

The Candlestick, Cape Horn, photo Jason Charles Hill

2030

VISITOR ECONOMY STRATEGY

TASMANIA



Tourism Industry  
Council Tasmania



## Acknowledgement

We acknowledge the Tasmanian Aboriginal people and their enduring custodianship of Tasmania.

We honour the uninterrupted care, protection and belonging to these islands and their skies and waterways, before the invasion and colonisation of European settlement.

As part of 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.

## Premier foreword

Tasmania's future is strong. Our visitor economy has consistently proven its value and importance for every corner of Tasmania – but we cannot take this for granted.

Tasmania is in a strong position as a visitor destination, and the time is right to consider our longer-term vision and direction. Through our long-standing T21 partnership with industry, we have been carefully considering this and planning for our future.

In the 2030 Visitor Economy Strategy, we recognise what is special about Tasmania, what we intend to do to protect that and how we will realise our future vision.

The visitor economy shares benefits well beyond tourism and hospitality. The tourism and hospitality sector has fostered some of Tasmania's finest innovators and entrepreneurs who are showcasing Tasmania and enhancing our credentials. Together with our Hospitality 2030 Vision, this Strategy will encourage more of this and our positive impact agenda.

The Strategy outlines what the Tasmanian Government will do to deliver on our collective vision and key directions – in collaboration and partnership with industry. Many government agencies contribute to this, requiring a clear agenda and coordination – the Strategy provides clarity, and the T21 governance provides the framework and connection to succeed.

We are well positioned with a bold and ambitious plan for the future to ensure our visitor economy continues to provide the most positive impact for Tasmania.



**Jeremy Rockliff**

*Premier of Tasmania  
Minister for Tourism and Hospitality*



## Industry foreword

For nearly three decades, the Tasmanian tourism industry has worked in partnership with successive State Governments to develop and implement a detailed strategy that has helped Tasmania become one of the most in-demand destinations in the country.

The previous T21 5-year strategy was vital in ensuring our industry could grow and evolve into a national leader. This strategy came to an end almost at the same time as the COVID pandemic emerged. Many in our industry are still coming to terms with the challenges that a pandemic brings.

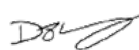
The next strategy, the 2030 Visitor Economy Strategy, will help rebuild the industry and build on the achievements of the past three decades.

The eight key directions set out in this strategy represent what the sector and importantly the community wants the tourism industry to look like in 2030. As the State, our industry and the community has evolved, so too have the challenges and the issues that we need to understand and respond to.

The strategy outlines how the industry will make a positive impact on the community, how it will continue to position Tasmania as a nation-leading destination and, most importantly, articulates exactly what the industry will do and what the Government will do to help us achieve that.

This plan is ambitious. It will challenge both the industry and the Government and it cements Tasmania's place as the nation's leading destination.

Importantly, this plan ensures a strong future for the industry and the community that we belong to.



**Daniel Leeson**

*Chair of Tourism  
Industry Council Tasmania*



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## Purpose of this Strategy

Tasmania is unique in many ways – envied for its natural beauty, history and heritage, small and undeveloped places and the strong sense of community created by the people who live here and care deeply about protecting what is special about our island home.

From humble beginnings, Tasmania’s tourism and hospitality industry has evolved into a celebrated and valued pillar of the Tasmanian economy and our way of life. As a destination, Tasmania has emerged as a place of aspiration and inspiration.

Today, our visitor economy contributes a 6.7% share of Gross State Product – the highest in the country – and provides 12.2% of total Tasmanian jobs, more than agriculture, fishing, forestry and paper production sectors combined<sup>1</sup>.

Tourism has opened new markets for our quality produce, arts and creative pursuits, and supported events and entertainment that has enriched the lifestyles of locals. Tourism underpins access networks linking Tasmanians to mainland Australia and beyond.

Our visitor economy is supported by interstate and international visitors, as well as Tasmanians travelling around our state. Visitor and population growth forecasts indicate that our visitor economy will continue to grow and will remain a leading economic sector for the state. Our vision looks beyond growth and considers the impact visitation has on the Tasmanian economy, community, environment and way of life.

Our challenge in the years ahead is to direct investment into the careful management of our unique island and assets to deliver and manage visitor growth. The things that make Tasmania different are clear, but our vision requires a focus on growing, leveraging and protecting these competitive advantages.

Now is the opportunity to make a difference to our future. This strategy sets out the principles and values that have our Tasmanian brand at their core and will guide our future decision-making.

The purpose of this strategy is to provide our collective longer-term vision for Tasmania’s visitor economy – a vision that provides clarity to our community on what it can expect from our visitor economy, and clarity to industry and government on agreed priorities and accountabilities to achieve this vision for the benefit of Tasmania.

<sup>1</sup>Regional Tourism Satellite Account, Tourism Research Australia, 2020-21

## T21 – Industry and government partnership

The 2030 Visitor Economy Strategy is the latest iteration in the enduring T21 partnership. Over 25 years the Tasmanian Government and the Tasmanian tourism and hospitality industry have worked through this partnership to plan, grow and manage Tasmania’s visitor economy.

T21 is a proven approach to destination management where government and industry come together to agree on shared priorities and measures of success for our industry and destination.

Through T21, we look beyond election cycles, terms of government and market cycles to consider the type of investments, actions and policies that will enable our visitor economy to prosper in the years ahead.

Through this partnership we have shaped the Tasmanian visitor economy to what it is today.

Past agreements have prioritised transformational investment into growing air and sea access to Tasmania, identified priorities for visitor infrastructure investment, evolved Tasmania’s destination brand and steered the tourism industry through major disruptions, including most recently, providing a guiding light to respond strategically to the disruption of the pandemic.

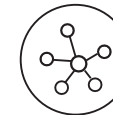


### What does the strategy mean for community?

It strives to make a positive impact in those areas that Tasmanians value and that the visitor economy can influence.

Enables Tasmanians to contribute to the vision and priorities for the visitor economy.

Outlines how Tasmanians can benefit from the visitor economy.



### What does the strategy mean for industry?

It sets out a common vision, values and priorities for the sector.

Provides certainty and confidence for decision making and investment.

Outlines what government will do to enable and support industry.



### What does the strategy mean for government?

It provides the principles and priorities for future investment.

Enables coordination and collaboration across areas of government that contribute to a prosperous visitor economy.

Outlines the priorities of industry.



Mona Foma/photo: Jarrad Seng

## Positive impact: a new approach for our visitor economy

The 2030 Visitor Economy Strategy is a plan for growth — and a plan to manage growth sustainably.

We want to protect the things that make Tasmania different and grow the value the visitor economy delivers for industry, our regional communities and our state as a whole.

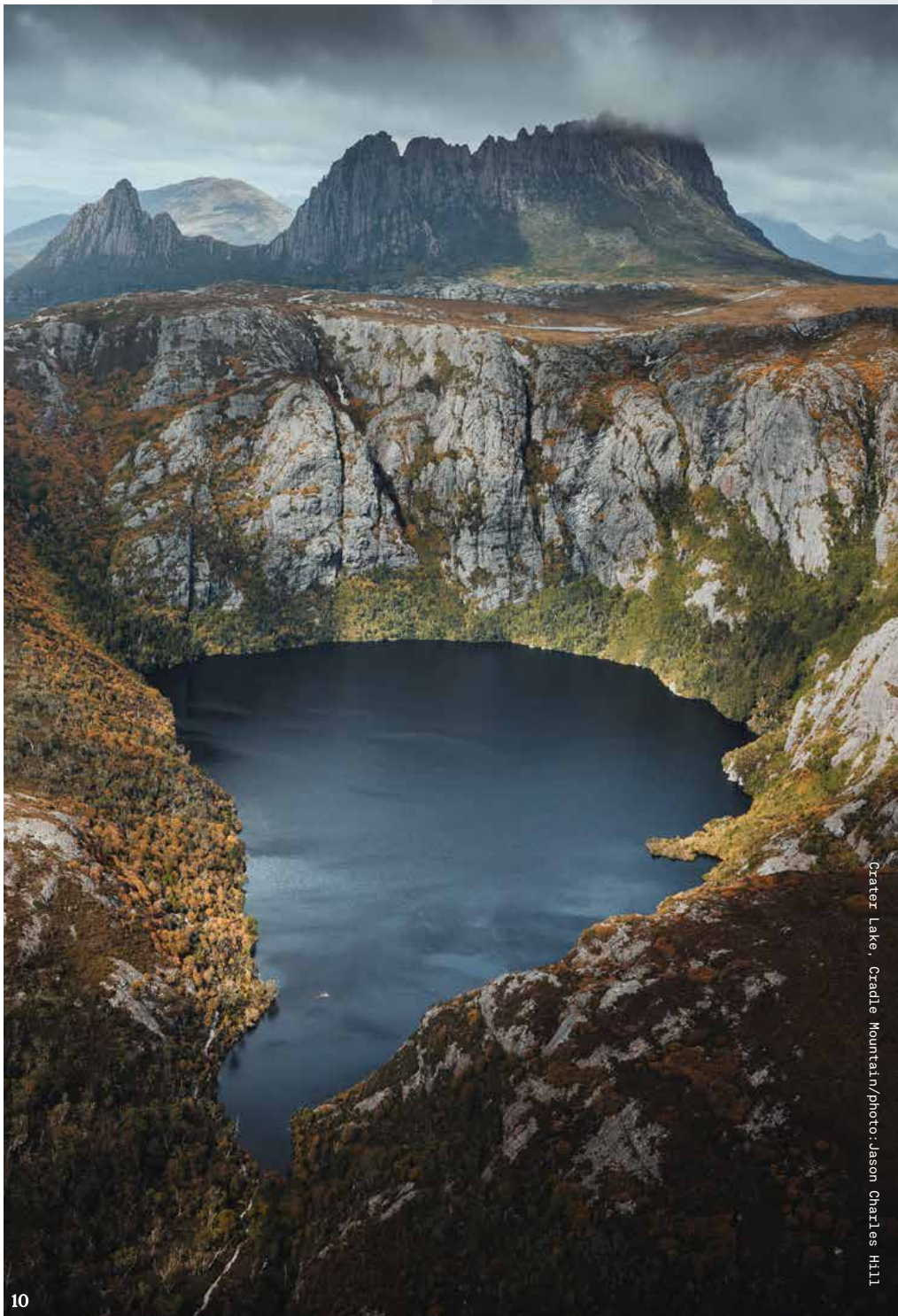
The things that make Tasmania a special place to live are the very same things that make the state attractive to visitors.

Growth is important for Tasmania's future, but growth also needs to be managed to protect what we value most.

This strategy sets the vision that by 2030, the visitor economy will continue to be valued by Tasmanians for its positive impact to our environment, prosperity and way of life, and that Tasmania will be valued by visitors for being a genuinely different experience.

We must be bold and ambitious to achieve this vision and that is why we are determined to achieve real outcomes in the following areas:

- **Enhance Tasmania's appeal as a winter destination** and attract **year-round visitor spend across the state** through destination marketing, infrastructure investment and events.
- **Grow the financial contribution of visitors to Tasmania**, directly supporting conservation and management of our protected areas and infrastructure in our local communities.
- **Embrace Tasmania's net zero emissions future** by supporting tourism and hospitality operators to actively engage in emissions reduction activities, sustainability practices and the circular economy.
- **Develop and deliver a 10-year infrastructure plan** for the visitor economy that prioritises and costs investment by all levels of government to facilitate sustainable growth across the state benefitting locals and visitors.
- **Grow job and training opportunities for Tasmanians** of all ages and backgrounds wanting to participate in a growing visitor economy.



Crater Lake, Cradle Mountain / photo: Jason Charles Hill

## The things that make Tasmania different

The things that make Tasmania such a special place to live are the very same things that make the state a compelling brand proposition to visitors:

- nature and wildlife like nowhere else
- casual, down-to-earth people who have time for you
- a place that lets you feel off-grid, without being remote
- self-sufficient in renewable electricity and net-zero emissions
- a pace of life that gives you time to let everything seep in
- over half our lands and waters protected for their natural and cultural values
- small islands with a long history
- a community vibe that awakens your convivial side
- a winter that wakes you up
- world-class produce where you can still talk to the owner
- an off-beat quality that is definitely not mainland; and
- a thriving arts and culture scene to inspire you.

## Our vision

By 2030, the visitor economy will continue to be valued by Tasmanians for its positive impact to our environment, prosperity and way of life, and Tasmania will be valued by visitors for being a genuinely different experience.

## Our mission

To promote and protect Tasmania through a visitor economy that champions our natural environment, grows our prosperity, and empowers visitors to make a positive impact to island life.

## Our values



We make a difference to our people, our place, and the planet.

We're for having the courage to embrace what is different and special about this place and its people. We care about making a positive difference to Tasmania.



We are champions of our natural environment.

The beauty of our landscape underpins the Tasmanian way of life. Our natural environment is finite and precious, core to our reputation and integral to our brand.



We are creatives, entrepreneurs and innovators.

We're a vibrant community of people who think differently and do things differently. We're about passion, hard work and ingenuity.



We share Tasmanian culture and heritage.

We're for authenticity, our communities and Tasmanian experiences that reflect our place and what it is to be Tasmanian.



We care about being the best we can be.

Our ambitions are bold and aligned to the highest possible standards.

# The importance of Tasmania's visitor economy

The visitor economy is a large and important sector for Tasmania. It is valued by Tasmanians for its contribution to the economy and jobs – providing more jobs than agriculture, fishing, forestry and paper production sectors combined.

Tasmania's visitor economy comprises the wide range of industries that provide goods and services to visitors who travel to Tasmania for a variety of purposes including for holidays, visiting family and friends, events, business and education. Its contribution to the state will continue to grow but will require careful investment and management.

Prior to the pandemic, growth in the tourism industry outpaced that of the overall economy, increasing its importance to the prosperity of the state. In 2022, with international visitors still at less than a quarter of pre-pandemic levels, the visitor economy contributed 6.7% of Tasmania's Gross State Product, the highest contribution in the country.

As one of the most geographically dispersed sectors, tourism shares benefits broadly. Employment provided by tourism, directly and indirectly, remains significant despite the impacts of the pandemic, comprising 12.2% of total Tasmanian employment.

Tourism activity and visitor expenditure in Tasmania flows on to industries beyond tourism, including administrative services, finance, rental and hiring, manufacturing, professional services, agriculture and construction. For Tasmanians, tourism also brings undeniable lifestyle benefits that may not otherwise be provided including amenities, food and wine and increased choice and value in access on and off the island.

In 2018-19, tourism exports of more than \$1 billion represented 22% of all exports from Tasmania, and more than 90% of all service exports. In 2021-22, as the sector recovered from the impacts of COVID-19, tourism exports represented around 8% of \$5.2 billion in goods and services from Tasmania.

In no other Australian state or territory does tourism make a greater contribution.



## Employment<sup>1</sup>

37,300 total Tasmanian jobs

12.2% share

More than agriculture, fishing, forestry and paper production combined

Higher than national average

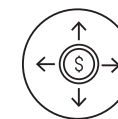
Highest in the country



## Growth<sup>2</sup>

Growth in tourism outpaced that of the overall Tasmanian economy

No other state or territory where tourism makes a greater contribution



## Tourism exports<sup>4</sup>

One fifth of all Tasmania's exports are tourism

Tourism is 90% of all Tasmania's service exports



## Gross State Product<sup>1</sup>

\$2.59B total contribution

6.7% share

Highest in the country



## Visitor spend<sup>3</sup>

\$3.96B or 159% of 2019

Domestic spend



## Visitors<sup>3</sup>

1.3M or 99% of 2019

(Year end March 2023)

<sup>1</sup>Regional Tourism Satellite Account, Tourism Research Australia, 2021-22

<sup>2</sup>State Tourism Satellite Account, Tourism Research Australia, 2020-21. For ten years to 2019, compound annual growth rate for direct tourism GDP was 3.4% per annum while economy wide growth rate was 3.4% per annum

<sup>3</sup>Tasmania Visitor Survey, International and National Visitor Surveys

<sup>4</sup>5368.0 International Trade in Goods and Services, Australia and 5368.0.55.003 International Trade: Supplementary Information, Australian Bureau of Statistics, 2021-22

### DIFFERENCE BETWEEN GSP AND VISITOR SPEND

While visitor expenditure represents the pure financial trade flow and is often a more tangible and well understood metric, GSP reflects the specific value associated with that activity. GSP adjusts for items such as imports, taxes and margins, which are not considered as part of the value contributed by the tourism sector to the economy (i.e. imports are flows outside of the Tasmania economy, while taxes and margins are flows that are attributed to other industries).

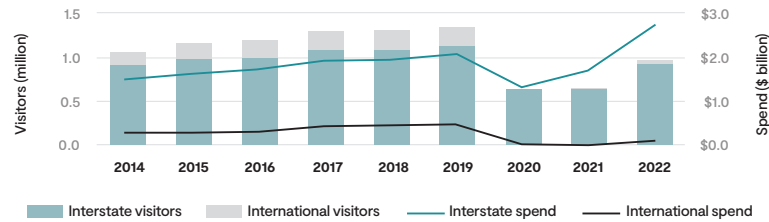


# The profile of tourism in Tasmania

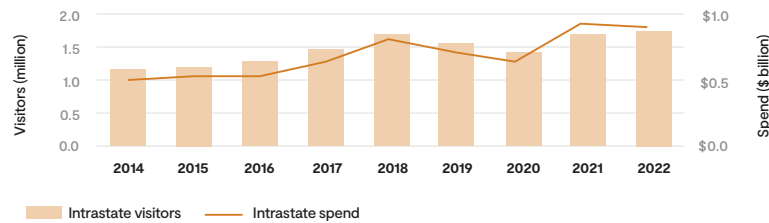
In 2019, 1.4 million interstate and international visitors spent a total of over \$2.7 billion in Tasmania. The visitor economy's contribution to employment and Gross State Product in Tasmania is the highest in the country.

In 2022, with international visitors still at less than a quarter of pre-pandemic levels, interstate and international tourism expenditure had rebounded to \$3.4 billion, exceeding pre-pandemic levels. When considering intrastate travel by Tasmanians, total visitation spend in Tasmania reached almost \$4.3 billion in 2022.

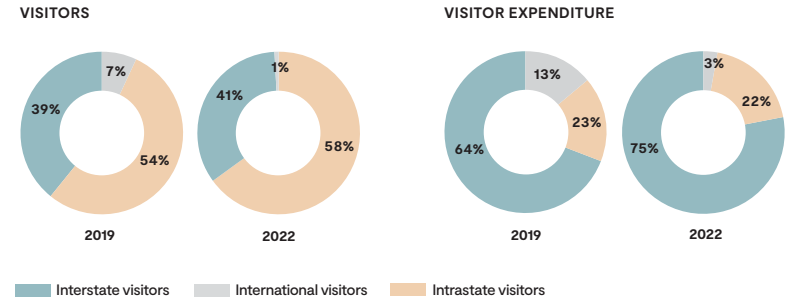
## INTERNATIONAL AND INTERSTATE VISITORS AND SPEND



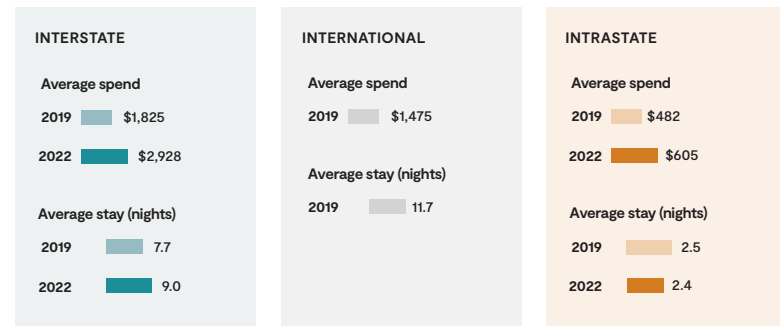
## TRIPS AND SPEND BY TASMANIANS



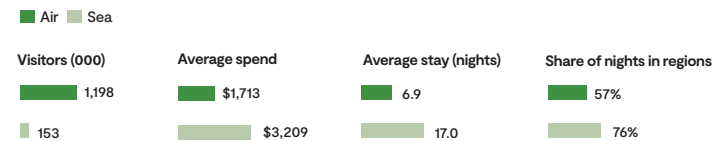
## WHAT IS OUR MIX OF VISITORS AND VISITOR EXPENDITURE?



## HOW MUCH DO OUR VISITORS SPEND AND HOW LONG DO THEY STAY?



## A LOOK AT VISITORS WHO ARRIVE BY AIR AND SEA



Note: Data for 2019, interstate and international visitors only. Share of nights in region are nights outside of Hobart and the South tourism region. Scheduled air and sea services, excluding cruise ships.

Sources:  
 Tourism Research Australia, National Visitor Survey, 2014-22  
 Tourism Tasmania, Tasmanian Visitor Survey, 2014-22  
 Notes: Data is year ending December. Average length of stay figures for international exclude education visitors. All figures reflect only overnight trips.

## Economic context

Our strategy is being released at a time of strong momentum after three pandemic years moderated by continuing uncertainty around the global economy and geopolitical landscape.

Across the world and here in Australia, economic growth has slowed and uncertainty around the global economic outlook has increased. This slowdown reflects the impact of rising inflation and supply chain challenges which emerged in the aftermath of the pandemic. China's recent steps to open its economy is proving a buffer for the slowing global economic growth profile and will provide important momentum for the recovery of inbound travel to Australia. In January the International Monetary Fund revised its global growth forecast upward in light of China's reopening. Despite this, economic growth is broadly expected to continue slowing in Australia over 2023 before picking up again in 2024 and beyond.

Discretionary expenditure and consumer sentiment have declined in the face of inflationary pressures and increasing interest rates, which is expected to continue over the short term. The latest interest rate rises from the Reserve Bank of Australia have put pressure on households, with nearly a quarter of mortgage holders at risk of mortgage stress<sup>1</sup> and has seen retail spending slow. Indeed, household consumption is expected to decline in real terms to mid-2023, with only a slow recovery over the next few years. High inflation and relatively weak growth in wages mean that real household disposable income per capita is expected to fall notably this year and only begin recovering in late 2024. With foreign interest rates higher and likely to increase further, and commodity prices declining from their recent peaks, the Australian dollar is expected to decline from its current level over the next year or so. Longer-term the Australian dollar is expected to remain around the levels seen over the past decade.

While concerns around the cost of living are top of mind and disposable income is tightening, demand for travel is proving resilient – so far. In a global study<sup>2</sup>, the majority of respondents in 24 countries are planning leisure travel, and 31% are planning an international leisure flight in the coming three months. The travel intentions of Australians, who have been the mainstay of the sector over the last three years, also remain strong, with one third planning a domestic leisure flight in the three months.

<sup>1</sup>Roy Morgan

<sup>2</sup>Deloitte Global State of the Consumer Tracker



Mount Gnomon Farm/photo: Jasper Da Seymour

## Forces shaping global travel

As well as the economic context, our future visitor economy is influenced by global forces of change that are impacting travel, where new opportunities are opening up and what an industry “fit for future” might look like. The following global forces are particularly relevant to consider in planning for Tasmania’s future visitor economy:



### De-globalisation

Flexibility and versatility will be paramount as the travel industry seeks to rebuild — a focus should go beyond rebuilding existing aviation and travel routes to identifying new business opportunities and diversification.

Net-zero emissions will continue to dominate discussions.

Seamless travel experiences to encourage both leisure and business will require alleviating staff shortages through more flexibility and engagement with employees.



### Technology

Enabling engaging personalised experiences and providing information to help travellers make decisions in line with their values and needs, reducing the burden of research.

Seamless customer experiences, allowing greater flexibility and reducing wait times.

Creating spaces that cater for leisure and remote work.

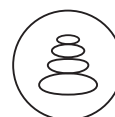


### Travel with purpose

The shift from prioritising short-term visitor numbers to a system that focuses on longevity of destinations will meet consumer expectations around sustainability, and limit damage to places.

Creating a collaborative relationship, drawing from and building on local communities’ resources and skills will be a key step in building a sustainable future for tourism.

Partnering with third party platforms to deepen engagement with low and zero-impact travel behaviours helping organisations and individuals meet their sustainable commitments.



### Wellness

Wellness is set to grow exponentially, and travellers will increasingly place importance on how spaces make them feel.

Consumers are being ‘influenced’ by the rise of wellness brands and representation of wellness — we need to understand the influences shaping our core markets.

Cultural sensitivity and authenticity is essential.



### Luxury and exclusivity

The relationship between exclusivity and luxury remains unbroken, but social media has made achieving the former more difficult — restricted sales, limited numbers and waitlists help create hype around destinations and experiences.

Untouched destinations are harder to find and the new frontier lies in unknown locations and extreme habitats.

Security, comfort and service remain core pillars of luxury travel — adventure and wild experiences should not come at the cost of luxury.



### Health to wealth

The concerns for health are now shifting to concerns about wealth in an environment where discretionary expenditure and consumer sentiment have declined in the face of inflationary pressures and increasing interest rates.

# The outlook for visitor economy growth

To understand the potential shape of future growth, we commissioned Deloitte Access Economics to provide a 2030 forecast of visitor demand – what numbers of visitors might look like, along with the associated visitor expenditure. This helps us to understand the future, reduce uncertainty, and anticipate change enabling better planning and implementation of strategies to achieve our desired vision.

The 2030 outlook for Tasmania's visitor economy signals continued growth in visitors and associated expenditure, along with growth in travel by Tasmanians around the state and the spend benefit this provides. This data is essential in informing the measures we must put in place to support and manage future growth to achieve our vision.

By 2030, Tasmania is set to welcome 1.6 million interstate visitors and 400,000 international visitors. Together, this represents an additional 750,000 visitors to Tasmania by the end of the forecast horizon in 2030, with an average growth of 2.6% per annum from 2025 to 2030.

The associated annual visitor expenditure from international and interstate visitors could grow to \$5.6 billion by 2030, more than double the value at 2019, with an average annual growth of 4.8% across 2025 to 2030.

From 2025, after the market settles following the disruption from the COVID-19 pandemic, spending associated with international visitors is expected to grow at a faster rate than that of interstate visitors, 6.2% versus 4.6% nominal growth per annum.

Population growth, combined with an increasing number of intrastate trips per capita, will help boost travel by Tasmanians to an estimated 2.6 million trips by 2030, an additional 1.0 million trips relative to 2019. Visitor spend by Tasmanians is expected to reach \$1.4 billion by the end of 2030.

## HOW WE HAVE PREPARED THE 2030 FORECASTS

The tourism visitor forecasts are underpinned by a Deloitte Access Economics' in-house tourism forecasting model, an unconstrained demand system model taking into account:

- historical trends and linkages between tourism demand and macroeconomic drivers; and
- bespoke research related to the impacts on travel behaviour and decisions of COVID-19.

The econometric model and inferred COVID-19 adjustments have been specifically customised to the Tasmanian tourism sector.

The key COVID-19 related impacts for Tasmania include:

1. A small amount of remaining pent-up demand from recently opened source markets (e.g. China).
2. Consideration of a potential permanent shift in business travel behaviour as a result of virtual technology take-up.  
After a review of the latest business-based travel performance and expected business events calendar, this was deemed not relevant for Tasmania.
3. Supply side capacity constraints, which were modelled based on the trajectory of the supply rebound (i.e. aviation movements and seats) relative to demand. The analysis revealed that while supply had been recovering well, there was still a small amount of lag time in the recovery of capacity relative to demand which is reflected in the marginal constraint forecasts through the remainder of 2023.

It is important to note, these forecasts reflect the outlook for tourism demand in Tasmania to the extent that specific future demand driving interventions reflect practices of the past.

Any activity or investment undertaken over and above historical trends would be expected to generate an uplift in visitor demand beyond that of these 'baseline' forecasts.

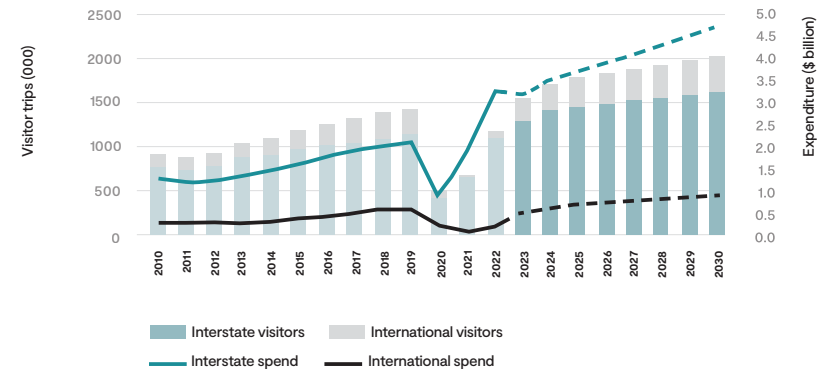
Similarly, the forecasts do not implicitly account for any future trends, such as a shift of preferences to nature based or sustainable tourism options, in visitor behaviour. Any such changes in behaviour or traveller decision drivers would also be expected to result in a deviation away from these 'baseline' visitor forecasts.

Visitor forecasts are converted to an outlook for expenditure based on assumptions on visitor behaviour including average length of trip and spend per night.

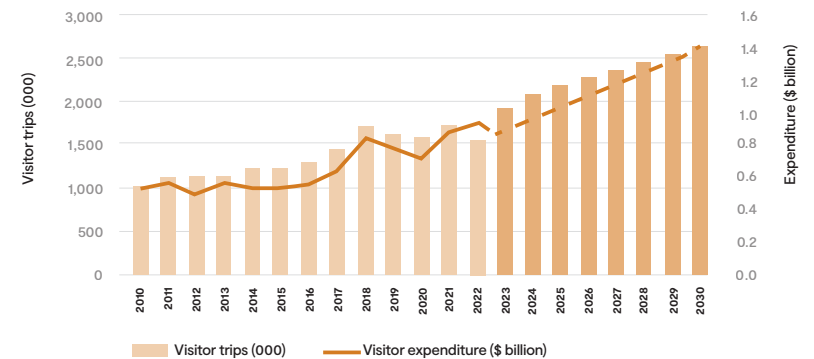
Average length of trip is set based on the three-year average to 2019. This assumption is reflective of recent trends in the historical data series for average length of trip, which tends to average around an equilibrium point year on year.

Spend per night is set using 2019 as a starting point and then indexed to 2022 based on a travel sector consumer price index (CPI) and thereafter indexed to broader state-level forecast inflation. This approach acknowledges recent practices in the Tasmanian tourism sector of improvements in quality of product and consistency with price expectations of the visitor market.

INTERSTATE AND INTERNATIONAL VISITOR AND SPEND FORECAST TO 2030



TASMANIAN TRIPS AND SPEND FORECAST TO 2030



Source: Deloitte Access Economics, Tourism Forecasting Model (TFM)

## Eight key directions for positive impact

Tasmania is an attractive destination, and we expect continued growth. We will proactively manage growth to protect and enhance Tasmania’s brand, environment and community values.

Over many decades, our visitor economy has created substantial value for Tasmania and Tasmanians.

While concerns around the cost of living are top of mind and disposable income is tightening, demand for travel is proving remarkably resilient.

Tasmania will continue to be a sought-after destination for visitors and popular with a growing population of Tasmanians wanting to explore their home state.

We have the opportunity now to proactively manage growth to protect and enhance Tasmania’s brand, environment and community values.

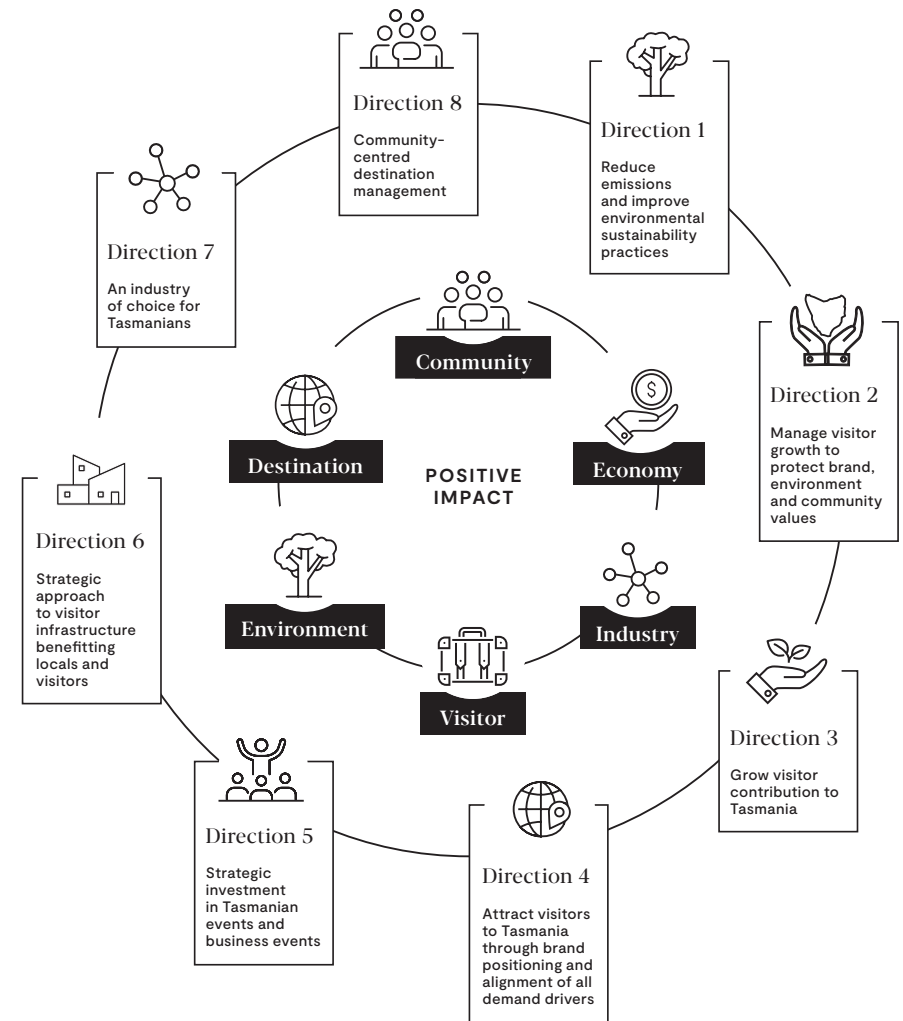
Our vision for Tasmania’s visitor economy is that it maximises the good, minimises the harm, and shares the benefits broadly.

This is what we mean by positive impact.

This will require purposeful actions, informed by data and research, and governed by a strong commitment by industry and government to be connected to our long-term vision.

This strategy sets out eight key directions to grow and manage our visitor economy into the future:

1. We will be a leading destination for climate-conscious travel.
2. We will proactively manage growth to protect and enhance Tasmania’s brand, environment and community values.
3. We will grow the contribution that visitors make to Tasmania and maximise overall benefit to our state and regional communities.
4. We will differentiate and build awareness of Tasmania to increase brand power and attract the visitors who will grow value over volume.
5. We will invest in and support a sustainable and successful events and business events sector, enhancing Tasmania’s brand.
6. We will plan for and invest in infrastructure for the next decade to support future growth, benefitting locals and visitors.
7. We will attract a skilled workforce creating jobs for Tasmanians and meeting industry needs.
8. We will bring industry, state and local government together with local communities in managing destinations.



## Key Direction 1



### Reduce emissions and improve environmental sustainability practices

We will be a leading destination for climate-conscious travel.

Tasmania has a nation-leading emissions profile, having recorded net zero emissions for the last seven years. As the world's largest carbon sink<sup>1</sup>, our reserves and managed estate help underpin our net zero emissions position. Despite this, we are not immune to the impacts of a changing climate and there is a continuing focus on transitioning to a low emissions economy<sup>2</sup>.

Tourism and hospitality is one of Tasmania's most valuable sectors and we must play our part in reducing our emissions, aligned with *Tasmania's Climate Change Action Plan 2023-25*.

Consumer purchase decisions are increasingly influenced by the sustainability credentials of both product and company. Globally, transport is one of the main sources of carbon emissions, highlighting the role that the tourism sector must play in reducing emissions.

In this context, responsible destinations throughout the world are acting decisively to reduce their emissions footprint and operate more sustainably.

Our responsibility goes beyond carbon. We will reduce our environmental impact as part of the state's move to a more circular economy<sup>3</sup>.

There are practical and significant opportunities for our sector to positively impact Tasmania — recycling and waste management, electrifying vehicles, buying local, and working together on emission reduction initiatives.

The Tasmanian Government will:

- Support Tasmanian tourism and hospitality operators, their supply chains, and local destinations to reduce their emissions and participate in the circular economy.
- Market and promote operators recognised for emissions reduction and broader sustainability achievements.

Industry will:

- Embrace the net zero emissions future, by engaging in emissions accounting, monitoring and reduction initiatives, along with the circular economy.
- Measure and be accountable for the scale of our emissions footprint.

Together, we will:

- Enable visitors to opt into a net zero emissions visit by 2025 and make a direct positive contribution to Tasmania prioritising local offsets.

<sup>1</sup> UNESCO, WRI and IUCN, 2021

<sup>2</sup> Tasmania's Climate Change Action Plan 2023-25

<sup>3</sup> Draft Tasmanian Waste and Resource Recovery Strategy 2022-2025

## Key Direction 2



### Manage visitor growth to protect brand, environment and community values

We will proactively manage growth to protect and enhance Tasmania's brand, environment and community values.

Tasmania will continue to be a must-see destination and we can expect continued visitor growth. The attraction of Tasmania for visitors is largely based in our inherent natural and cultural values — important beyond their tourism and brand value. While visitor growth provides benefits, it also presents challenges, and we need to manage visitation to Tasmania at sustainable levels.

There are constraints to growth — access to Tasmania as an island state, accommodation, workforce and transport availability. Aspirations for tourism also vary across our communities, as do the capacities of our natural areas and smaller communities to cater for larger numbers of visitors at one time.

These present limits and thresholds that if exceeded can damage tourism's relationship with Tasmanians, impact our environment, sensitive locations and erode visitor experience and brand reputation.

We will proactively plan for and manage future growth to protect and enhance our brand, environment and community values.

The Tasmanian Government will:

- Invest in visitor forecasts and other data, work with local government and other partners to share information and invest in destination management that considers environment, community values and brand.
- Develop and implement a 10-year visitor economy infrastructure plan to support future growth that benefits locals and visitors and aligns investment across access, capacity and experiences.
- Develop an approach to carrying capacity, considering cumulative impacts, limits and thresholds and investigate options to manage impacts and growth.

Industry will:

- Continue to operate according to the highest regulatory standards for Tasmania's protected areas and reserves.
- Grow our contribution to land management agencies to increase resources for conservation and management.

Together, we will:

- Invest in initiatives that reduce pressure in peak times, prioritising year-round visitation and growth.
- Collaborate on ways to improve visitor management to minimise the impact of visitor activity on their amenity and conservation value.

## Key Direction 3



### Grow visitor contribution to Tasmania

We will grow the contribution that visitors make to Tasmania and maximise overall benefit to our state and regional communities.

Visitors increasingly care about sustainability and are making decisions with the environment and society in mind. Global trends around purposeful travel and nature-based experiences are also accelerating visitor awareness of the impact of their travel on a destination.

Tasmania has an opportunity to grow the direct contribution visitors make and ensure that the maximum economic benefit remains in Tasmania — reducing leakage of benefits out of the state.

As we manage growth, we will focus on increasing yield — a value over volume strategy. Attracting visitors into our regions, growing visitor nights and visitation in the winter and shoulder seasons along with targeting customer segments aligned with Tasmania's brand will grow value over volume and grow the visitor contribution across the state, with benefits flowing beyond tourism. This will grow visitor expenditure throughout the year and across our regions.

This is not just a question of how much money each person spends in Tasmania — the challenge is to invest more of that economic return into the services and infrastructure to benefit visitors and Tasmanians travelling around our state.

The Tasmanian Government will:

- Pursue opportunities for visitors to contribute directly to the conservation and management of protected areas, and regional services and infrastructure for the benefit of locals and visitors.
- Invest in research to understand the economics of industry and implement strategies to retain maximum benefit in Tasmania and our regions.
- Attract and support investment in developments to grow visitor contribution.

Industry will:

- Champion initiatives that enable visitors to contribute to Tasmania.

Together, we will:

- Identify opportunities to increase the direct contribution of visitors to Tasmania to land management authorities, local government and for other destination management purposes.

Aerial of Bay of Fires/Photo: Stu Gibson



We have an opportunity now to manage tourism growth to protect and enhance Tasmania's brand, environment and community values.

A number of pinch points are emerging where tourism is impacting environment and community values.

We will understand our limits and assess the carrying capacity and cumulative impacts at individual high visitation destinations, attractions and sensitive locations.

We will put in place sources of data as a critical input to our decision making.

Tourism must generate funding to support investment in infrastructure and management of our natural areas and other places to protect what Tasmanians value and our brand.

## Key Direction 4



### Attract visitors to Tasmania through brand positioning and alignment of all demand drivers

We are clear on what makes Tasmania unique and attractive and will differentiate and build awareness of Tasmania to increase brand power and attract the visitors who will grow value over volume.

Tasmania's brand strength in market is strong but we can't take this for granted – domestic and global markets are intensely competitive. The Tasmanian brand must cut through. We will push boundaries, evolving our brand communications by taking risks and genuinely reflecting the extraordinary nature of our place and people.

Digital transformation will improve our competitiveness in a highly disrupted environment – as well as increasing conversion opportunities by connecting operators with partners and direct to consumer.

We will rebuild our international market share with core markets, also looking for diversification opportunities, supporting growth and resilience. We will activate primary markets with PR and distribution partnerships, and direct markets with brand campaigns to build awareness and support direct flight capacity.

We will promote home state travel, also growing pride in what is extraordinary about Tasmania. Aligning key demand drivers and a common strategy will deliver efficiencies and leverage most return for Tasmania's visitor economy.

The Tasmanian Government will:

- Build our long-term brand awareness and consideration via culture brand campaigns that differentiate Tasmania.
- Drive short-term lead generation and conversion throughout the consumer journey via partner activity and our digital ecosystem.
- Strengthen our yield over volume strategy, with clear market interventions designed to stimulate year-round visitation and attraction of visitors to regions.
- Focus on a sustainable approach to international education with an emphasis on community, workforce, student experience, destination and brand.

Industry will:

- Engage with and leverage destination marketing strategies and tactics that increase conversion and grow the visitor experience.

Together, we will:

- Grow non-peak seasons via major winter campaigns and industry engagement.
- Partner with Tourism Australia and global travel stakeholders in growing Tasmania's global presence.

## Key Direction 5



### Strategic investment in Tasmanian events and business events

We will invest in and support a sustainable and successful events and business events sector, enhancing Tasmania's brand.

A strategic events program, aligned to the destination strategy and brand, is an important lever to target seasonality gaps and specific market segments – growing length of stay and visitor spend across the state. We will support a strong events sector, promote investment, grow regional skills and capacity, and maximise the value and return on investments for events.

Tasmania's reputation as a destination for business events is growing. We are focussed on attracting high yielding travellers particularly out of peak season, bringing broader benefits through flow-on leisure travel, repeat visitation and global trade, investment and talent acquisition opportunities. We are focussed on investing in infrastructure that will enable Tasmania to attract events growing benefits and also providing opportunities not previously available to Tasmanians.

The Tasmanian Government will:

- Deliver a five-year events strategy to enhance Tasmania's events calendar, growing our visitor economy, providing social benefits and creating an exemplar for the brand of Tasmania.
- Prioritise events that are unique to Tasmania, contribute to our environment, wellbeing, connectedness and incorporate a genuine recognition of our island and its people.
- Invest in data and research to inform the strategic growth and positive impacts of events and business events.
- Invest in events infrastructure across the state.

Industry will:

- Attract high-yielding and seasonally aligned business events supported by development of product, experiences and industry capability to support delegate experience and broader economic benefits.
- Champion Tasmania's seasonal events strategy with support for cultural and participation-based events.
- Deliver a tourism/trade aligned strategy to attract business events that provide economic benefits throughout the state.

Together, we will:

- Grow the capacity and professionalism of the Tasmanian events industry and align the events sector with the Tasmanian visitor economy
- Champion events that bring visitors to Tasmania during the shoulder and winter periods and generate demand for regional destinations.



## Key Direction 6



### Strategic approach to visitor infrastructure benefitting locals and visitors

We will plan for and invest in infrastructure for the next decade to support and manage future growth, benefitting locals and visitors.

Iconic infrastructure and facilities like mountain bike trails, event venues and visitor facilities in parks and reserves are game-changing for host communities, boosting visitation and local amenity for residents and visitors alike, and providing an influx of investment and employment during and following development.

Roads, toilets and signs are not visitor drawcards but are important hygiene factors in the visitor experience. If growing visitation is not properly catered for, it impacts locals and visitors. The opportunity for positive impact through infrastructure is significant. We will be strategic and have a longer-term lens prioritising investment for the next decade, building on the success of what we are already doing.

Informed by forecasts and other data, and working with state and local partners, we will focus on the sustainable management of our existing assets, the delivery of major projects and local infrastructure and providing a central overview of needs and priorities.

The Tasmanian Government will:

- Develop, with industry and local government, a 10-year infrastructure plan for the visitor economy focussed on priority public infrastructure projects including national parks, roads, airports and aviation investments, events and local council infrastructure.
- Work with all levels of government to fund and progress the 10-year infrastructure plan, and work with industry on options to generate visitor contributions for priority investments.
- Implement a visitor economy infrastructure governance model to provide direction and oversight to priority-based infrastructure planning and delivery.

Industry will:

- Work with government to inform clear priorities for infrastructure investment and advocate for bipartisan support at all levels of government.
- Champion quality commercial tourism infrastructure in keeping with Tasmania's destination brand attributes and the state's strategic positioning.

Together, we will:

- Use this strategy to influence investment and developments that enhance the Tasmanian brand and increase the diversity and quality of our destination.
- Maximise the opportunity for regional destinations from the arrival of the new *Spirit of Tasmania* vessels, including planning for and investing in facilities and services to meet contemporary touring market and regional infrastructure needs.

## Key Direction 7



### An industry of choice for Tasmanians

We will attract a skilled workforce creating jobs for Tasmanians and meeting industry needs.

Our workforce is industry's most important asset.

Creating more employment opportunities for Tasmanians and meaningful life-long, valuable careers is valued by our community right across the state.

To manage further visitor demand, we must attract and retain more people into our workforce across all levels of the industry, including international workers, students and working holiday makers.

Tackling entrenched structural issues, addressing barriers to enter our industry and attracting new generations of Tasmanian tourism and hospitality workers in a competitive job market, requires long-term focus and investment across industry and government.

The Tasmanian Government will:

- Invest in training that is fit for purpose and informed by industry feedback, including from the Tourism and Hospitality Workforce Advisory Committee.
- Invest in a dynamic and responsive vocational training sector with public and private sector training organisations, ensuring training providers achieve training outcomes that meet industry needs.
- Grow our future workforce and jobs for younger Tasmanians through the *Tasmanian Youth Jobs Strategy*, including supporting initiatives within our schools focussed on career pathways, skills and training.

Industry will:

- Prioritise capacity building initiatives within our businesses to implement best practices in employment, ensuring businesses are safe, mentally healthy and welcoming to a diverse workforce.
- Focus on growing diversity across industry and in leadership and build capability in the next generation of industry leaders.

Together, we will:

- Leverage Regional Jobs Hubs to reach more Tasmanians from a broader range of cohorts, including older Tasmanians, youth, migrants, people with disabilities, and long-term unemployed, connecting them to support pathways into tourism and hospitality.
- Advocate for migration policy and settings and expedited visa processing to support industry workforce needs including for skilled migrants.
- Strengthen ties with the tertiary training sector, including the University of Tasmania.
- Prioritise worker accommodation challenges, particularly in regional areas.

## Key Direction 8



### Community-centred destination management

We will bring industry, state and local government together with communities in managing destinations.

Communities make up the fabric of our destinations. Tasmania's communities are intrinsic to our identity as a place and, therefore, our value proposition for visitors.

A successful visitor economy and positive visitor experience are increasingly reliant on host communities who welcome visitors. Our communities have different concerns, values and ambitions. Our approach to destination management is to work with local communities to shape the visitor economy to meet their aspirations, achieving the greatest positive impact.

Through this Strategy, the Tasmanian Government and tourism industry commits to principles of co-design and shared decision-making to support the self-determined participation of Tasmanian Aboriginal people, businesses and organisations in the sector.

Our approach to destination management is to be in harmony with our communities by working together to shape the visitor economy to meet our collective aspirations, achieving the greatest positive impact.

The Tasmanian Government will:

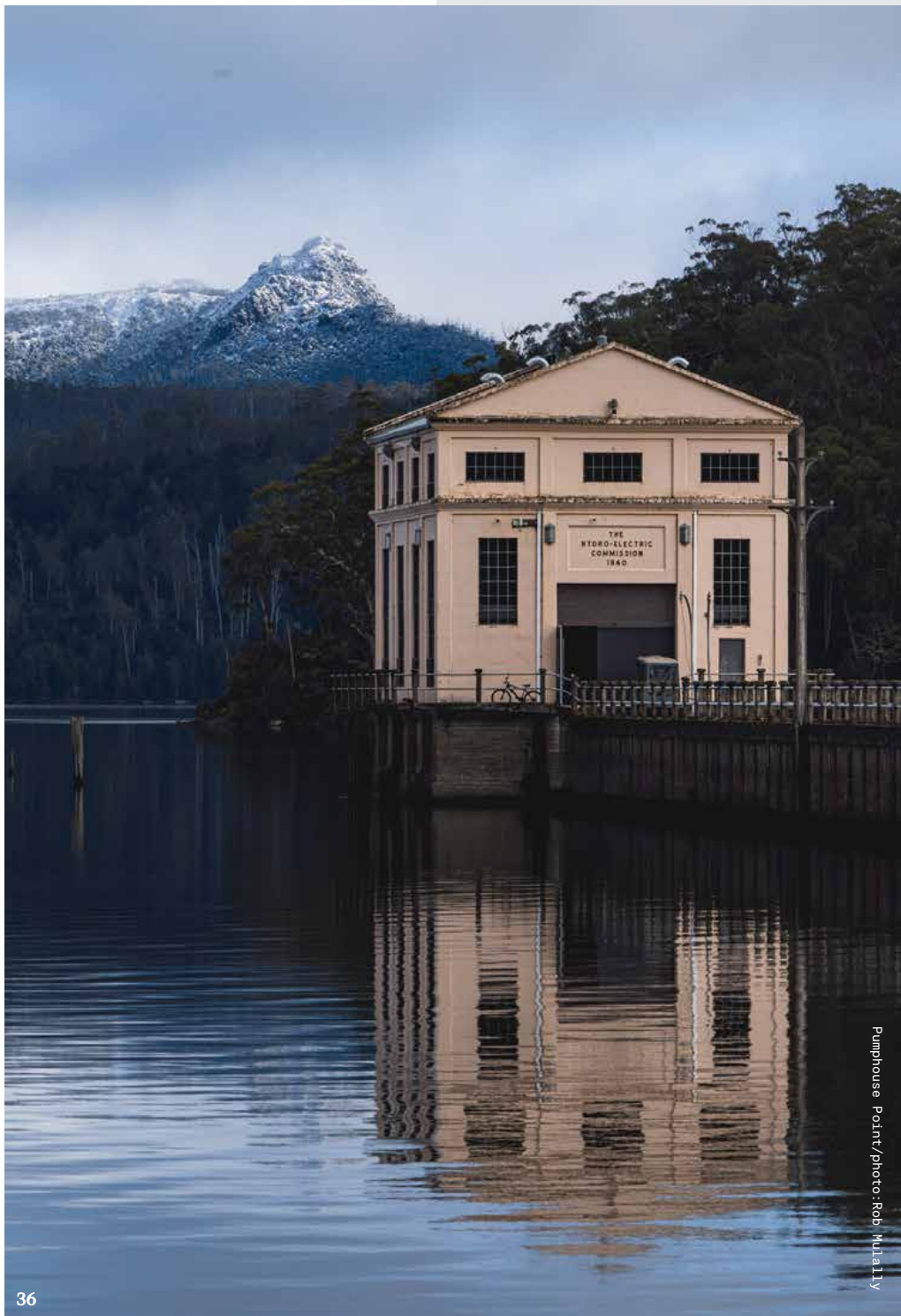
- Invest in community data and research to inform our approach to destination planning and management.
- Embed the principles of this strategy into destination management planning and policy provisions as they relate to the visitor economy.
- Through engagement with Tasmanian Aboriginal people, businesses and organisations develop a process of co-design and shared decision-making with Tasmanian Aboriginal people, work to ensure that the Tasmanian Government's framework and programs of capacity building and tailored business support for Tasmanian Aboriginal tourism businesses are in alignment with identified aspirations and goals, and sit within the *Closing the Gap National Agreement – Tasmanian Implementation Plan* and its four priority reform areas.
- Continue to provide operational funding to support wukalina Walk, Tasmania's award-winning, flagship Aboriginal cultural tourism experience.

Together, we will:

- Develop a framework, centred in this Strategy, that guides regionally-centred destination management.
- Work with local government and Regional Tourism Organisations to identify and respond to destination challenges and opportunities.



Russell Falls - track/photo/Dearna Bond



Pumphouse Point/ photo: Rob Mullaity

In a world that is increasingly busy and stressed, there's a place for those who want to slow down, to reconnect with what matters, and to feel human again.

We invite them to Tasmania, to experience our land and our culture – to live like one of us for a weekend, a week, or a month.

Some of our tourism operators grew up here. Others were called to this place and its culture by their own visits.

All of them deliver a Tasmanian experience that will help our guests feel more human.

This is a decision we make every day, in a place where good enough is never good enough.

It is a privilege and responsibility to care for Tasmania, and to give visitors a meaningful opportunity to connect with and make a positive contribution to this place.

We work harder, we follow our obsessions, we support one another, and we protect what makes this place different.

Our Tasmanian-ness is at the heart of the principles that will guide our future visitor economy.

## Foundations of our future

Our vision for the visitor economy is underpinned by eight key directions that will grow and manage future visitor economy.

Achieving our vision also requires a focus on the foundations of our visitor economy, including:

- An environment that enables investment, fosters standards and reduces barriers to support a prosperous industry growing benefits and opportunities across the state.
- Growing access into and around Tasmania, essential for visitors and Tasmanians.
- Supporting the development of our destinations, products and services to be accessible to visitors and Tasmanians, also offering a significant market opportunity.
- Growing core and emerging markets focussed on Tasmania's unique proposition and fostering the development of authentic Tasmanian experiences will bring the visitor experience and our brand to life.
- Tasmania's protected areas are our destination differentiator – we have an unwavering commitment to visitor activity that is appropriately managed and growing visitor contribution to these special areas.
- A deep understanding of our customers and a priority on digital transformation, essential to our connection and engagement with customers, increasing awareness of our destination and leveraging conversion opportunities.



### A prosperous, resilient and innovative industry

Tasmania's tourism and hospitality operators are the core of our visitor economy. Many nationally awarded, their investment evolves our products and experiences, providing employment, business opportunities and economic growth.

Operators maintain a commitment to high standards of professionalism and business practices, with clear industry frameworks to determine standards.

The operating environment can be demanding for an industry that is predominantly comprised of small businesses, many regionally based, requiring targeted business support<sup>1</sup> to foster growth.

This strategy enables investment, fosters standards and reduces barriers supporting a prosperous, resilient and innovative industry.

We will:

- Stimulate private sector investment in new product.
- Support development of businesses and product consistent with Tasmania's brand proposition and industry accreditation standards.
- Support innovation through an industry and government collaboration to respond to rising businesses costs, including insurance, and reduce regulatory barriers in priority sectors.
- Strengthen industry resilience, capability and destination development through regional and state-wide collaboration and networking initiatives.

<sup>1</sup> Small Business Growth Strategy 2026



### Access into and around Tasmania

As an island destination, affordable and reliable access, both air and sea, is essential for tourism and Tasmanians alike, making it a high priority for government and industry partners. We will maintain and grow frequency, choice and competitive domestic routes. Direct city pairs will increase Tasmania's appeal as a destination, supporting trade and business. Sustainable access into our Bass Strait islands will be supported through growth of markets aligned with community aspirations.

We will grow long term sustainability of the New Zealand route and convert other international opportunities as markets recover. Tasmania's attraction as a touring destination will grow through the new *Spirit of Tasmania* ships. Expansion of alternative ways for visitors to travel around the state beyond self-drive options will be essential including additional electric vehicle options and passenger transport connections.

We will:

- Collaborate across TT Line, government and industry to leverage the opportunity of the new Spirit vessels – demand generation, infrastructure and services.
- Maintain and grow our aviation network including a focus on market driven growth in capacity, direct city pairs, frequency and broader customer segments, considering total value to Tasmania.
- Develop sustainable international flight capability and capacity, exploring future direct services into Asia.
- Develop a renewed Aviation Strategy with Tasmanian airports to build increased and sustainable year-round options for visitors and Tasmanians, including infrastructure.
- Develop a renewed Cruise Shipping Strategy, with industry and partners including TasPorts, focussed on improved data, sustainable growth and growing the value proposition of this market for Tasmania.
- Promote the uptake of electric vehicles and support a state-wide fast charging network to support Tasmania's goal to shift to a low emission economy



## An accessible destination

An ageing population and a significant proportion of Australians living with disability provides industry with an opportunity to better meet the needs of diverse travellers, also a growing market segment.

This is also an opportunity to meet the needs of Tasmanians.

We will enhance positioning in this market and support our destinations, products and services to be accessible to all people.

Public and private investment in visitor facilities, services and infrastructure will grow the accessibility of Tasmania.

We will engage with industry and provide easily accessible resources and tools to improve understanding of, and confidence to invest in, facilities and services with accessibility in mind.

This will enable visitors and Tasmanians to explore and enjoy Tasmania with confidence and choice, enhancing our brand reputation and attractiveness to all visitor markets.

We will:

- Connect and engage industry with accessible tourism tools and resources, including marketing, and work with partners specialising in accessible tourism industry development initiatives.
- Partner with established distribution channels who specialise in accessible tourism to leverage Tasmania's offer.
- Support development of diverse accessible infrastructure and facilities.



## Authentic Tasmanian experiences

Tasmania is known for nature, heritage and history, arts and culture, and produce.

As visitor preferences evolve (such as for wellness, sustainable, agritourism and Tasmanian Aboriginal experiences), new and emerging Tasmanian-specific propositions offer opportunities for market development and diversification.

We will support and enable core and emerging markets to grow sustainably through a model that connects consumer research, marketing, business and product development – in alignment with the Tasmanian brand.

Growth and diversification will be enabled by an operating and regulatory environment that recognises the artisanal and boutique nature of our industry, core to our brand and destination.

We will:

- Support development and innovation in product and experiences prioritising artisanal and built heritage as core strengths, and emerging propositions of sustainability and wellness.
- Prioritise improvements in the operating and regulatory environment for artisanal and boutique operators to support innovation and development aligned with the Tasmanian brand.
- Support appropriate and responsible commercial visitor activities and investment in product and experiences that leverage Tasmania's unique national parks and wilderness areas.
- Support marketing and promotion of existing and emerging businesses and experiences.



## Our Protected Areas

Our protected areas are our destination differentiator. Our nature, landscapes and multi-day walks are a primary reason why visitors come to Tasmania. As the world increasingly recognises the intrinsic value of nature and the environment, scrutiny will grow on the type and scale of tourism activity in these areas.

We will ensure visitor activity is appropriately managed and regulated – with leave no trace our intent, and further, to leave our special places better.

Tasmania's nature tourism sector is an exemplar of our positive impact agenda – leading the way in emissions reduction and conservation projects.

We will grow the contribution that visitors make to these areas – supporting stewardship through conservation investment.

We will:

- Maintain the highest standards and expectations for commercial tourism operators providing experiences in protected areas.
- Invest in systems, processes and models to support contemporary visitor management and contribution.
- Deliver Tasmania's Next Iconic Walk on the West Coast.
- Complete masterplan initiatives in iconic national parks including Cradle Mountain-Lake St Clair, Freycinet National Park and those encompassed by the Tasmanian Wilderness World Heritage Area Tourism Masterplan.
- Support Tasmanian Aboriginal tourism initiatives and programs.



## Connected to customer

Our success is underpinned by a deep knowledge of our target markets and in communicating our destination offering in a uniquely Tasmanian way. This has grown customer connection and loyalty to Tasmania as a brand.

We will connect with customers who value Tasmania.

Research and data is central to this – we will share insights across government and industry to enable investment decisions in product, experiences and our destination, reinforcing our brand.

Investment in digital systems will improve customer connection increasing awareness of our destination and to leverage conversion opportunities for operators direct-to-consumer. The constantly evolving digital environment carries risks and opportunities, and investment in digital capability, platforms and data will future proof our visitor economy.







We will:

- Optimise digital marketing assets, increase connectivity and capability to drive conversion, reduce costs and improve productivity.
- Invest in digital capability, systems and governance to evolve our data maturity to continuously improve data-driven decision-making, improve security and maintain customer trust.
- Evolve our target customer markets and competitor analysis through investment in research and data.
- Share market insights with government and industry to support product investment and destination development.

# Measuring our impact

We will measure our positive impact across six indicators - community, environment, destination, visitor, economy and industry.

Historically the success, or otherwise, of the visitor economy has been measured primarily against economic goals. Aligned with our positive impact agenda, we are seeking to make a difference to Tasmania across a holistic set of indicators. Like-minded destinations around the world are making similar change. Some indicators require development and benchmarks will be set across all indicators to measure our progress - this will be a priority in the first twelve months of the Action Plan.

	OUR GOAL	MEASURING OUR IMPACT
 <b>Community</b>	To be valued by Tasmanians.	More Tasmanians agree tourism has made their community a better place. Grow Tasmanian jobs created by tourism.
 <b>Economy</b>	To grow Tasmania's prosperity.	Visitor spend more than doubles to over \$5 billion by 2030. Intrastate spend grows by more than 75% by 2030 to over \$1.4 billion.
 <b>Environment</b>	To make a positive impact on our environment.	Reduce industry emissions.* Reduce industry waste and increase contribution to the circular economy.* Grow contribution to Tasmania's protected areas.*
 <b>Industry</b>	To be a prosperous, innovative and resilient year-round industry in all regions of Tasmania.	Grow average spend per visitor in the cooler months. Grow the regional share of all visitor nights in Tasmania.
 <b>Destination</b>	To be in harmony with our community.	Implement the ten-year visitor economy infrastructure plan. More Tasmanians agree tourism has made their community a better place.
 <b>Visitor</b>	To be a genuinely different experience empowering visitors to make a positive impact on Tasmania.	Grow the rate that visitors strongly recommend Tasmania as a destination. Grow Tasmania's demand power.*

\*Measures in development



Furneaux Distillery/photo: Jasper Da Seymour

# Tasmanian visitor economy governance

The T21 partnership between the Tasmanian Government and industry is an established and proven governance guiding Tasmania's visitor economy.

The Premier's Visitor Economy Advisory Council (PVEAC), chaired by the Premier as Minister for Tourism and Hospitality, provides the strategic direction for our visitor economy. PVEAC is supported by the T21 Steering Committee that brings together the various Tasmanian Government agencies, Tourism Industry Council of Tasmania and the Tasmanian Hospitality Association to support implementation of, and accountability for, the 2030 Visitor Economy Strategy. Regional Tourism Organisations provide leadership for their regional visitor economy in partnership with local councils who play an important role in tourism; work to develop industry and product; and provide the connection for operators into broader resources and support. The T21 partnership and governance exists to support our industry operators and to grow a valuable visitor economy for Tasmania.

The 2030 Visitor Economy Strategy will be implemented in a series of shorter term Action Plans that will enable focussed attention to delivery and a responsive approach to changing industry needs, the market environment and the broader economic and community context.

