Tasmanian Access Strategy 2040



Tasmanian Government



Acknowledgement

In recognition of the deep history and culture of this island, we acknowledge and pay respect to all Tasmanian Aboriginal people, as the continuing custodians of lutruwita/Tasmania.

Palawa Kipli, kipli takara tours
© Samuel Shelley

FRONT COVER:
Taste of Summer © Dearna Bond

Minister's foreword

> Tasmania's island geography shapes everything. Every person who arrives or departs, every product that moves to market, and every Tasmanian who needs to travel for health, education or work does so by air or sea.



Access is not a transport issue - it is foundational to almost everything the Tasmanian Government is working to achieve.

Access underpins our visitor economy, our trade ambitions, our agricultural exports, our ability to attract and retain health and education workers, and the liveability of communities across every region. This Strategy sets out how the Tasmanian Government will work with our partners to align efforts to ensure the access system serves the whole of Tasmania.

The global environment is more competitive and geopolitically complex than at any point in recent memory, and Tasmania cannot afford to be passive. Our investment pipeline is strong. Significant capital is being committed to our gateway airports, seaports and the new Spirit of Tasmania vessels. Major developments including Marinus Link, the Mac Point Precinct and the Launceston Convention Centre will generate new demand for access and signal Tasmania's ambition. Together, government and private sector partners are laying the foundations for our future prosperity, and this Strategy provides the framework to grow an access network that future requires.

This is long term work. Tasmania is well positioned. The access environment will continue to evolve, shaped by commercial decisions, global trends, new technology and changing markets. This Strategy is designed to guide Tasmania's approach, not as a fixed plan but as a framework for ongoing collaboration and action.

Hon Roger Jaensch MP
Minister for Tourism, Hospitality and Events



Contents

Purpose of this Strategy 4

Building on Access 2020 6

Tasmania's access landscape today 8

Access network 10

Opportunities and challenges 12

Aviation context 13

Strategic and essential aviation 14

Investing in Tasmania's aviation future 15

Spirit of Tasmania IV © Spirit of Tasmania



Role of the Tasmanian Government 16

Strategic pillars 18

Pillar 1: Benefit for Tasmanians 18

Pillar 2: Sustainable, affordable and reliable air and sea network 19

Pillar 3: Visitor destination appeal 20

Pillar 4: Infrastructure and services 20

Markets 22

Domestic passenger 22

International passengers 22

Freight 23

Regional access 23

Enablers of success 24

Partnerships and governance 24

Data research 24

Policy and advocacy 25

Network efficiency and alignment 25

Purpose of this Strategy

> Our goal is to drive a strong air and sea access network to enable economic growth, liveability, visitor attraction and future prosperity for Tasmania.

As an island state, Tasmania is fully reliant on air and sea access to mainland Australia and beyond. The efficiency and coordination of the access system flows directly through to the cost of living, competitiveness and Tasmania's attractiveness as a place to live, visit, work and invest.

This Strategy outlines the Tasmanian Government's priorities for improving air and sea passenger and freight access into and around Tasmania. It takes a whole of economy approach, considering the needs of Tasmanians, visitors, businesses and communities across all regions, recognising that access underpins safety, prosperity and connectivity, and Tasmania's tourism, trade, health, education and liveability goals. The reverse is also true. Without investment to grow the economy and tourism particularly, standards of living and availability of air and sea services for Tasmanians will be at risk.

Reflecting this, the Tasmanian Access Strategy 2040 informs and is informed by a broader and evolving context of Tasmanian Government strategies and policies, including the Economic Diversification Strategy, Tasmanian Integrated Freight Strategy, Agriculture Strategy, Infrastructure Strategy, Biosecurity Plan, Trade Strategy and Skills Plan. It is developed in a rapidly changing environment and with a long term horizon, and in this context priorities with material financial implications are contingent on a demonstrated business case, budget funding availability, and the Government's overall economic strategy.

Achieving our goal requires coordination and alignment across a network of access partners. Ensuring the efficient and effective operation of the access network is in Tasmania's interest, this Strategy sets out how the Tasmanian Government will work with our partners to deliver the most benefit for the state — now and into the future. As a long-term strategy, it will need to adapt to changing global and market conditions — including shifts in aviation and shipping markets, geopolitical developments, emerging technologies and the energy transition — and will be reviewed periodically to ensure its priorities remain current and effective.

The Strategy articulates government's role as a strategic partner and enabler of the access network, with the goal of securing access that works for all Tasmanians.

Access Strategy 2040: in summary

CONTEXT
As an island state, access is essential to daily life in Tasmania.

ROLE OF GOVERNMENT
A strategic partner and enabler of air and sea access and as a market shaper, driving and investing in growing demand across all markets for the benefit of the state.

GOAL
To drive a strong air and sea access network to enable economic growth, liveability, visitor attraction and future prosperity for Tasmania.

PILLAR 1
Benefit for Tasmanians.

PILLAR 2
Sustainable, affordable and reliable air and sea network.

PILLAR 3
Visitor destination appeal.

PILLAR 4
Infrastructure and services.

MARKETS
Domestic passenger
International passenger
Freight
Regional access

ENABLERS
Partnerships and governance
Network efficiency and alignment
Policy and advocacy
Data and research

Building on Access 2020

> Access 2020 – Five-Year Sea and Air Access Strategy (2015–2020), Tasmania's first whole-of-government access strategy, set out a coordinated approach to growing air and sea capacity, improving connectivity and supporting the broader visitor economy goals.

The headline domestic aviation target was to grow seat capacity on the key routes between Melbourne, Sydney and Brisbane to Hobart and Launceston by 700,000 seats over five years, exceeded over the life of the strategy.

Key achievements during the Access 2020 Strategy include:

- **Domestic aviation capacity:** By end of June 2019, more than 700,000 seats were added to Hobart and Launceston networks since the commencement of the strategy. By 2019, Hobart Airport offered direct year-round services to every mainland state capital, including new routes to Adelaide, Perth and the Gold Coast. Seat capacity into Launceston grew significantly on the Melbourne, Brisbane and Sydney routes, and a new dedicated air freight service on the Launceston to Melbourne to Perth route delivered direct export benefits for northern Tasmanian fresh food producers.
- **Sea access growth:** TT-Line carried a record 448,764 passengers in 2017-18 and recorded consecutive years of record freight volumes.
- **Cruise shipping expansion:** Cruise ship port calls grew from 59 in the first year of the strategy to a peak of 125 calls in 2017-18. TasPorts invested more than $10 million in cruise terminal and port infrastructure across Hobart, Burnie and regional ports, enabling larger vessels to visit and supporting new regional cruise itineraries delivering regional economic benefit.
- **International connectivity:** Codeshare agreements improved connectivity from key source markets including the United States, China and Singapore. Spending by international visitors exceeded $500 million for the first time in 2017-18. Work on direct flight business cases and terminal expansion to enable international passenger processing at Hobart Airport laid the foundation for direct international services.



Launceston Airport

- **Gateway infrastructure:** Launceston Airport completed a terminal transformation and won the Australian Airports Association Major Airport of the Year award three years in succession. Hobart Airport completed a $40 million runway extension in March 2018, enabling wide-body aircraft to operate direct services. Devonport Airport underwent a $5 million runway resurfacing project.
- **Air freight development:** A new $14 million freight handling facility at Hobart Airport provided cool storage capacity to support direct export of perishable produce and expand international freight opportunities.
- **Coordination model:** The Access Working Group model, bringing together government and access partners in a coordinated whole-of-economy approach, delivered strong outcomes across the life of the strategy and is carried forward into this strategy.

By the end of the strategy period in 2019, visitation had grown from 1.15 million to 1.32 million scheduled air and sea visitors, and visitor expenditure had increased from $2.05 billion to $2.41 billion. These outcomes provide a strong foundation for the Tasmanian Government Access Strategy 2040.

Tasmania's access landscape today

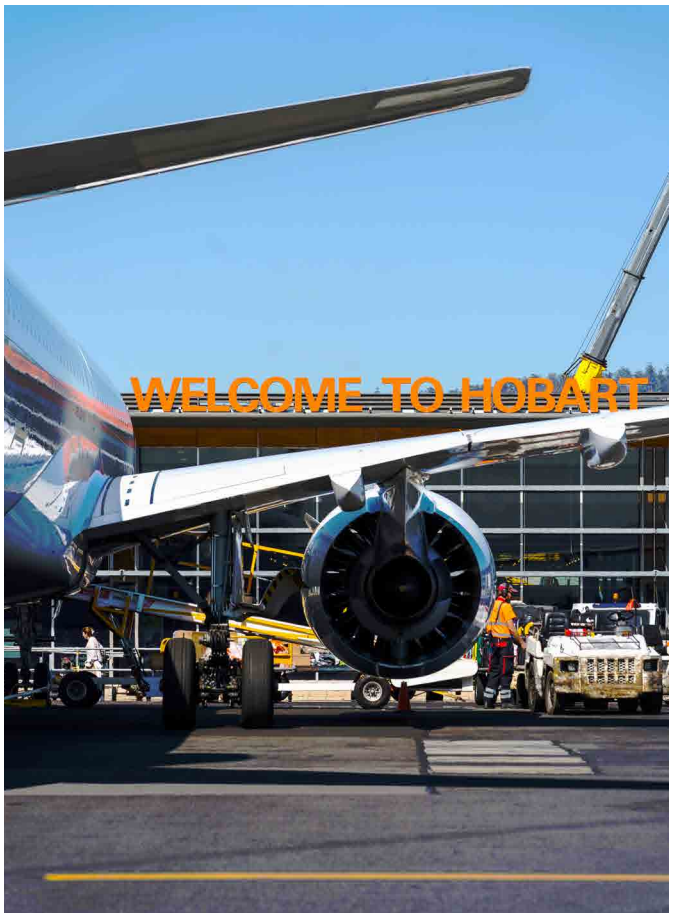
> Tasmania's island geography makes air and sea access both an economic foundation and a state-scale risk. Every person and every product that enters or leaves the state does so by air or sea — there is no alternative.

The access landscape is not uniform across modes or markets. Air travel accounts for around 92 per cent of passenger movements, making the frequency, affordability and reliability of air services central to how the state functions. Air freight plays a smaller but important role for time sensitive, high value perishable exports, with scope to grow capacity in line with export demand and to open up new international markets for Tasmanian producers. Sea access carries over 99 per cent of Tasmania's freight by volume and is the primary mode for leisure visitors who arrive with vehicles, stay longer and travel more broadly across the state. It also carries the essential supplies — including fuel — on which Tasmanians depend.

Looking to 2040, the resilience of the access system is a material state-scale concern. Tasmania's dependence on sea freight for fuel imports and supply chain continuity means that disruptions to Bass Strait services — from extreme weather, operator failure, global supply chain pressures or the costs of energy transition — carry consequences well beyond the transport sector. This strategy is developed in alignment with the Tasmanian Disaster Resilience Strategy, recognising that a well-functioning access system is not only an economic enabler but a condition of the state's safety and wellbeing.



Aerial of Burnie Port © Stu Gibson



Hobart International Airport



Hobart International Airport



Hobart International Airport



Hobart International Airport © Alastair Bett

Access network

> Tasmania's access network includes the infrastructure, services, and operational systems that enable connectivity by air and sea from Tasmania to mainland Australia and international destinations.

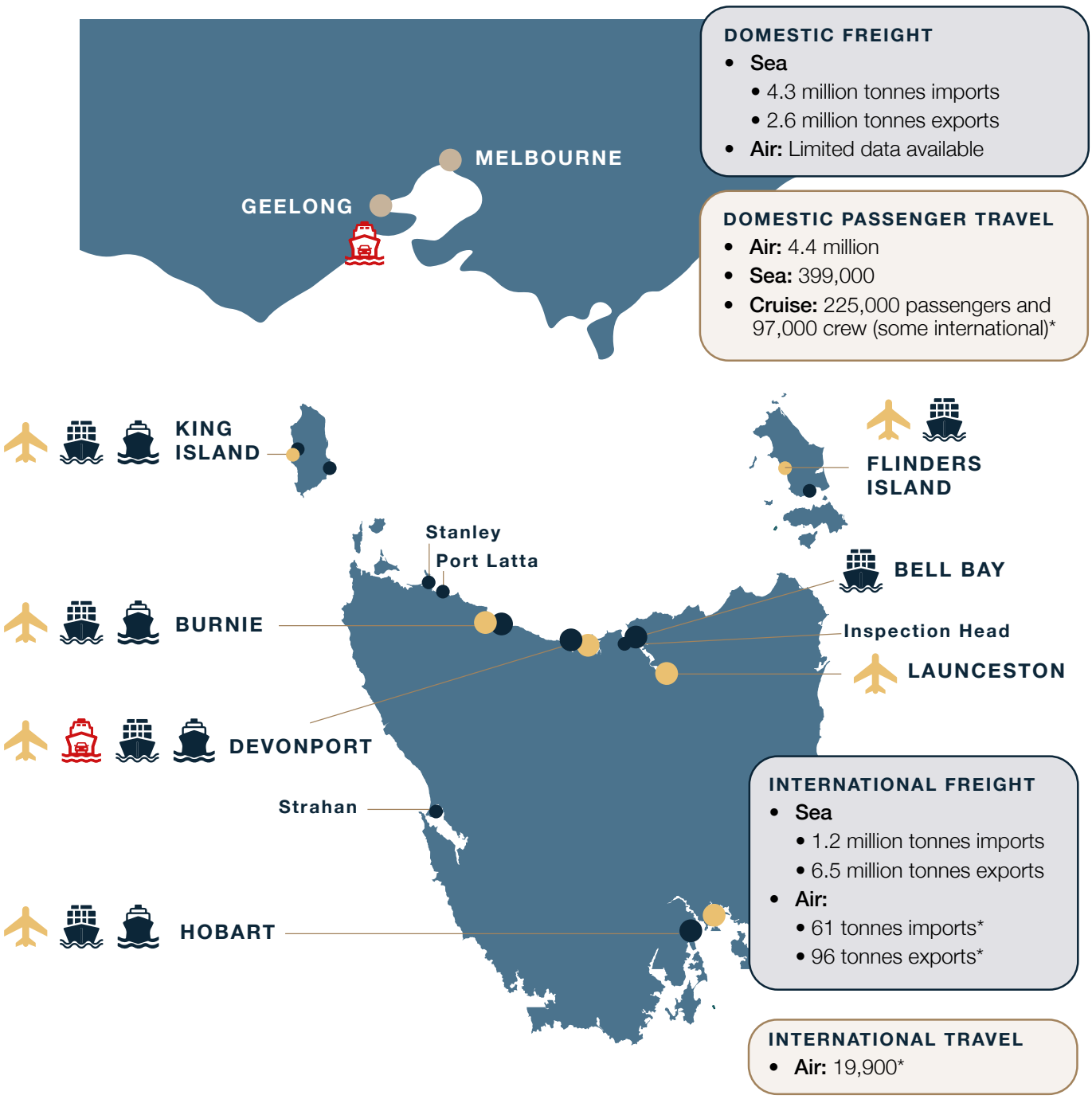
Passenger access allows Tasmanians to travel for business, health services, education, training, leisure, holidays, and to visit family and friends. Freight access enables Tasmanian businesses to access inputs for production and export products to mainland Australia and international markets, and for Tasmanians to purchase goods not produced locally. The visitor economy contributes significantly to the Tasmanian economy, and reliable access is core to sustaining and growing visitation.

Hobart and Launceston airports, privately owned, are the main passenger access ports to Tasmania, with Devonport and Burnie servicing the north west and airports on King and Flinders islands servicing our Bass Strait island communities. Tasmania is served by four major publicly owned seaports at Bell Bay, Burnie, Devonport and Hobart, and multiple smaller community and island facilities.

For a population of just over half a million, Tasmania's access infrastructure needs are disproportionately large relative to mainland states. This reflects Tasmania's unique position as an island state where all goods and people moving into or out of the state must do so by air or sea. Tasmania's relatively small population base and high dependence on air and sea access create ongoing challenges for access network planning.

Two risks sit on either side of this planning challenge. Under-utilisation of access infrastructure contributes to higher operating and infrastructure costs and creates challenges with service frequency, resulting in higher costs of living, reduced competitiveness and lower quality services for Tasmanians. Under-investment carries equal risk: capacity constraints lead to higher costs and service disruptions, making Tasmanian goods and services less competitive, raising the cost of living, and reducing Tasmania's attractiveness as a place to visit, invest and live. Striking the right balance between these risks is central to the strategic direction of this Strategy.

SNAPSHOT OF TASMANIAN ACCESS NETWORK 2024-25



DOMESTIC FREIGHT

- **Sea**
  - 4.3 million tonnes imports
  - 2.6 million tonnes exports
- **Air:** Limited data available

DOMESTIC PASSENGER TRAVEL

- **Air:** 4.4 million
- **Sea:** 399,000
- **Cruise:** 225,000 passengers and 97,000 crew (some international)*

INTERNATIONAL FREIGHT

- **Sea**
  - 1.2 million tonnes imports
  - 6.5 million tonnes exports
- **Air:**
  - 61 tonnes imports*
  - 96 tonnes exports*

INTERNATIONAL TRAVEL

- **Air:** 19,900*

**Figures noted with an asterix refer to 2023-24 due to data avilability.*
Source: BITRE, 2024; TVS, 2025; TasPorts, 2024.

Opportunities and Challenges

Major infrastructure investments and growing visitor demand present genuine opportunities for Tasmania's access system, alongside structural pressures that require active management.

OPPORTUNITIES

- Significant terminal investments at Hobart and Launceston airports will support forecast growth, particularly from our core routes and markets.
- Continued strong growth into the north of the state through air access will be further enabled by the additional sea capacity from the Spirit of Tasmania vessels.
- The Hobart Airport runway upgrade enables wide-body aircraft to land at Hobart for the first time, making direct long-haul international services viable. A direct connection to an Asian hub would enhance Tasmania's global accessibility, unlock new visitor markets and support export growth in high-value perishables through dedicated air freight services.
- Tasmania's strong destination brand and investment in demand driving year-round events calendar and infrastructure including the Mac Point Precinct with a multipurpose stadium, Launceston Convention Centre and the Next Iconic Walk complement investments by our access partners to provide the capacity for growth into the north and south of the state.
- Other major state investments, for example Marinus Link, drive access demand for markets other than leisure.
- SeaRoad and Strait Link have also made significant investment in new vessels, facilitating future growth in Tasmanian trade across Bass Strait.
- The new Spirit of Tasmania vessels will increase sea access capacity with significantly greater over-height vehicle capacity.
- Itinerant aircraft movement associated with charter flights, private jets and Antarctic connectivity represent an opportunity to be leveraged, attracting high value visitors to the state.

CHALLENGES

- Tasmania's most fundamental access challenge is its geography. As an island state with a small, dispersed population and no land transport alternative, Tasmania is highly reliant on air and sea access and positioned at the end of airline network routes.
- The commercial decisions of airlines reflect network-wide considerations of yield and fleet availability, which can influence airfares, scheduling and on-time performance.
- Seasonality presents a structural challenge across both air and sea access, with peak summer demand unable to be sustained year-round.
- Establishment of fixed base operations at Hobart Airport for itinerant aircraft may be a constraint for growth of high value markets.
- Regional aviation faces compounding pressures from high operating costs, ageing infrastructure, limited revenue bases at smaller airports and the industry-wide shift toward larger aircraft. These pressures place ongoing strain on the financial sustainability of regional carriers and community-owned airports, including those servicing the Bass Strait islands.
- Attracting and retaining specific aviation skills and frontline staff in a competitive market to support growth in air access for the state.
- Workforce constraints, production costs and freight costs remain significant challenges for Tasmanian exporters, despite the support provided by the Tasmanian Freight Equalisation Scheme.

Aviation context

Aviation is a dynamic, commercially driven industry shaped by forces well beyond Tasmania's control. Fuel costs, geopolitical instability, trade tensions and fleet availability all influence the decisions airlines make about where and how they fly. Tasmania's access strategy is developed in this context, and its success depends in part on how well the state is positioned to respond when conditions shift.

Passenger numbers are forecast to nearly double globally by 2043[1], with Asia-Pacific leading growth — rising incomes and expanding middle classes across India, Indonesia and Southeast Asia are driving demand at a pace the rest of the world is unlikely to match.

In Australia, long-term forecasts point to passenger numbers more than doubling by 2049-50.[2]

On the flip side, current supply constraints — including aircraft shortages, labour pressures and supply chain fragility — continue to moderate growth.

Regional aviation tells a different story. Passenger numbers on regional routes fell by 5.3 per cent in the year to March 2025, driven by fleet consolidation and the commercial pressures facing smaller operators[3].



© Revolution MTB

1 – IATA 2024, 20-Year Passenger Forecast
2 – BITRE, Australian Aviation Forecasts 2024 to 2050
3 – ACCC, Domestic Airline Competition in Australia, May 2025

The Australian Government Aviation White Paper: Towards 2050 (2024) identifies competition and affordability as central challenges for the sector. Australia's domestic aviation market is highly concentrated, and evidence indicates that the presence of an additional airline on a route can reduce airfares by five to ten per cent. For regional aviation, high fares, limited service options and the commercial pressures facing smaller operators compound these challenges. For Tasmania, as an island state at the end of airline network routes with no land transport alternative, the level of competition on key routes has a direct bearing on the cost of living, business competitiveness and the accessibility of the state for visitors and residents alike.

The industry is also navigating a sustainability transition. Sustainable Aviation Fuel represents the most practical near-term decarbonisation pathway, with governments beginning to mandate its use and investment in production is growing. Costs remain substantially above conventional jet fuel, with implications for airline operating costs and route economics over the life of this strategy.

Technology is reshaping airline decision-making and airport operations. Artificial intelligence is enabling more precise, real-time assessment of route performance, increasing the precision with which airlines evaluate network opportunities. For Tasmania, maintaining strong demand signals through destination marketing and growing passenger volumes will be important to the state's competitive position in airline network planning.

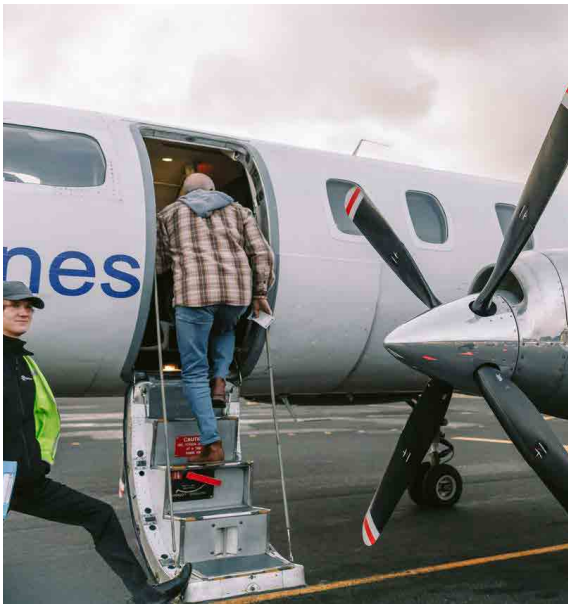
Strategic and essential aviation

Tasmania's airports serve purposes that extend well beyond commercial passenger and freight markets. Hobart is one of only five Antarctic gateway cities in the world, Hobart Airport is the base for the Australian Antarctic Division's intercontinental aviation operations, supporting the movement of expeditioners and equipment to Australia's Antarctic and Southern Ocean programs. This role contributes over $183 million to the Tasmanian economy and supports more than 1,000 Tasmanian jobs. Protecting and growing it is a long term priority for the state.[4]

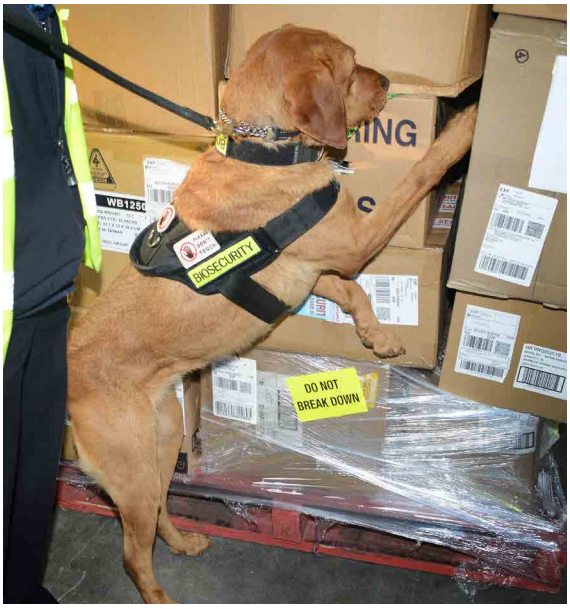
Emergency services aviation is equally essential. Aeromedical retrieval, firefighting, search and rescue and aerial law enforcement operations depend on reliable airport access around the clock. Ensuring airport infrastructure planning accounts for these non-commercial aviation needs alongside passenger and freight growth is a shared responsibility across government and its airport partners.

Biosecurity operations at Tasmanian airports and seaports are delivered by the Tasmanian Government. Tasmania's freedom from many pests, weeds and diseases present on the mainland is a significant competitive advantage for the state's primary industries and natural environment and maintaining that status depends on effective inspection at every air and sea entry point. As passenger and incoming freight volumes grow and new international services develop, ensuring biosecurity capability keeps pace is an ongoing operational priority.

General aviation supports dispersal, accessibility and high value visitor markets across the state. Charter and private aviation serves segments including events, premium tourism and access to remote and regional destinations not connected by scheduled services. Aviation training also contributes to the pipeline of skilled aviation workers that the broader access system depends on.



© Studio Hubert



© Biosecurity Tasmania

4 – Department of State Growth, The contribution of the Antarctic and Southern Ocean Sector to the Tasmanian economy 2021-22, 2023.

Investing in Tasmania's aviation future

Hobart and Launceston airports commitment to the state's future is reflected in their significant investments currently underway. Together they are positioning Tasmania's two major aviation gateways for long term growth - capital investment underway at both airports will expand capacity, improve the passenger experience and strengthen Tasmania's competitiveness as a destination and export market.

At Hobart Airport, a $200 million terminal expansion is underway that will double the terminal's size and increase annual passenger capacity to 3.5 million by 2030, with a masterplan pathway to 5.5 million passengers by 2042. The works, due for completion in early 2028, will deliver a larger departures area, additional boarding gates, upgraded security screening and new food, beverage and retail options. The terminal expansion follows the completion of a $130 million runway upgrade, jointly funded by Hobart Airport and the Australian Government, completed in August 2025. The upgraded runway enables wide body aircraft including the Airbus A350 and Boeing 787 to operate direct long haul international routes and expanded freight options for Tasmanian exporters.

At Launceston Airport, a $100 million redevelopment program is transforming Tasmania's northern gateway, reflecting a forecast of approximately 2 million passengers by 2044. A new check in hall and security screening area was completed in 2023, and a $12 million departures hall expansion is currently underway, adding capacity, a new boarding gate and new dining and retail offerings. Airfield works including a new taxiway, apron upgrades and airfield lighting improvements will accommodate larger aircraft and growing freight demand.



Launceston Airport © Rob Burnett

Role of the Tasmanian Government

> Tasmania's air and sea access system is delivered through a network of strategic partners, each with a distinct role. The system performs best through coordination and collaboration, where partners are enabled, roles are well understood and priorities aligned.

With close to 92% of passenger travel by air, our effectiveness in maintaining and growing access is reliant on working closely with our air partners to leverage our collective resources. Similarly, sea freight accounts for over 99% of the state's freight volume, and airfreight enables high value, time sensitive produce into domestic and international markets. The competitiveness of Tasmanian exports is reliant on an integrated and effective supply chain.

No single partner controls all the levers — each partner has their role to play.

The Tasmanian Government also provides biosecurity services that significantly reduce the risks of pests and diseases entering Tasmania through entry point risk pathways while the Australian Government provides international border services, sets the regulatory framework and administers national funding programs including the Tasmanian Freight Equalisation Scheme (TFES) and Bass Strait Passenger Vehicle Equalisation Scheme (BSPVES).

The Tasmanian Government's primary role is to drive a strong economy and economic growth essential for a sustainable access network, to be clear about access priorities for Tasmania and ensure the state's access opportunities and challenges are well understood by all levels of government – setting and influencing strategy, policy and regulation that accounts for the specific needs of Tasmania.

There is also an important role as a strategic partner and market shaper — generating demand, market opportunities and bringing a whole of state strategic lens to ensure state priorities are complementary to and reflected in how the system is planned, invested in and operated.

TASMANIAN GOVERNMENT	Invests in activities and infrastructure to grow the presence and opportunity of Tasmania in domestic and international markets, works closely with air and seaports to grow access; biosecurity measures; and work with access partners to deliver a whole of system approach.
AUSTRALIAN GOVERNMENT	Sets the national regulatory and policy environment for both air and sea access and investment in priority enabling infrastructure and funding for Tasmanian Transport Schemes (TFES and BSPVES).
AIRPORTS	Provides key access infrastructure and are the primary commercial interface with airlines to bring business to the airports to facilitate passenger and freight movement through the airports.
TASPORTS	Manages Tasmania's sea port infrastructure and Devonport Airport, as a state owned company. Interface with government owned and commercial shipping lines to facilitate Tasmanian trade.
TT-LINE	TT-Line operates the Spirit of Tasmania passenger and freight services between Devonport and Geelong.

Strategic pillars

> Our goal is a strong, well connected air and sea access network that enables economic growth, liveability, visitor attraction and future prosperity for Tasmania.

The strategy is structured around four pillars that focus government activity and set out what success looks like for Tasmania's air and sea access system to 2040. They are grounded in a clear understanding of what the access system needs to deliver — for Tasmanians who depend on it every day, for the businesses and industries that rely on competitive and reliable connections, and for a visitor economy that depends on Tasmania being appealing and easy to reach. Together, they inform and guide coordinated and practical action, strengthening collaboration between the Tasmanian Government and our access partners.

The four objectives reflect where that effort is best directed and how we will know it is working.

Pillar 1
Benefit for Tasmanians

Reliable and affordable air and sea access ensures Tasmanians can travel and move goods affordably for work and business, healthcare, education and social connection. In the north west of the state and on the Bass Strait islands, air and sea services are essential to daily life and government has a particular responsibility to ensure service continuity.

OUR PRIORITIES

- Affordable, accessible air and sea access network that meets the needs of all Tasmanians.
- Continuation and improvement of the Australian Government's TFES and BSPVES to better support the affordability of freight and passenger access across Bass Strait, offsetting the shipping disadvantage of Tasmania.
- A sustainable long term funding model to ensure essential air services to King Island and Flinders Island, reducing reliance on short term grant arrangements.
- Alignment of this Strategy with other government priorities across population growth, health and education as well as workforce, trade and economic sector priorities to ensure air and sea connectivity supports Tasmania's growth objectives.

Flinders Island Airport Airport © Studio Hubert



Pillar 2
Sustainable, affordable and reliable air and sea network

Tasmania's access network depends on commercially viable, year round services by air and sea. With close to 92% of passenger travel by air, the frequency and affordability of air services is central to how well the network performs for Tasmanians, visitors and businesses alike. Sea freight carries over 99% of the state's freight volume, and the competitiveness of Tasmanian exports depends on a supply chain that is efficient and cost effective. Across both modes, demand is the common lever. Stronger, more consistent passenger demand supports viability and freight capacity.

OUR PRIORITIES

- Grow demand and capacity on priority domestic routes, in partnership with Tasmanian airports, with a focus on frequency and reliability of trunk routes between Hobart, Launceston and mainland capital cities and major centres.
- Direct seasonal air services from a key Asian hub, in partnership with Hobart Airport and the Australian Government, supported through the Aviation Attraction Fund.
- Domestic services that have been supported through the Aviation Attraction Fund embedded as long term network services.
- Align aviation attraction activity with visitor economy and trade objectives to ensure air access growth delivers broad economic benefit for the state.
- New and extended domestic air routes that grow capacity, improve connectivity and reduce seasonality.
- Year-round direct air services to New Zealand, building on the existing seasonal service.
- Maximise the opportunity of the additional capacity delivered through the two new Spirit of Tasmania ferries to grow tourism and support freight operations.
- Strengthen freight efficiency and supply chain resilience for Tasmanian exports.

Pillar 3
Visitor destination appeal

Tasmania's visitor economy is a significant contributor to the state's economic prosperity. In 2023-24, tourism generated $4.5 billion for the Tasmanian economy, supporting one in six Tasmanian jobs[5]. Strong forecast visitor growth to 2030 underlines the opportunity, and major investments in the Mac Point Precinct, Launceston Convention Centre, the new Spirit of Tasmania ferries, the Next Iconic Walk and other product investment presents a new era of tourism for Tasmania. Air access is the primary travel mode for visitors and maintaining strong air connectivity is essential in realising these opportunities. The Spirit of Tasmania plays a complementary role, with around 91% of sea visitors bringing their own vehicle, staying longer and exploring more of the state's regions. Cruise visitation delivers further economic benefit to hospitality and tourism businesses in and around Tasmania's port communities.

OUR PRIORITIES

- Grow year round visitation into the state through an aligned strategy across domestic and international destination marketing, including Spirit of Tasmania, major events including sport, and business events.
- Increase demand driving activity in international visitor markets aligned with current and prospective international air services.
- Leverage the tourism opportunity provided by the new Spirit of Tasmania vessels, growing passenger and vehicle demand with a focus on the caravan and motorhome market.
- Work with access partners on route scheduling and connectivity to enable ease of access for markets, particularly where direct flight options don't exist.
- Grow the value of cruise ship visitation aligned with the findings of the research into the economic, social and environmental impacts of cruise shipping for Tasmania[6] and the key directions and goals of the 2030 Visitor Economy Strategy.
- Support the delivery of a welcoming experience across the access network, including a focus on improved accessibility for visitors and Tasmanians.

5 – Tourism Satellite Accounts 2023-24, TRA
6 – Value of Cruise Shipping for Tasmania, Updated 2025, KPMG

Pillar 4
Infrastructure and services

Tasmania is well served by access infrastructure. Port berths operate at around 30% average utilisation and airport masterplans show clear investment pathways to accommodate growth well into the future, with Hobart Airport planning for 5.5 million passengers by 2042 and Launceston 2 million by 2044. Government's infrastructure role is to ensure the right enabling conditions exist and to invest selectively where genuine gaps exist. The most pressing constraints on access performance are workforce availability, system efficiency and seasonality rather than physical capacity.

OUR PRIORITIES

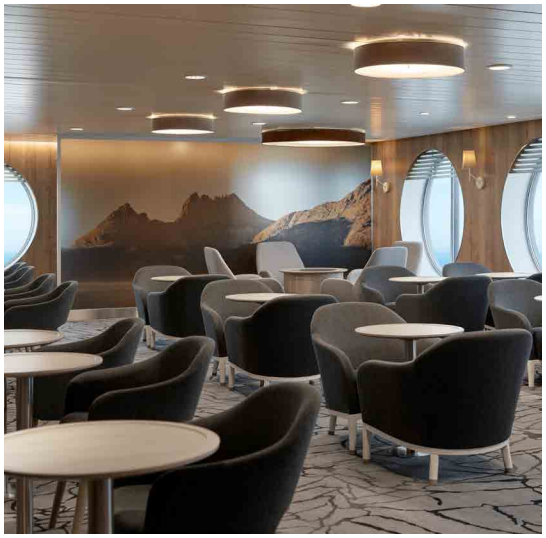
- Available air and sea port capacity is fully utilised.
- Accommodation, hospitality and broader tourism infrastructure capacity to enable visitor growth.
- Maintain biosecurity operations at the state's entry points to protect and enhance Tasmania's environment, primary and other industries, and public well-being, health, amenity and safety from the negative impacts of pests, weeds and diseases.
- Resourcing by Australian Border Force to support growth in aviation, cruise and freight, including at regional locations.
- Support the delivery of enabling infrastructure including road, freight rail and public transport connections to airports and ports, that unlocks the full value of access investments, subject to business case viability.
- Integrate aviation and port access infrastructure requirements into the state's long term transport infrastructure planning.
- Address workforce shortages with industry and training providers in the transport and logistics sector to improve the efficiency and reliability of the access system.



Cruise ship in Hobart Port at dusk – Silver Muse © Stu Gibson



Spirit of Tasmania IV – Maatsuyker Bar



Spirit of Tasmania IV – lounge



Devonport Airport © TasPorts and Rob Burnett

Markets

Domestic passenger

Domestic passenger travel is the backbone of Tasmania's access network. Around 4.4 million air passengers travel to and from Tasmania annually to cities and major centres accounting for the majority of traffic. The Spirit of Tasmania provides a unique opportunity for vehicle access on and off the island and Tasmanian ports receive cruise ship calls from domestic markets that contribute to the visitor economy. Strengthening the performance of the network in terms of frequency, affordability, reliability and seasonality will grow Tasmania's competitiveness as a destination and support the liveability of its communities.

OUR PRIORITIES

- Maintain and grow capacity on trunk air routes between Hobart, Launceston and mainland capital cities and major centres, prioritising schedule, frequency, connectivity and affordability.
- Reduce seasonality through coordinated destination marketing, events, business events and airline/trade partnership activity to improve year-round load factors and service sustainability.
- Develop new direct domestic air route opportunities where evidence of demand and commercial viability supports investment.
- Leverage the opportunity of the new Spirit of Tasmania ferries through stronger alignment with Tasmania's destination marketing, scheduling frequency and capacity to meet visitor economy goals.

International passengers

Growing international markets is a shared priority across government, spanning tourism, trade, international education and broader economic development. As global conditions grow more complex, our approach to international engagement must keep pace, with access playing a central role in connecting Tasmania to the world.

Improved connectivity — both direct and through hub connections — will grow Tasmania's appeal to high-value visitors, support exporters, attract international students and expand outbound travel options for Tasmanians. Strong international air links reinforce trade and investment relationships, with tourism and trade often developing in the same markets. International cruise calls at Tasmanian ports represent a further market opportunity.

OUR PRIORITIES

- Strengthen one-stop connectivity to global markets through hub airports on the Australian east coast and internationally.
- Secure and grow direct international air services, with priority focus on year-round New Zealand services and a direct seasonal service from an Asian hub.
- Support demand generation in international visitor markets to build the commercial case for sustained and expanded direct services.
- Advocate for Australian Government customs and border resources, bilateral air services arrangements and international aviation and cruise policy settings that support new services into Tasmania.
- Work with airlines, freight operators and industry partners to improve direct air freight connectivity for Tasmanian exporters into key international markets.
- Attract high value international cruise ships to Tasmanian ports, aligned with the goals of the 2030 Visitor Economy Strategy.

Freight

Over 99 per cent of Tasmania's freight by volume is carried by sea, across the Bass Strait and through international shipping routes. The efficiency and reliability of this system determines how competitive Tasmania is in market. The TFES provides a partial cost offset for eligible goods. Air freight plays a smaller but important role for time sensitive, high value perishable exports, with scope to grow capacity in line with export demand and to open up new international markets for Tasmanian producers.

OUR PRIORITIES

- Support the continuity and resilience of Tasmania's Bass Strait and international shipping connections, recognising their critical role in the state's economy.
- Maintain biosecurity operations at the State's freight entry points to protect and enhance Tasmania's environment, primary and other industries, and public well-being, health, amenity and safety from the negative impact of pests, weeds and diseases,
- Monitor and respond to supply chain disruptions that threaten the continuity of essential freight access.
- Advocate to the Australian Government for freight equalisation arrangements that are appropriately targeted and effectively administered growing benefits to producers and exporters.
- Air freight solutions that support the competitiveness of Tasmania's high value perishable export industries.
- Port and logistics infrastructure planning that meets forecast freight demand.
- Advocate to the Port of Melbourne for recognition and prioritisation of the access needs of Tasmanian shippers.

Regional access

Regional air and sea access connects communities across north west Tasmania and the Bass Strait islands, where services are essential to daily life. Sustaining these connections is a priority for government, recognising both the needs of residents and the economic contribution of visitor markets to regional communities.

OUR PRIORITIES

- Develop a Bass Strait Islands Transport Strategy which establishes a framework for sustainable transport links that meets the changing needs of King Island and the Furneaux Group communities and economies.
- Work with the Australian Government and relevant operators to stabilise regional air and sea services where commercial forces alone cannot deliver adequate access outcomes.
- Work with north west Tasmanian airports, airlines and the Australian Government to support the long term sustainability of regional air services in Burnie and Devonport.
- Support investment in regional airport infrastructure to maintain safe, all-weather access, particularly where runway and terminal assets require renewal.
- Grow visitor demand for Bass Strait island destinations to strengthen the commercial case for regular, reliable services.
- Ensure continuity of regular sea freight services to the Bass Strait island communities.

Enablers of success

> Delivering the priorities of this strategy depends on conditions that support effective action across the access system.

The enablers described in this section reflect the mechanisms and capabilities that government, in partnership with access network operators, will maintain and strengthen to achieve the strategy's goals.

Partnership and governance

With a long term outlook, effective partnership and governance will ensure that we remain informed as a collective about the current and future environment with a focus on adapting to changing market conditions.

WE WILL

- Maintain effective governance arrangements through the Access Working Group to provide oversight of the Strategy implementation.
- Implement the strategy through biennial Action Plans, reporting on progress annually.
- Build and maintain relationships across all levels of government to advance Tasmania's access interests.
- Coordinate across the access system with a view to align goals and improve the overall performance of air and sea services.

Data and Research

Sound, timely evidence is the foundation of credible decision-making across the access system. Building a shared evidence base supports investment decisions, national advocacy and prioritisation — and strengthens Tasmania's case with airlines, Treasury and the Commonwealth.

WE WILL

- Define and report on a small number of agreed economic, social and network measures to track performance of the access network for Tasmania.
- Work with access partners to improve data sharing arrangements that support more effective system-wide planning and decision-making.
- Invest in research and analysis to support business cases for route development, infrastructure investment and policy advocacy.
- Use data and research to inform demand-driving activities and align marketing and access investment with evidence of market opportunity.

Hobart International Airport



Policy and Advocacy

Many of the settings that shape Tasmania's access system — including regulation, funding and freight policy — fall outside the direct control of the Tasmanian Government. Shifting national settings in Tasmania's favour requires advocacy that is targeted, consistent and grounded in evidence.

WE WILL

- Engage with and advocate to the Australian Government for policy and funding settings that grow sustainable air and sea access for Tasmania, including the implications of aviation and shipping decarbonisation for Tasmania.
- Engage on national freight policy to ensure the Tasmanian Freight Equalisation Scheme and related mechanisms effectively address the cost burden of island access for Tasmanian businesses and producers.
- Monitor and respond to regulatory and legislative developments affecting air and sea access, including at federal, state and local government levels.
- Engage with local councils on access matters, including the sustainability of council owned regional airports.

Network efficiency and alignment

Lifting outcomes for Tasmania's access system does not always require new infrastructure. Many of the inefficiencies that add cost and reduce reliability reflect coordination gaps, misaligned incentives and supply chain fragmentation that can be addressed through focused, collaborative action.

WE WILL

- Identify and prioritise system friction points that materially add cost or reduce reliability, with a focus on coordination gaps rather than physical infrastructure constraints.
- Work with government and industry to address workforce constraints in transport and logistics that limit the reliability and efficiency of air and sea services.
- Ensure that government initiatives and funding programs are designed and administered in ways that support efficient market outcomes.
- Consider sea and air access with policies and strategies on road and rail transport and industrial land-use to improve efficiency and connectivity.
- Improve coordination across transport modes and between access and visitor economy marketing activities, to ensure that tourism campaigns, scheduling and capacity decisions are better aligned across air and sea services.

TASMANIAN

Tasmanian Government

June 2026