



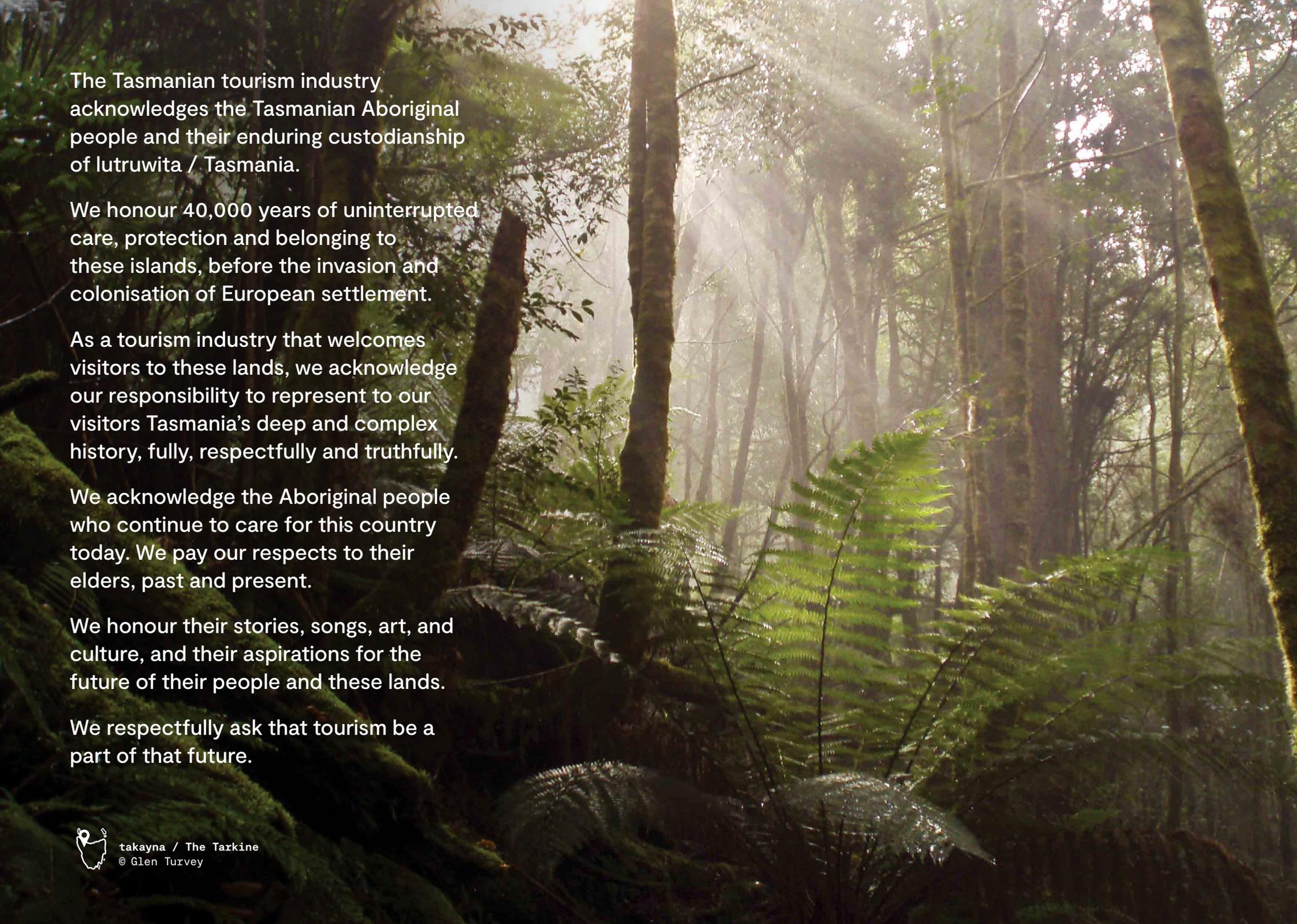
T21 Visitor Economy Action Plan

2020-2022



Tourism Industry Council Tasmania





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.



Foreword

The start of the new decade will forever be remembered as the toughest our tourism and hospitality industry has endured.

Heading into 2020, our industry was the envy of the nation following years of growth in visitors, product development and reputation.

Today, we are not where we thought we would be. As we release this Action Plan, we continue to face great uncertainty caused by circumstances beyond our control. What we can control is our response to that uncertainty in protecting the health and safety of Tasmanians, and to shield our economy from the threat of another shutdown caused by a second wave of COVID-19. Our tourism and hospitality industry continues to be the hardest hit by the necessary restrictions we have imposed, particularly in relation to borders. This impact may continue with the economies of our largest source markets currently under stress.

We are supporting our operators to survive in the immediate and short term. This Action Plan commits to a set of initiatives over the next two years, to be reviewed regularly. The agility in how we respond to the changing environment is critical. It is a testament to the T21 partnership that we have become the first state to release a plan of this kind in the midst of COVID-19. Our commitment is that we will continually reshape and adapt our response, while giving our industry as much certainty as possible. The T21 Visitor Economy Action Plan is our first step.

The tough times that confront us will not last forever. We will adapt and renew and that is why the Action Plan has been guided by the longer-term aspirations identified through the extensive consultation in 2019 to inform our 2030 vision.

We will not shy away from having a bold and ambitious vision for our visitor economy, despite the current adversity — a future where tourism and hospitality continues its important contribution to the social and economic fabric of Tasmania and our people.



A handwritten signature in black ink, appearing to read 'P. Gutwein'.

Hon. Peter Gutwein MP
Premier of Tasmania
Minister for Tourism

Over 25 years, the Tasmanian tourism industry has worked with the State Government through our Tourism 21 partnership in shaping Tasmania into the world-class visitor destination it is today.

Together, we have created economic opportunity and tourism jobs throughout the community, strengthened Tasmania's brand and, ultimately, fostered a greater sense of local pride in what makes Tasmania unique.

We entered COVID-19 with steady growth in visitor numbers and spending, award-winning tourism operators, and an exciting pipeline of new investment in both public and private visitor infrastructure across the state. This gave us the confidence to confront the challenges to our long-term prosperity and success as a visitor destination — building a skilled local workforce, maintaining the infrastructure our visitors and locals expect, responding to the threat of climate change, and ensuring our Tasmanian tourism industry is sustainable.

The plan is a step to an ambitious pathway of recovery from the ravages of the pandemic — to rebuild the value of tourism to Tasmania as quickly as possible, while laying the foundations for our future as a global leader in responsible tourism.

This will not be easy, and the world today is a very uncertain place. But we have proved in Tasmania that when industry and government work strategically together with a common set of priorities, our tourism industry is as well placed as any to emerge from the pandemic stronger, more resilient, and confident about its future.



A handwritten signature in black ink, appearing to read 'D. Leesong'.

Daniel Leesong
Chair
Tourism Industry Council Tasmania

Introduction

We are proud of Tasmania — our people, our culture, our produce, our environment and our way of life. Our tourism represents the very best of who we are and what we represent.

We welcome visitors to these islands with a deep sense of responsibility to honour and maintain what is special about this place.

By working together, we built a successful tourism industry and a vibrant visitor economy through innovation, passion and a deep love for our home state.

COVID-19 has shaken our industry to the core. But it will not beat us.

Against a backdrop of rapidly changing circumstances, we believe we must set a pathway to move through this time and get back on our feet.

We are agile in responding to the current uncertainties, but understand we must also take the long view. We don't want to recover what was lost. We want to build an even better form of tourism for Tasmania.

This Action Plan is our first step towards certainty.

Once again, government and industry will work together over the next two years, rebuilding tourism as a pillar of our state's economy and community. We are all accountable.

We strive to be a destination renowned world-wide not just for authentic visitor experiences, but also for our commitment to sustainability and community.



Roaring 40s Kayaking, Tasman National Park © Sean Scott

A destination that invests in its people and strives for innovation and quality in all that we do.

A tourism industry that responds to the risks of a changing climate.

Tourism that provides meaningful opportunities for Tasmanians, supporting destinations where the locals welcome visitors.

Tourism for Tasmania.

Tasmania as a global leader in responsible and sustainable tourism

In late 2019 we started planning for the next 10 years of tourism in Tasmania. More than 500 industry and visitor economy stakeholders met in 18 workshops around the state where they identified a common vision where our industry is more deliberate in its agenda for responsible and sustainable tourism, holistically, environmentally, culturally, economically and at a community level.

Now our first priority is rebuilding businesses, supporting Tasmania's tourism and hospitality operators and our workforce.

Despite the pandemic, our ambitions remain relevant, some might say even more relevant.

In shaping our recovery over the next two years we are determined to realise our longer-term vision to be a global leader in responsible and sustainable tourism. We also understand the structure of tourism in Tasmania will need to adjust to changing needs and our long-term aspirations.

This means we are prioritising initiatives that are just as important in recovery as for the longer term.

OUR LONG-TERM ASPIRATIONS:

- » Growing visitation to Tasmania that is economically, environmentally and socially sustainable.
- » Putting our regional towns and destinations at the heart of the Tasmanian visitor experience.
- » Growing a skilled Tasmanian tourism workforce.
- » Supporting Tasmanian Aboriginal People in sharing culture and history.
- » Fostering Tasmanian creativity and entrepreneurialism.
- » Positioning Tasmanian as a global example of sustainable tourism.
- » Responsible stewardship of our protected areas.
- » Telling the Tasmanian story and celebrating who we are.
- » Economic, profitable and sustainable businesses.
- » Putting community at the heart of the future of our destinations.
- » Fostering diversity and the next generation of industry leaders.

The pathway to recovery

This Action Plan is built around a simple, shared goal: to restore the value of tourism to the Tasmanian economy and for the benefit of the community as quickly as possible.

In striving towards this target, we will also prioritise the steps we need to build Tasmania's future as a sustainable visitor destination for the next decade and beyond.

We do this knowing that our outlook remains highly uncertain and volatile. There are factors beyond our control directly influencing our recovery.

We know the strength and pace of our recovery will be shaped as much by events in other parts of Australia and across the globe, as anything we can do as Tasmanians.

We accept tourism and travel has probably changed forever, with all destinations having to respond to a new reality.

But Tasmania went into the pandemic in a very strong position. That gives us confidence we can respond to this uncertainty as well as any destination.



Ship Inn, Stanley
© Marnie Hawson

Tasmania has a strong tourism brand with wide market appeal. Many Australians are eager to travel interstate once borders re-open, and Tasmania ranks highly as a destination and as a substitute for Australians who had planned international trips.



TASMANIA'S TOURISM BRAND IS STRONG

Tasmania's tourism brand is strong and remains competitive compared to peers (Tourism Info Monitor, Tourism Tasmania Q1 2020)



TASMANIA IS A HIGHLY-SOUGHT AFTER DESTINATION

Tasmania rates highly as the next place to visit for our target market (Urban List, May 2020)



TASMANIANS WANT TO EXPLORE THEIR BACKYARD

68% of Tasmanians are planning a holiday in Tasmania in the next 12 months (EMRS, May 2020)



AUSTRALIANS ARE EAGER TO TRAVEL

74% of Australians are more likely to holiday in Australia than pre-COVID-19 and 50% intend to holiday for at least a week (Urban List, May 2020)



TASMANIA IS PERCEIVED AS A SAFE DESTINATION

Tasmania has a solid reputation as being a safe place, with low numbers of COVID-19 infections compared to other states.

The challenges we face

ACCESS TO INVESTMENT FINANCE

COVID-19 has depleted operators' available capital, lenders are tightening credit conditions and reducing access to finance, and foreign direct investment flows have significantly decreased.



COMPETITION FROM OTHER DESTINATIONS

The domestic tourism market is experiencing increasing competition, with a shift in focus from international to interstate and intrastate visitors.



AIR ACCESS ROUTES AND CAPACITY

Travel restrictions and the resulting lower demand for travel have led to reduced aviation capacity into the State. Future capacity will be demand-led, creating uncertainty around the timing and pace of return to pre-pandemic capacity.



POTENTIAL REDUCED TRAVEL SPENDING

The economic crisis has led to higher unemployment and reduced household income. This is expected to impact level of spending on travel.



OUR CHALLENGES



PRODUCT AVAILABILITY

Tourism operators are facing severe reductions in income as a result of travel restrictions and physical distancing measures, with some operators delaying their reopening or limiting their offering, with others potentially closing permanently.



DISRUPTION OF COVID-19

COVID-19 has significantly disrupted some of key demand drivers through social distancing measures and change in behaviour, particularly in the events and business events markets.

SEASONALITY OF DEMAND

Tasmania experiences strong seasonality of demand, with winter months typically drawing much smaller visitor volumes compared with warmer months.



CONSUMER SENTIMENT FOR TRAVEL / AIR TRAVEL

Consumer confidence and willingness to travel, including air travel, will take time to rebuild. Some may prefer local holidays or defer travel.



PRICE COMPETITION

Domestic destinations are actively offering discounts and promotions to entice customers, creating significant challenges in attracting the interstate market.



Milestones on the road to recovery

There are critical milestones on the path to restoring the value of tourism to the Tasmanian community.



Cape Wickham Lighthouse, King Island © Dietmar Kahles



» Encouraging Tasmanians to *'Make yourself at home'* and activating our intrastate market potential.



» The gradual re-opening of our interstate markets as restrictions are eased when public health advice says it is safe to welcome visitors back to our state. There will be pent-up demand for visiting friends and relatives and domestic travel during school holidays.



» Demand-led restoration of our aviation network, including direct services to our major domestic markets.



» Resumption of our business events and major events sectors.



» The opportunity of a trans-Tasman travel bubble and a direct air service between Tasmania and New Zealand.



» Positioning Tasmania for the return of international visitors.

Our scenario for recovery

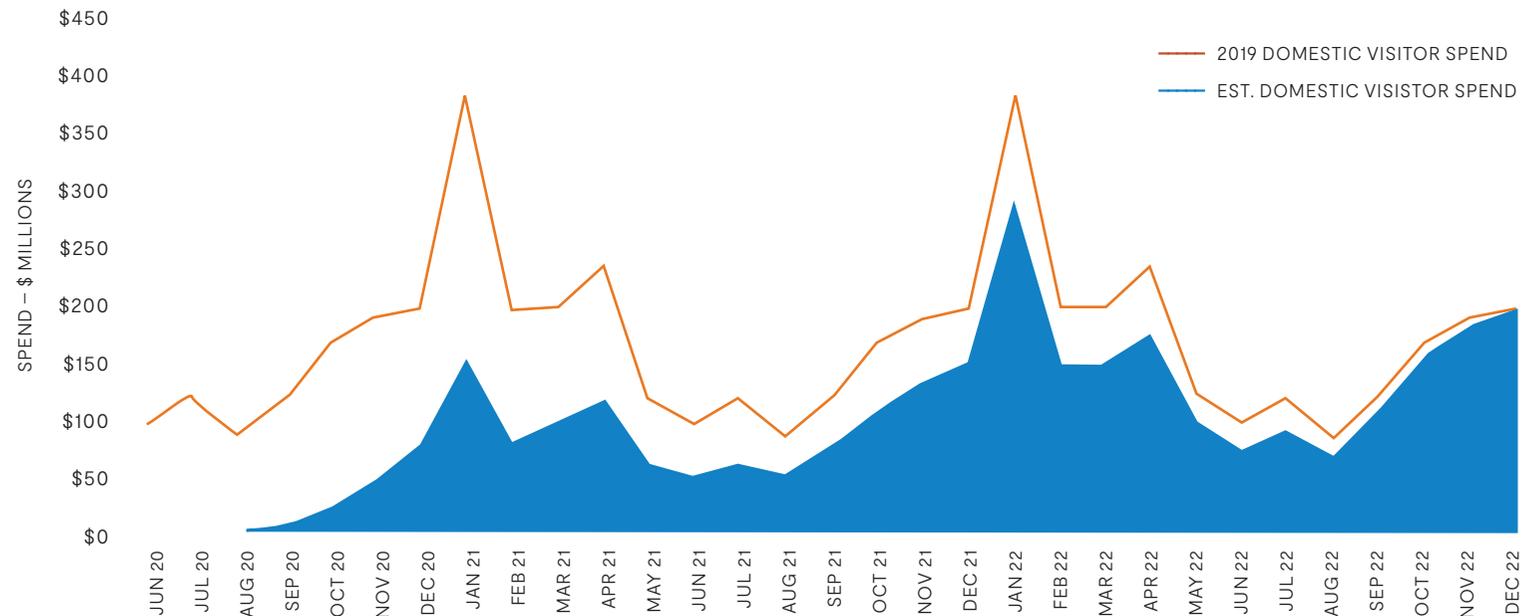
In responding to the challenges, and strategically driving our recovery priorities, we will strive to restore the value of visitor spending in Tasmania to \$2.5 billion by the end of 2022.

We anticipate our market will recover steadily over the next two years, tracking the demand path we were on before the pandemic.

However, forward demand will be influenced by border restrictions and consumer sentiment in a highly fluid and uncertain environment. There are multiple scenarios for our future and we will therefore need to be agile, creative and innovative. We have estimated a scenario for recovery at this point in time, and this will allow us to track progress to our goal.

VISITOR SPEND

Estimated spend per month compared to same month in 2019



Our goals and priorities

To ensure Tasmania is ready for these opportunities as they emerge, our priorities over the next two years are to restore air and sea access, rebuild visitor demand around core strengths as a destination, and support our people, our industry and our workforce.



Delamere Vineyards © Adam Gibson

We are ambitious in our goal to grow the value of tourism to Tasmania:



» 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.

A woman with long dark hair, wearing a bright yellow jacket, is laughing joyfully with her head tilted back. She is standing in a misty, forested landscape with tall grasses and scattered rocks. The background shows a dense forest of trees under a grey, overcast sky.

TASMANIA

COME DOWN FOR AIR



Mt Field National Park
© Adam Gibson

Our brand has never been more relevant

Our island at the edge of the earth is in the midst of a transformation. It's a rags to riches story that has shaped Tasmania as a passionate island of creators with quietly growing confidence. Tasmanians find and create meaning in what we do, and in preserving the substance of our beloved state.

Our source is what surrounds us: clean air and water, uncommon land, mountains and wilderness. But in this state, we are what we create — and good enough is never enough.

People come to Tasmania to be a part of this island's cultural transformation, to change their own lives in some small or large way. What they find here is soul-enriching, a counterpoint to the digitisation and isolation of the modern lifestyle. Tasmania is raw, beautiful and honest, allowing you to connect outwardly to the environment and community, or inwardly through self-reflection.

Whether connecting with wilderness, with yourself or with others, be what you were designed to be. When everywhere can feel generic, feel more human on an island of difference.



Natural beauty that reminds you of your place in the world



Casual, down-to-earth people that have time for you



A place that lets you feel off-grid, without being remote



A thriving arts and culture scene to awaken your creative spirit



A community vibe that awakens your convivial side



World class produce where you can still talk to the owner



A pace of life that gives you time to let everything seep in



An offbeat quality that is definitely not mainland

Priority 1: Rebuilding Visitation

We are confident Tasmania is well positioned in a world where people are feeling uncertain, more constrained and want to get back to something real.

Remaining true to who we are and what we offer is the linchpin for our recovery.

It is more important than ever to understand our changed market and our consumers. We must not assume that what we knew before remains true.

To restore the value of tourism to Tasmania by the end of 2022, we will double-down on our competitive strengths as a visitor destination.

To support our demand generation and visitor experience in recovery we will focus on several key areas.

- » Tasmania's natural environment.
- » Our home-grown festivals and events.
- » Drive holidays and Tassie road trips.
- » Uniquely Tasmanian operators and experiences.
- » Playing to our creative strengths.

Underpinning these areas of focus is a whole-of-state destination marketing strategy supporting our highly desirable brand proposition.

WE WILL

- » Grow demand through a single, integrated demand plan across all key demand drivers — leisure, business and events — and leveraging market opportunities.
- » Invest in research to deepen our understanding of the changed market and customers.
- » Plan agile market engagement as they re-open.
- » Re-enter the domestic market with phase 2 of the *Tasmania - Come down for Air* brand campaign.
- » Launch a drive/touring marketing program and associated five drive journeys to support regional visitation.
- » Re-enter the New Zealand market with a campaign to drive visitation to Tasmania.
- » Partner with Tourism Australia on its Holiday Here this Year campaign to showcase Tasmania in the interstate market.
- » Maintain connection with other key international markets to prepare for the easing of Australian border restrictions.
- » Promote hero experiences, including those in our Unordinary Adventures Program, focussed on passion travel e.g. walking, mountain biking, golf and fly fishing.
- » Grow visitation to our Bass Strait islands through incorporation in campaigns and other activities that drive demand to these locations.
- » Optimise Tasmania's digital marketing assets and tools to provide a better online experience for visitors, improving customer engagement before, during and after their travels.

Rebuilding Visitation:

TASMANIA'S NATURAL ENVIRONMENT

Tasmania's rare and beautiful landscape, recognised globally as the foundation of our brand, is why so many visitors come here.

When Australians look to reconnect with nature and escape the uncertainty and challenges of urban life, Tasmania is a refuge. It is our competitive advantage over other Australian destinations.

Our natural heritage draws visitors to Tasmania and across the island. The Tasmanian Wilderness World Heritage Area, national parks and reserves are the major visitor attractions into regional Tasmania, underpinning local visitor economies.

Tasmania's nature will always underpin our destination marketing activities and is at the heart of our *Come Down for Air* brand.

Our outstanding nature tourism operators are among the best in the world, and our reputation for walking, mountain biking and water-based experiences underpins our visitor economy. To support this brand, we will continue to invest in infrastructure that enables visitors to experience our natural environment safely and sustainably. We will also support our operators to offer innovative and responsible products and experiences within our natural environment.



Cradle Mountain Visitor Centre, Cradle Mountain-Lake St Clair National Park
© Cam Blake

WE WILL

- » Progress masterplan investments in visitor infrastructure at our iconic Cradle Mountain and Freycinet National Parks.
- » Complete stage 3 of the Three Capes Track (day walks at Cape Raoul, Shipstern Bluff, Crescent Bay/Brown Mountain) and pursue the realisation of Tasmania's next Iconic Walk on the West Coast.
- » Finalise the Maria Island Rediscovered Project and enhance camping facilities on the East Coast.
- » Initiate priorities in the Tasmanian Wilderness World Heritage Area Tourism Master Plan.
- » Support appropriate and responsible commercial visitor activities and investment within Tasmania's national parks and reserves.
- » Maintain the highest standards and expectations for commercial tourism operators providing experiences within our protected areas.
- » Focus on niche markets that seek nature-based experiences through the Unordinary Adventures program.
- » Promote the experiences and natural values of our parks and reserves through a collaboration between the Tasmanian Parks and Wildlife Service and Tourism Tasmania.

Rebuilding Visitation:

OUR HOME-GROWN FESTIVALS AND EVENTS

We are bold, different and quirky, reflected in the hundreds of home-grown events and festivals that tell the story of our culture, our place and our people.

Pre-COVID-19, Tasmania's event scene was humming.

Our business events market was showing strong signs of growth. The pandemic disrupted this momentum and created a challenging environment for events.

Our job now is to do what we've always done — work hard, against the odds, to emerge with a different events proposition.



Home Hill Winery © Nick Osborne

WE WILL

- » Support our iconic Tasmanian events to adjust to COVID-19.
- » Provide grant assistance to events proposed for 2021 to implement COVID-19 safe practices.
- » Provide support in attracting participation-led events with potential to fill out the demand in regional and urban areas across all seasons.
- » Support intrastate movement during 2021-22 through a small-grants program to encourage events, primarily involving overnight stays.
- » Encourage the development of innovative and new event opportunities with potential to be held in 2021-22.
- » Prioritise actions that support intrastate business events.
- » Use the Business Events Attraction Fund to be competitive in attracting business events.
- » Develop options to enable operators to adapt their products and experiences to support business events.
- » Target businesses events that are rescheduling international programs.
- » Focus on the corporate incentives market as the business events market adjusts.
- » Develop a business events digital solution for destination market promotion to drive pre and post touring.
- » Pursue the opportunity to access the New Zealand corporate market as part of the proposed travel bubble and direct flight opportunity.
- » Prioritise strategic investment in events venues in Hobart and Launceston, including the upgrade of the Derwent Entertainment Centre at Glenorchy and the upgrade of the Albert Hall in Launceston.

Rebuilding Visitation:

DRIVE HOLIDAYS AND TASSIE ROAD TRIPS

Drive holidays are back in vogue. In the current environment we know that Australian travellers are going to be more inclined to travel in their car or fly-drive.

Tasmania has always been one of the great drive holiday destinations and touring regional destinations underpin our visitor economy.

There is a huge opportunity to increase our share of a growing market that we know travels further, stays longer and spends more. We are a compact destination with an extraordinarily diverse range of experiences and natural landscape easily accessible from key entry ports. We are making investments and working together now to position Tasmania as the premier road trip destination.



Spring Beach, Orford (Maria Island in distance) © Lisa Kuilenburg

WE WILL

- » Launch a compelling program to position Tasmania as the leading road-trip destination.
- » Launch the Tasmania's Drive Journeys.
- » Deliver Tassie's Top Tourism Towns Program.
- » Co-invest and align marketing activities around Tasmania's destination brand as part of a coordinated strategy between Tourism Tasmania and TT-Line.
- » Stimulate demand for Spirit of Tasmania services through incentives to support additional sailings to meet demand.
- » Invest in the road network in Tasmania to support the touring market and visitation to regional communities.
- » Prepare for the opportunity created by the two new Spirit vessels by:
 - » Undertaking a demand assessment for the caravan and camping market for Tasmania.
 - » Mapping existing public and private supply of infrastructure and services for the caravan and camping market.
 - » Investing in a strategy that identifies gaps and opportunities to meet the market potential and realise our ambition to be Australia's leading touring and carbon-neutral destination.
 - » Collaborating to create a Tasmanian gateway visitor experience at the Port of Geelong.

Rebuilding Visitation:

UNIQUELY TASMANIAN OPERATORS AND EXPERIENCES

Tasmania's tourism and hospitality operators generate the innovation, the experiences and character that brings Tasmania to life for our visitors.

They are the ones who make the investments and create the jobs that build our visitor economy and support the Tasmanian way of life.

Our leading tourism operators are among the most awarded in our nation. They share their stories and their love for Tasmania through exceptional products and life-changing experiences. They also deliver our brand and help draw visitors to the state and into regional communities.

Our hospitality operators delivering Tasmanian food and beverage experiences and accommodation in all corners of Tasmania are the backbone of our visitor economy.

To recover our visitor demand quickly, we must also support and celebrate those products and experiences our visitors seek, from tours to attractions and beyond.

Our recovery priorities are focussed on practical actions that ensure our business owners have the means and measures to come through recovery and beyond to innovate and develop products and experiences that showcase the Tasmanian brand.



WE WILL

- » Support and champion quality tourism operators that enhance our brand through prioritising marketing assistance, industry development support, advocacy and other assistance.
- » Continue to invest in industry-led customer service enhancement, tourism accreditation and quality assurance and awards programs to maintain and elevate industry standards and the visitor experience.
- » Champion entrepreneurialism and innovation in new products and experiences that reinforce and enhance our core brand proposition and competitive strengths.
- » Support emerging sectors around greater cross-sector collaboration and specific development initiatives.
- » Maintain focus on tourism as a priority area for attracting investment and working with proponents to support new projects and address barriers.

Far left: Southern Wild Distillery © S. Group
Left: Sawyers Bay Shacks © Luke Tsharke
Right: Bruny Island Cheese Co. © Rob Burnett

Rebuilding Visitation:

PLAYING TO OUR CREATIVE STRENGTHS

One of the great successes of the past few years has been the emergence of an artisan produce sector and innovators who are winning global fame.

We have a pipeline of investment in small-batch produce, whisky and gin distilleries, cellar doors, cheese, and truffles, and growing interest in traditional practices, including fermentation.

Tasmania's reputation as a tasting and foraging destination is at a new level. It is now a competitive strength of our brand and a major reason visitors choose to come to Tasmania.

The cultural and creative industries are a key driver in our economy as well as attracting people to visit. For many visitors the state's strengths in creativity, history and food culture in combination form a large part of our appeal as a destination.

It is critical that we do not lose momentum in this sector and we will foster collaboration to enable product development.



WE WILL

- » Focus on signature food and beverage experiences that present contemporary Tasmanian cuisine.
- » Feature brand-aligned artisan products across all regions as a key driver of regional dispersal.
- » Activate Tasmania's emerging competitive strengths in artisanal and boutique/small-batch products and experiences by working with producers and growers on tourism opportunities.
- » Leverage Tasmania's premium brand with a program to develop service excellence and premium quality in what we make and do, with a particular focus on regional communities.
- » Implement the Tasmanian agri-tourism strategy, including helping businesses engage with agri-tourism, reduce barriers that constrain the development of agri-tourism and drive investment in new experiences.
- » Work with Brand Tasmania and tourism partners to provide access to cultural and creative products and experiences that are distinctly Tasmanian.
- » Provide support and assistance to enable Tasmanian business to more easily connect with and purchase Tasmanian cultural and creative products and experiences as part of their offerings.
- » Implement the Reel-Scout locations database to attract national and international film and television productions to Tasmania.
- » Launch Tasmanac, a platform that connects Tasmania's cultural collections and encourages dispersal to our regional towns.

Priority 2: Restoring access

As an island destination, air and sea access will always be the lifeblood of Tasmanian tourism.

Over the past two decades we have enjoyed increased air services and direct routes. We had a growing visitor economy as a result and Tasmanians enjoyed greater travel options at more competitive prices.

The ongoing challenge of COVID-19 must be confronted as we restore access to our state. Ensuring Tasmanians continue to have confidence in our border-control health measures will be paramount in the years ahead, along with keeping our visitors safe and well.

Restoring our aviation network as quickly as possible will be critical as the tourism industry and state recover. This will not be easy. The aviation industry is experiencing its greatest global crisis and competition for air capacity will be intense as all states seek to support their own recovery.

Demand will drive recovery. Our brand is strong, and Tasmania is a proven performer for aviation carriers. We are well placed to recover our aviation services as quickly as any Australian destination, subject to the shape and strength of the aviation sector itself.

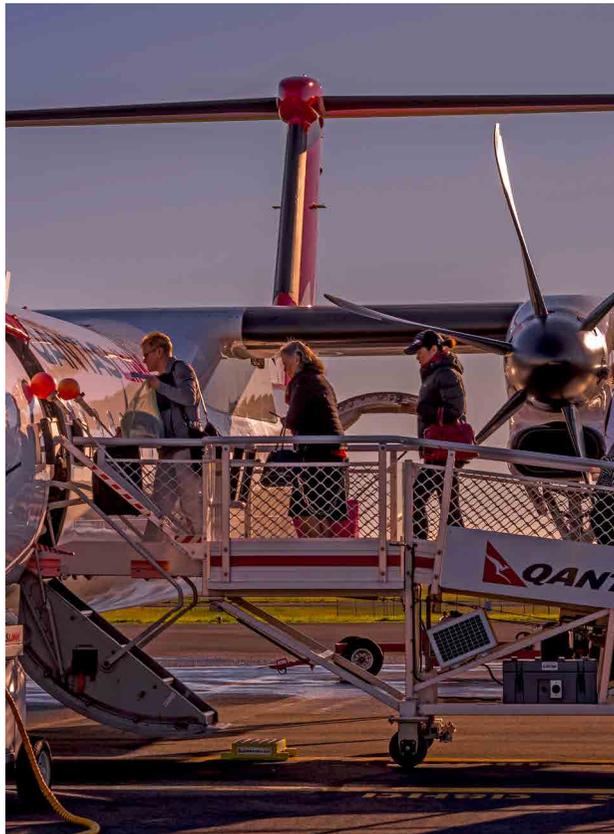
In recent years, TT-Line has also achieved record passenger numbers and will be an essential enabler for recovery. Visitors who travel on the Spirit of Tasmania ferries stay longer, spend more and travel further than those who travel by air. Our state-owned ships are a point of difference for Tasmania. Heightened health and safety concerns of travellers is likely to result in a shift to touring holidays and a dedicated touring campaign will position Tasmania well, along with our investment in roads to support regional access.



© Courtesy of Spirit of Tasmania



© Courtesy of Launceston Airport



Devonport Airport © Courtesy of TasPorts and Rob Burnett

WE WILL

- » Re-establish our network of core routes between Hobart, Launceston, Melbourne, Sydney, Adelaide and Brisbane and work with carriers to increase frequency and capacity.
- » Undertake cooperative marketing using access partner channels to drive conversion.
- » Initiate capacity recovery and demand generation activities to return passenger volumes to our smaller regional airports, including the Bass Strait islands.
- » Support intrastate connections with our Bass Strait islands subject to commercial viability.
- » Prioritise re-establishing direct flights from Gold Coast and Perth and identify other direct city opportunities.
- » Secure trans-Tasman flights from New Zealand with facilities at Hobart Airport to support a long-term international connection to New Zealand.
- » Stimulate and meet demand through additional sailings of the Spirit of Tasmania ferries.

Priority 3: Supporting our people – business owners

As borders closed and other restrictions were imposed to contain COVID-19, demand in the tourism and hospitality sector virtually dried up overnight. Our business owners needed immediate support and all levels of government and our industry associations responded with measures that targeted cash flow, financial relief and expert help to adapt to the uncertain environment.

We have seen a remarkable response from our operators, including retaining staff at a cost to their business, and innovation at a product and business level. This is testament to the character of our sector.

We must not forget the personal impact of this pandemic on our business owners. As they are our people, and the backbone of our communities, ongoing support for their wellbeing is important.

The environment remains unstable. The scale and evolving nature of the pandemic means that operators will pass through several critical periods. For example, the end of JobKeeper and seasonality of demand will test them and the capacity of their business to sustain operations through recovery.

While increasing demand by opening borders, and support until JobKeeper ends, are the most important priorities, the recent Industry Recovery Survey of 470 operators told us they also need improved information and resources around COVID-19 compliance, innovation and adaptation support and assistance to re-enter the market. Maintaining an understanding of the needs of our business owners through recovery will enable targeted and efficient support.

WE WILL

- » Prioritise industry uptake of the Australian Tourism Data Warehouse (ATDW) to develop contemporary multi-channel distribution capabilities for tourism and hospitality operators.
- » Prioritise small-business support through grant, loan and business assistance schemes to sustain themselves, build resilience and innovate.
- » Support our tourism operators to re-engage with the interstate visitor market as Tasmania's borders re-open.
- » Share forward demand, research data and market insights to inform businesses in their planning.
- » Provide regular opportunities for industry to share information and remain connected.
- » Launch a new online solution to connect employment opportunities with tourism and hospitality professionals.
- » Provide an industry mentoring initiative, Incubator Plus, linking experienced tourism and business specialists with operators needing professional assistance with business continuity and support in resetting for new markets.
- » Continue to collaborate with the University of Tasmania around its graduate certificate scholarships.

Priority 3:

SUPPORTING OUR PEOPLE – WORKFORCE

One of our great achievements over the past few years has been the jobs that tourism and hospitality have generated for Tasmanians across our state. This has shaped perceptions within our communities of the value of tourism. Before COVID-19, tourism supported 17.4% of all jobs (direct and indirect) in our state (Tourism Satellite Accounts 2018-19, Tourism Research Australia).

However, our sector faced workforce challenges before the pandemic. The labour and skills supply has not kept pace with the rapid growth in demand, it has not been able to compete with other growing parts of the economy, and there were skills gaps in the crucial sectors of hospitality, cookery and accommodation services.

Employers, training providers and government have not been able to adequately respond to labour and skills shortages. Industry was also concerned about the accessibility and quality of training to meet the needs of employers – and all within the context of uncertainty created by national reform of the structure and direction of the vocational training sector.

The impacts of COVID-19 present us with considerably more challenges that exacerbate the immediate and long-term:

- » Many in our industry have lost their jobs, been stood down or had their hours reduced and remain uncertain about the future. We risk losing talented Tasmanians from our industry as many shift their transferable skills to other growing sectors. Tourism and hospitality may seem a less attractive career in light of COVID-19.
- » Foreign workers have filled many gaps in unskilled and seasonal work. With international travel bans likely to remain for some time we are already seeing a widening gap between labour supply and demand, particularly in some regional destinations.
- » Apprenticeship commencements in hospitality – the core to building a skilled workforce – have virtually ceased.

We have two very clear priorities to support our current workforce through this period of uncertainty and remain connected with industry through reskilling, retraining and new job opportunities as they emerge. This will lay the framework for progressing long-term workforce needs.

WE WILL

- » Establish a new industry-owned and led vocational training provider for the tourism and hospitality sectors, and a Ministerial Tourism and Hospitality Workforce Advisory Committee as a landmark investment in training and development for tourism and hospitality.
- » Prioritise low-cost training, mentoring and professional development opportunities for our workforce to fill immediate skill gaps, future needs and to respond to COVID-19 requirements.
- » Support practical initiatives that connect employers to job-ready people.
- » Grow our workforce through vocational placements for secondary school and college students, apprenticeship programs and industry-led promotion of the sector.

Priority 4: Shaping our future

Through our recovery we will prioritise initiatives that will establish Tasmania as a global leader in responsible and sustainable tourism. We are determined not to lose sight of the aspirations identified in the consultation for the 10-year vision by industry and other visitor economy stakeholders. These will position us for a strong future and increase our contribution to Tasmania and its people.



nungu / West Point
© Jess Bonde

TASMANIAN ABORIGINAL PEOPLE

lutruwita / Tasmania's 40,000 years of continuous Aboriginal heritage is unique, enduring, and central to our shared Tasmanian story.

Tourism is an opportunity for Aboriginal people to share their culture, heritage and deep connection with their lands with visitors to lutruwita / Tasmania. This can create economic and employment opportunities for Aboriginal people, increase knowledge of and respect for Tasmania's Aboriginal culture and heritage, and enrich the Tasmanian visitor experience.

The Tasmanian tourism industry and the Tasmanian Government is committed to working with Aboriginal people on practical strategies to grow the community's role within our visitor economy. We have achieved some positive momentum over the past few years with genuine cultural exchanges between Aboriginal people, the tourism industry and our visitors. We have welcomed the emergence of exciting new indigenous visitor experiences and enterprises. We are determined to build on this momentum and foster a shared vision for a vibrant Aboriginal tourism sector in Tasmania.

WE WILL

- » Encourage Tasmanian Aboriginal people to maintain a program of cultural presentations and workshops with the broader Tasmanian tourism industry.
- » Support Aboriginal tourism operators to establish and operate cultural tourism enterprises on country.
- » Work with the community in ensuring Tasmania's Aboriginal culture and tourism experiences are appropriately and respectfully represented in destination marketing activities.
- » Prioritise Aboriginal presentation of the natural and cultural values of Tasmania's reserve areas, including the Tasmanian Parks and Wildlife Service Discovery Rangers Program, and the Freycinet Master Plan Aboriginal Cultural Project



wukalina walk © Rob Burnett

Priority 4:

SHAPING OUR FUTURE

CLIMATE CHANGE

The tourism industry response to climate change is ambitious and genuine in its goal for Tasmania to be a carbon-neutral destination. This is aligned with the Tasmanian Government Climate Action 21 agenda. There are practical measures we can introduce quickly and more complex challenges over the longer term to achieve this goal. That pathway requires research into the costs, benefits and the value proposition of this goal for Tasmania.

WE WILL

- » Commission research to assess the costs, benefits, value proposition and the pathway to make Tasmania a carbon-neutral destination.
- » Launch an industry toolkit focussed on practical sustainability measures, including carbon reduction, waste and water efficiency.
- » Agree on a pathway towards achieving our carbon-neutral ambition.



Three Capes Track – Cape Pillar and the Blade © Tasmania Parks and Wildlife Service and Stu Gibson

Priority 4:

SHAPING OUR FUTURE

INCLUSIVE TOURISM

People with disability make up almost 20% of Australia's population and about 15% of the world's population. With an ageing population, the proportion of Australian travellers with mobility, vision, hearing and cognitive disabilities is expected to increase. In Australia, about 75% of people with disability regularly travel and there is little difference between people with or without disability when it comes to motivations for travel, the way travel decisions are made, and where to travel.

Considerable work has been done with the disability sector to realise Tasmania as a leader in innovative and inclusive tourism experiences over the longer term, and we will progress several important actions during recovery.

CRUISE

Over the past decade, Tasmania has emerged as a highly desirable cruise destination. While visiting cruise ships have been highly valued by many sectors of the tourism industry and broader economy, there have been concerns expressed about the scale of growth, and future projections.

With considerable uncertainty about the immediate future of the cruise market in Australia, now is an opportunity for Tasmania to understand the potential market demand of cruise ships to the state and the value of this sector.

WE WILL

- » Audit Tasmanian listings in the Australian Tourism Data Warehouse (ATDW) to assess the current supply of inclusive tourism product, identify gaps and encourage all operators to complete new accessibility criteria.
- » Build industry capacity and awareness of inclusive tourism through industry events and communication channels.
- » Consider inclusive visitor infrastructure in planning and investment in the reserve system where practical and strengthen existing procurement processes within the Tasmania's Parks and Wildlife Service to ensure inclusion is considered when purchasing both physical and digital assets.
- » Invest in marketing activities that increase the profile of inclusive tourism opportunities.

WE WILL

- » Research the value proposition of the cruise market for Tasmania to determine its costs and benefits and its alignment with Tasmania's brand.



Blue Derby Mountain Bike Trails
© Stu Gibson

Priority 4:

SHAPING OUR FUTURE

A TOURISM NETWORK FOR THE FUTURE

COVID-19 has created uncertainty in our community, in our industry and in our markets. Understanding what is different and being agile with our strategy will allow us to meet the changing needs of customers and stakeholders.

Our customer must remain our core focus, with consideration of the value they bring to our community, our industry and how they interact with our environment and this place we call home.

The Tasmanian visitor economy has been the envy of the nation and our governance and tourism network has supported its success. However, our market growth in recent years has masked some vulnerabilities and limitations with that structure.

We have the opportunity now to be more purposeful in our destination management, in designing the tourism system to optimise recovery and for our future. We need to be well connected, informed and deliberate about the actions we take to shape our future — a future that is about growing our industry for the benefit of our community.

We also need to encourage the next generation of tourism leaders at all levels of the industry. They will take our industry forward and realise our true potential as one of the world's exceptional visitor destinations.

WE WILL

- » Review the roles and responsibilities, structures and resourcing, being clear on the value proposition for each organisation within the visitor economy network.
- » Pilot an ambassador/host program to engage locals in welcoming visitors and providing information services.
- » Develop a new model for visitor information and engagement.
- » Increase diversity in industry leadership by continuing to identify and fast-track emerging leaders, particularly in currently underrepresented areas of young professionals and women, into industry leadership roles.
- » Plan for the future of our destinations, particularly our emerging regions, leveraging their unique attributes and visitor appeal, with a community-focussed approach through the 2030 Visitor Economy Strategy informing destination management planning.
- » Engage the Tasmanian community in the future of tourism at a strategic level through consultation on the 2030 Visitor Economy Strategy and at a regional level through destination management planning.

Governance

The T21 Visitor Economy Action Plan 2020–2022 has been developed through the T21 partnership between the Tasmanian Government and industry, through the Tourism Industry Council Tasmania. T21 has been tasked with leading recovery planning for the tourism and hospitality sector.

T21 connects with the broader Tasmanian recovery planning through the Premier’s Economic and Social Recovery Advisory Council (PESRAC), at an agency level through the secretariat, and at a ministerial level through the Premier’s Visitor Economy Advisory Council. T21 informs, and is informed by, the broader recovery plans being developed by PESRAC.

The Action Plan delivery will be governed by the established T21 structure. Effective governance is essential to ensure:

- » Each of the identified actions is delivered.
- » Key stakeholders continue to be engaged in the growth of the Tasmanian visitor economy.
- » Overall progress is measured and monitored.
- » Additional or evolved actions are identified to achieve T21’s objectives and vision.

Pumphouse Point,
Lake St Clair
© Emilie Ristevski

To respond to the changing environment, six-month action plans will set the program of delivery and provide agility in responding to changing circumstances. Progress reports will be published on www.t21.net.au





Port Arthur Historic Site
© Hype TV



Tourism Industry Council Tasmania



Copyright notice and Disclaimer Copyright in the publication is owned by the Crown in Right of Tasmania. Information in this publication is intended for general information only and does not constitute professional advice and should not be relied upon as such. No representation or warranty is made as to the accuracy, reliability or completeness of any information in this publication. Readers should make their own enquiries and seek independent advice before acting on or relying upon any of the information provided. The Crown, its officers, employees and agents do not accept liability, however arising, including liability for negligence, for any loss resulting from the use of or reliance upon information in this publication. Images used within this publication remain the property of the copyright holder.

© State of Tasmania August 2020

TOURISM TASMANIA

GPO Box 399 Hobart Tasmania 7001 Australia
Level 3 / 15 Murray Street
Hobart Tasmania 7000 Australia
t (03) 6165 5334
e reception@tourismtasmania.com.au
tourismtasmania.com.au