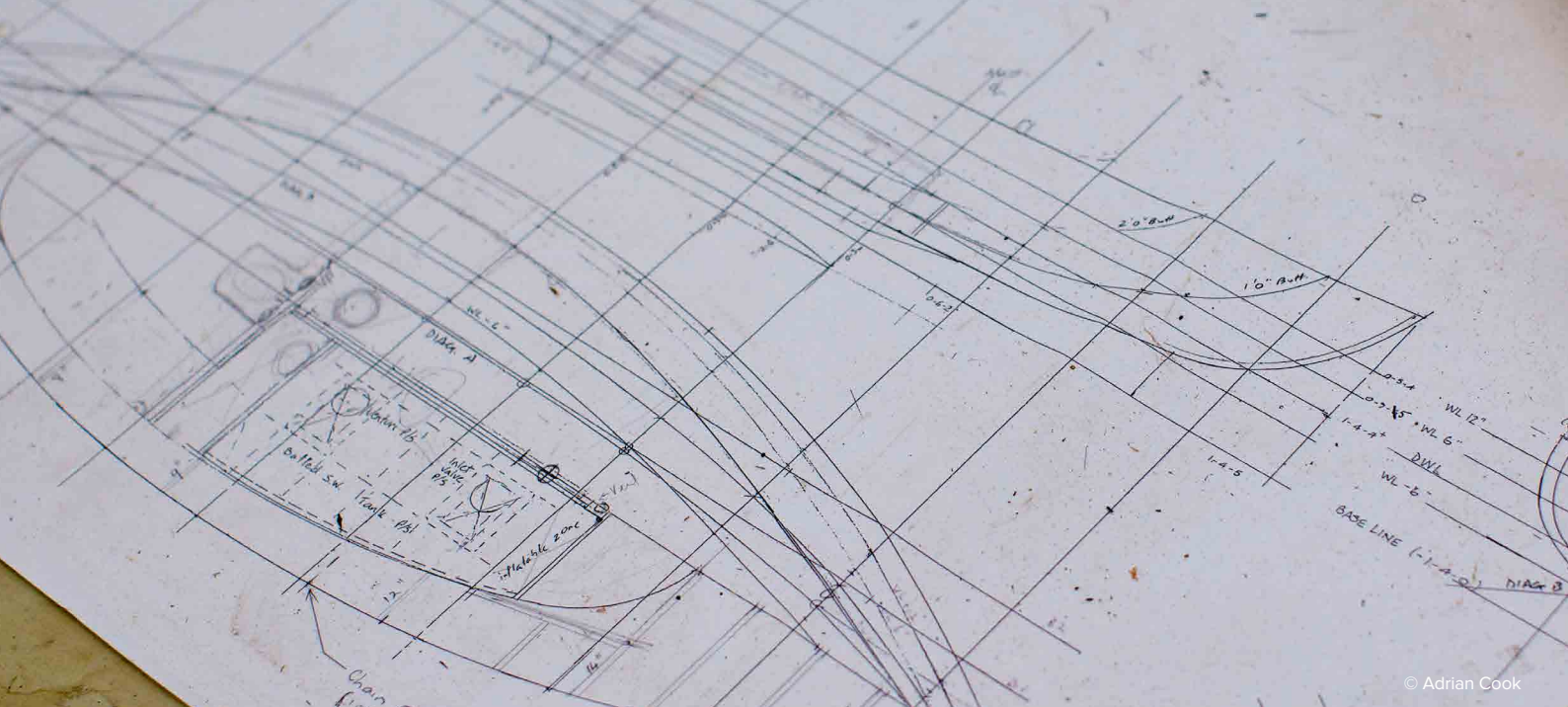


– 2019-2022 –

# Blueprint for Sustainable Cruise Shipping in Tasmania





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## Introduction

The future focus for the cruise sector in Tasmania will be on increasing yield and regional dispersal of cruise visitors, including an increase in the number of expedition ships calling at regional anchorages and a more dispersed shore program from the main ports.

Between 2012 and 2015, the number of cruise ship port calls in Tasmania averaged around 60 visits per year. Since then, port calls have grown to 135 with 175 000 unique cruise visitors expected in 2019-20.

The cruise market offers significant opportunities for the state. Tourism Tasmania estimates that cruise passengers spent approximately \$30.5 million in Tasmania during 2018-19. The Cruise Line International Association (CLIA) estimate that cruise lines contributed a further \$15 million in port fees, shipping supplies and other corporate expenditure into the Tasmanian economy over the same period.

However it is important that Tasmania takes a strategic and coordinated approach to the way it attracts and manages cruise shipping as a destination, ensuring it is sustainable, matched to each region's infrastructure and dispersed across the state.

This strategic management will be based on a set of sustainability principles which include;

- Managing the number of vessels and passengers in port at any given time through sequencing and influencing, where possible, the type and size of ship.
- Ensuring a wide dispersal of passengers to regional areas on day tours and shore excursions.
- Ensuring areas with environmental or community sensitivities are managed appropriately through cross government and stakeholder collaboration.
- Active pre and post season evaluation through the Cruise Stakeholder Group, chaired by Tourism Tasmania, reporting to the Access Working Group.

A 2018 review of cruise shipping in Tasmania showed the cruise industry to be as nuanced as other leisure tourism markets and identified four cruise segments relevant to Tasmania, these are: Expedition vessels which are characterised as carrying 100-300 passengers and generally looking for more remote experiences. Small luxury and Boutique vessels that general carry under 1 000 passengers and target high quality experiences. Mid-large size vessels which typically carry between 1 800 – 2 800 passengers across a diverse demographic range, and Mega ships that carry over 3 000 passengers at a time, requiring more significant port infrastructure which generally limits their visits to capital cities.

This review can be found at; <https://tourismtasmania.com.au/news/category/tourism-tasmania/tasmanian-cruise-market-update>



Cruise ship - MACq 01 © Sarajayne Lada

# Goals for cruise shipping in Tasmania

Learnings from the 2018 review coupled with the application of the sustainable principles outlined previously have contributed to goals, strategies and key performance indicators being identified for the next three years.

Goals	Key performance indicators
<p><b>Deliver sustainable cruise ship growth and maximise benefits to Tasmanian communities by increasing regional dispersal and yield of cruise visitors through:</b></p>	<p><b>Evaluate the sustainability of cruise ship growth and measure success in achieving the goals, by tracking the following indicators:</b></p>
<p>Actively managing growth in cruise shipping in Hobart, Burnie and Port Arthur, and encouraging passenger dispersal into Tasmanian regions.</p>	<p>Lift overall cruise passenger spend in Tasmania from \$30.5 million to \$50 million by 2022 and ensure sustainability principles are applied to cruise shipping in Tasmanian destinations.</p>
<p>Attracting small ships and expedition cruises to Tasmania’s regional ports and anchorages to increase dispersal of cruise passengers.</p>	<p>Grow the expedition segment into suitable regional ports and anchorages collaboratively with a Regional Anchorages Working Group.</p>
<p>Increasing yield from the cruise ship sector by growing onshore expenditure by passengers and provisioning expenditure by cruise lines to optimise economic benefits to the state.</p>	<p>Increase take-up of organised shore tours from 40% of cruise pax to 50% by 2022. (Source: Tasmanian Cruise Passenger Survey)</p> <p>Introduce turn-around visits for small ships and partial turn-around visits for large ships to five calls per summer by 2022.</p>
<p>Maximising the rate of repeat visits of passengers who return to Tasmania on holiday by ensuring high levels of visitor satisfaction by cruise passengers.</p>	<p>Grow the number of people who were influenced to return to Tasmania on holiday by a previous visit on a cruise ship each year from 10 960 in 2019 to 15 000 by 2022 (Sourced from TVS)</p>



Burnie Port © TasPorts

## How Tasmania will deliver on these goals

To deliver the cruise goals there are **3 strategic initiatives** that cruise stakeholders will work on over the next three years.

- 1. Convene a **Regional Anchorages Working Group**** to assess Tasmania's small ports and anchorages to establish under what circumstances these areas can be safely visited by expedition cruise ships. This will be a whole of government approach with input from Tasports, Parks and Wildlife, Marine and Safety Tasmania, EPA, Tourism Tasmania and the regional tourism organisations.
- 2. Present compelling business cases to cruise lines and shore excursion operators to secure longer ship stays in port, extended Tasmanian cruise itineraries, more overnight port calls, the introduction of turn around calls, increased specialty provisioning, data sharing and ongoing commitment to the voluntary Wineglass Bay policy.**
- 3. Increase yield and dispersal from Tasmania's shore program by growing the take up, dispersal and satisfaction of tours by working with both ship-sold programs and independent tour operators.**

## Actions commenced and completed

Following the 2018 review a number of actions have been completed, these include:

- The implementation of a voluntary policy that excludes all vessels of over 100 passengers from Wineglass Bay. A commitment has been received from all cruise lines to adhere to this policy for all future visits.
- An examination of the current shore program for Hobart, Burnie and Port Arthur has been completed, including consultation with shore excursion operators and Tasmanian tour and experience operators. This has provided the Cruise Stakeholder Group with specific recommendations to assist in increasing the take-up of both ship-sold and independent shore tours.
- A regular and operational review of the 2018-19 cruise season has been undertaken by the Cruise Stakeholder Group and planning has commenced for the 2019-20 season.

While this Blueprint has been in development, many of the actions contained within in have commenced or are part of ongoing work with cruise lines. A number of targeted cruise line famils have been hosted in Tasmania in the first half of 2019 and discussions have commenced with other Australian States on national alignment of cruise data sources.

The Regional Anchorages Working Group will build on existing cross agency work already underway in response to a number of cruise line enquiries about regional destinations. The relevant stakeholders have been invited to the group's first meeting in August 2019.



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## Collaborative Actions 2019 – 2022

1. Regional Anchorages Working Group	2. Relationships and Influence	3. Shore Program Development
<b>Tourism Tasmania will be the coordinating agency with Taspots, MAST, PWS, EPA and RTOs to:</b>	<b>Tourism Tasmania will be the lead agency to:</b>	<b>Tourism Tasmania will be the lead agency to:</b>
Establish the working group by July 2019	Retain Australian Cruise Association membership and encourage appropriate Tasmanian representation on the board and continue engagement with decision makers on cruise itinerary development.	Assess the current shore program with Shore Excursion Operators (Shore Ex) to identify regional opportunities for dispersal of passengers.
Develop a framework consideration set to assess cruise ship visitation at identified regional ports and anchorages by November 2019	Host itinerary planners, cruise line provisioning and supply managers on familiarisation visits to strengthen connections with Tasmanian suppliers.	Coordinate with RTOs on hosting Shore Ex familiarisations to connect with cruise ready tourism operators.
Prepare an assessment for each of the eight known regional ports and anchorages by November 2020	Work with national organisations on the alignment of cruise data sources.	Supply brand aligned destination content and imagery to cruise lines to improve sales portals.
Ongoing implementation of the framework assessment for any future proposed ports or anchorages.	Engage with cruise lines to ensure continued compliance with the voluntary Wineglass Bay policy.	Work with stakeholders to improve quality and availability of local tour guides for cruise ships.
	Establish a critical incident communications plan with Shore Ex partners.	Conduct post-season reviews to measure tour success and define opportunities for next season.
	Conduct a Cruise Passenger Survey over the 2019-20 cruise season and share the results with ACA and CLIA.	Work with RTOs and industry to increase capability and success of independently sold tour product.
	Work with CLIA to establish a provisioning value benchmark for Tasmania in 2019-20 to enable ongoing measurement.	Develop a register of regional ambassadors able to go on-board and engage with passengers on the stories and produce of Tasmania's regions and drive take up of tour program prior to arrival in port.



## Priority actions by destination – Regional Anchorages

The priority action for Tasmania’s regional anchorages is the establishment of a cross agency working group to enable efficient management of a growing number of expedition ship requests for regional areas.

The working group will articulate an assessment process that considers safety, environmental impact, community impact, shore program potential, economic impact and appropriate resourcing. The framework will consider both marine side and land side operations for small and expedition style vessels and will look at visitation frequency, timing and overall passenger numbers.

There is strong interest from expedition lines (100-350 passengers) to develop alternative east coast anchorages to Wineglass Bay. Promise Bay, Bicheno, Swansea and Maria Island are all priorities for assessment. This may provide alternative options for existing bookings supporting the voluntary Wineglass Bay policy in the long term.

Other priority locations for assessment are those that have been identified as the areas of interest with small cruise ship operators. They include: Flinders Island, King Island, Bruny Island and Stanley.

# Collaborative priority actions by destination

## – Main Ports

Port	Relationships and influence	Shore Excursion programs	Other
<b>Hobart</b>	<p>Work with cruise lines to sequence visits to minimise days where multiple cruise ships are in port.</p> <p>Progress discussions with cruise lines to secure more overnight stays in Hobart, longer Tasmanian itineraries, turn-arounds and increased specialty provisioning.</p> <p>Work with lines to increase the hours in port. Vessels that stay over 10 hours allow for full day tours to the outer regions.</p>	<p>Develop a produce inspired program that links shore experiences with provisioning opportunities.</p> <p>Develop familiarisation program to facilitate engagement between Shore Ex operators and Tasmanian tourism businesses.</p> <p>Improve pre-season collaboration of licensed hawking operators to increase take up of independent tours.</p>	<p>Develop a more comprehensive visitor hub within the cruise terminal.</p> <p>Improve passenger flow around the waterfront and city centre, through signage and information.</p> <p>Broaden welcome activities to include other sectors such as arts, agriculture and education to engage passengers in Tasmanian stories.</p>
<b>Burnie</b>	<p>Work with cruise lines to sequence visits to minimise days where multiple cruise ships are in port.</p> <p>Offer local on-board ambassadors prior to arrival to engage with passengers on the region's stories and produce.</p> <p>Engage with cruise lines to include Burnie in more itineraries and increase the length of time spent in the port to enable full day tours.</p>	<p>Increase dispersal of the shore program from Burnie by working with industry to pitch itineraries to Shore Ex companies and by providing a familiarisation program.</p> <p>Promote regional centres such as Stanley, Wynyard, Penguin and Devonport for inclusion in shore tour programs.</p>	<p>Burnie Council to promote the cruise ship schedule to increase awareness in the community and among retailers.</p> <p>Develop mechanisms for producers and artists to better engage with passengers.</p> <p>Improve pick up process for pre-booked independent tours.</p>
<b>Port Arthur</b>	<p>Progress discussions with cruise lines on the inclusion of Port Arthur in existing Hobart itineraries in the small luxury segment.</p> <p>Engagement on the timing of calls. Encourage afternoon arrivals allowing for a spread of visitation across the day and provide passengers with more exclusive tour experiences while avoiding peak days will assist with managing capacity at Port Arthur Historic Site.</p>	<p>Investigate options for a hop-on hop-off style service between the region's attractions and day walks.</p> <p>Create overnight packages with ghost tour or night time experience with food and accommodation.</p> <p>Provide a diversity of experiences in tailored packaging or organised tours for attractions available within 30 mins of Port Arthur.</p>	<p>Invite local artists to establish an arts market at the historic site during cruise ship visits.</p> <p>Through the RTO offer an industry program for operators focussing on collaboration and information about how to work with the cruise industry.</p>
<b>Beauty Point</b>	<p>Promote Beauty Point to small luxury cruise lines.</p>	<p>Develop a targeted familiarisation program to facilitate engagement between Tasmanian tourism operators and Shore Ex companies.</p>	<p>Development and consideration of wharf upgrade business case.</p>



Burnie Port © TasPorts

## Supporting cruise shipping goals through enhancements to cruise infrastructure

Tasports maintain and invest in cruise infrastructure as part of its overall port management and long-term port infrastructure planning programs.

Tasports is preparing the following business cases for potential infrastructure improvements in response to growing demand and the importance of dispersing visitors across Tasmania.

**Beauty Point** – Investigations are underway into infrastructure works required to upgrade the existing wharf to be able to berth small luxury ships up to

240m in length. This class typically carries less than 1,000 passengers. Demand from the cruise industry is establishing for cruise ships to call at Beauty Point.

**Burnie** – Infrastructure planning to accommodate the growing cruise ship demand at Burnie is underway, in accordance with TasPorts' master planning for the Port of Burnie. Investigations are aimed at establishing a designated cruise ship berth with the purpose of reducing impacts on other commodities and industries reliant on dedicated berths at the port. Along with the berth business case, a solution is required to better connect passengers to the city centre.

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## Blueprint governance

The Cruise Stakeholder Group and the Access Working Group will continue to oversee the implementation of these actions and report progress through the T21 process.

The cruise stakeholder group is comprised of representatives of; Tourism Tasmania, Tasports, each of the regional tourism organisations, Hobart City Council, Burnie City Council, Port Arthur Historic Site and the Tasmanian Travel and Information Centre.

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