

# REGIONAL TOURISM STRATEGY

2022-2025





*West by North West* acknowledges the ancient history of the Tasmanian Aboriginal people as the First People of lutruwita/Tasmania and honours the Tasmanian Aboriginal Community, men and women, past and present. We thank them for caring for the land, sea and waterways that we showcase and celebrate as a tourism industry; and where we all now live, work and play.





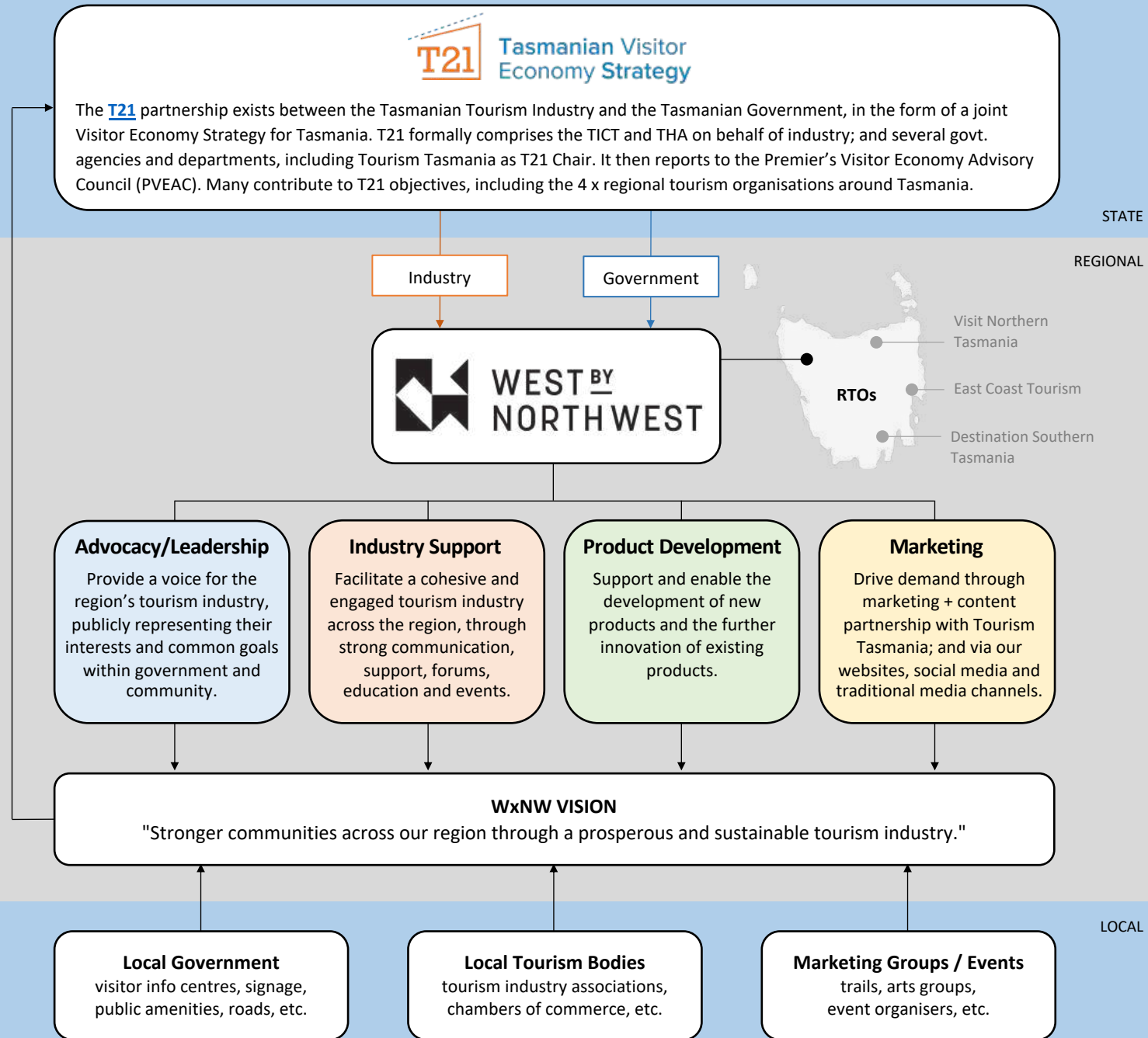
This strategy (or destination management plan) has been developed by *West by North West Regional Tourism (WxNW)*, in collaboration with our region's tourism industry. It provides a 3-year strategic horizon, with actions and KPIs to be reviewed annually. Many have contributed to its creation, building on our previous strategies and laddering clearly and powerfully into the statewide *T21 Visitor Economy Strategy*.

Now, as our region's tourism industry evolves with the opportunities before it, so too should this strategy – an ever-growing document, genuinely owned and led by the community it serves.

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# OUR ROLE IN TOURISM

- WxNW is one of four **regional tourism organisations (RTOs)**, each funded by the Tasmanian government to work with the tourism industry at regional level; and with government at all levels.
- Our work is viewed through **4 x strategic pillars**, that shape our day-to-day operations and regional objectives. *Marketing* is about demand-generation, whereas *Industry Support* and *Product Development* are focused on the supply-side of our industry. *Advocacy* is a function of leadership.
- RTOs are small organisations, but work closely with other teams across government and industry at local, regional, state and federal level.
- As per this diagram, T21 influences tourism strategy at a regional and local level; which in turn feeds back into T21 to inform the continued evolution of Tasmania's overall tourism strategy and reporting into the Minister for Tourism.

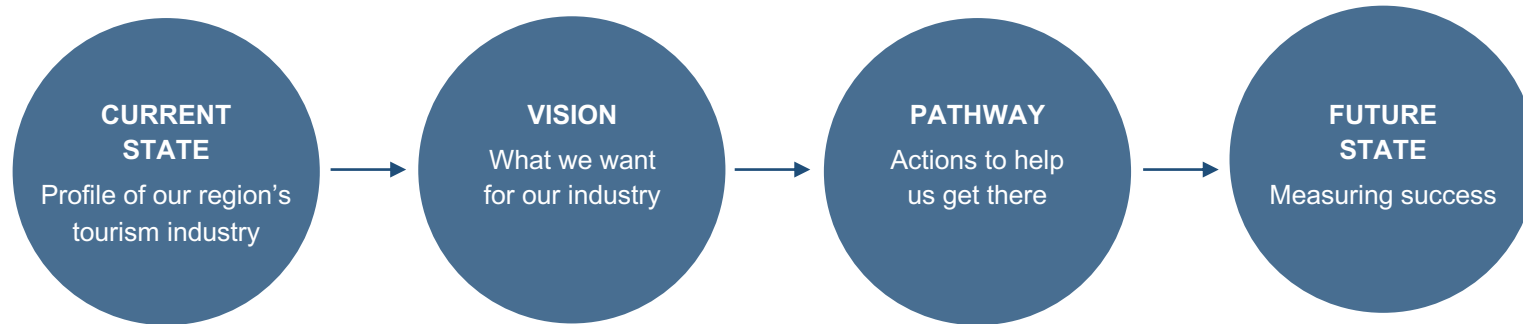


STATE

REGIONAL

LOCAL

# REGIONAL TOURISM STRATEGY



Kramer Photography | Currie Harbour, King Island

**“Strategy is a fancy word for coming up with a long-term plan and putting it into action.”** *Ellie Pidot*



This **SWOT Analysis** is intended to capture the primary considerations for our region. Obviously, it cannot be considered exhaustive, but it hopefully paints a useful picture of the key strengths, weaknesses, opportunities and strengths that currently face our region's tourism industry. It has been (and will be) reviewed at least annually.

## STRENGTHS

Some of the world's purest air + rain  
 International visitor icons inc. Cradle Mountain, Stanley, Strahan, KI golf  
 World's equal-highest rated wilderness world heritage area  
 Vibrant agricultural district – *Tasmania's food-bowl*  
 Tasting Trail  
 Some of the world's best golf courses  
 Access: 3 x airports, Spirit of Tas + established cruise ship port  
 Passionate arts community  
 New world-class MTB trails  
 'Small-town' character and hospitality

## OPPORTUNITIES

Geographic isolation increasingly appealing – regional tourism on the rise  
 Public investment in *Cradle Master-Plan, Tyndalls Walk, Dismal Swamp*, etc.  
 Public investment in MTB + walks infrastructure across the region  
 Improved storytelling of the region's rich indigenous heritage  
 Grow status of adventure tourism (west), agritourism (NW) and golf (KI)  
 Tourism Tasmania's aspiration to be world-class drive touring destination  
 Tourism Tasmania's 'off-season' campaign, improving year-round viability  
 Grow conference + event visitation, leveraging 'newness' of *paranple*  
 Increased capacity of new Spirit ferries  
 Leverage new renewables projects to tell story of region's eco-pursuits  
 Better highlight our space, openness and *freshness*

## WEAKNESSES

Geographic isolation makes travel time a potential barrier  
 Cost of inbound access via air + sea, compared to LTN + HOB  
 Not enough truly unique and world-class tourism offerings (critical mass)  
 Fragmented region (geographically, 9 councils, LTAs, etc.)  
 Cluttered marketing (many websites, brochures, groups, etc.)  
 Community attitude towards tourism/hospitality as career pathway

## THREATS

Current global economic instability  
 Traditionally low demand over winter + shoulder seasons  
 The cost of inbound access remains high, or increases  
 Failure to attract skilled tourism + hospitality workers  
 Failure to improve clustered approach to marketing across region  
 Potential for renewables projects to have visual impact on landscape  
 Ability for large renewables projects to deplete tourism workforce supply

## SUPPLY

Approx. 840 tourism businesses operate across the region in the form of accommodation (45%), attractions (19%), tours, transport, events, dining + info services. This does not include Airbnb, which fluctuates around 1,600 listings. There are three airports, one cruise port and the TT-Line ferry port.

## DEMAND

Pre-covid, our region welcomed over 500,000 visitors annually (38% of all visitors to Tasmania), equating to 2mil visitor nights (19% of all Tasmanian visitor nights) and generating \$462mil into the regional economy. By June 2022, we're at 67% of pre-covid levels.

## STRUCTURE

9 x Local Councils	Population
West Coast Council	4,263
Circular Head Council	8,066
King Island Council	1,612
Waratah-Wynyard Council	14,641
Burnie City Council	20,441
Central Coast Council	23,278
Devonport City Council	26,922
Latrobe Council	12,705
Kentish Council	6,778
<b>Total Region</b>	<b>118,706</b>

## Local Tourism Groups

Destination West Coast  
 Circular Head Tourism Inc.  
 King Island Tourism Inc.  
 Business NorthWest | Tourism  
 Caves to Canyon Tourist Association  
 Waratah Tourism Association  
 Mersey Valley Tourism Group

## Visitor Information Centres

### Yellow i

Devonport, Sheffield, Ulverstone, Wynyard, Strahan & Smithton

### White i

Shearwater, Latrobe, Currie, Cradle Mountain, Penguin, Stanley & Queenstown



The T21 Visitor Economy Strategy pursues a 2030 horizon, whereas this regional tourism ‘sub-strategy’ pursues a shorter 3-year horizon (to 2025). It provides a vision against each strategic pillar and each of our sub-regions\*; all contributing to an overarching WxNW vision for **stronger communities across our region through a sustainable tourism industry.**

What does this mean in practical terms? We review our position in October 2025 against this collective set of visions. We also work towards annual KPIs against each strategic pillar to evaluate our progress.

These regional visions are useful when interpreting and delivering on the statewide T21 Visitor Economy Strategy, allowing us to focus on elements that are of particular relevance to our region.

**At time of drafting this regional strategy (October 2022), the T21 Visitor Economy Strategy is still in consultation, with completion forecast by the end of 2022.** However, we already know the T21 Strategy will focus heavily on Positive Impact Tourism: ensuring the visitor economy provides benefits beyond the tourism industry to the broader Tasmanian community; and that any tourism impact is *objectively positive*.

### VISION by STRATEGIC PILLAR

**Advocacy/Leadership:** Our communities understand and appreciate the value of tourism – sharing the best parts of living in the region with our visitors through stories, experiences and great service.

**Industry Support:** Our industry is engaged and cohesive, positively contributing to our regional community and focused on delivering quality experiences aligned to the region’s strengths.

**Product Development:** With many new and exciting tourism offerings, our region is no longer seen as ‘a long way from Hobart’, but instead a destination that must be visited to experience the best of Tasmania.

**Marketing:** Our region’s destination marketing is collaborative (focusing more on the visitor journey than municipal boundaries) and powerfully aligned with Tourism Tasmania’s work to leverage the state’s significant investment in destination marketing.

### VISION by SUB-REGION

#### WEST COAST

To be recognised as Tasmania’s wilderness adventure-tourism hub, with experiences ranging from soft to hard adventure experiences delivered by a professional and passionate local tourism industry.

#### NORTHWEST

To be Australia’s preeminent agritourism destination, embracing, celebrating and sharing our rich agriculture and iconic wilderness; as a truly *unified* region of passionate tourism professionals.

#### KING ISLAND

To be a bucket-list destination for those seeking indulgent escapes from the modern world; and for golfers seeking the *holy grail* – all delivered as a well coordinated on-island visitor experience.

### VISION by REGION

**Stronger communities across our region through a sustainable tourism industry.**

\*Although it would be convenient to treat these sub-regions together as one destination with a single vision, [a market study we conducted in 2020](#) revealed that visitors view these three sub-regions as distinct destinations with unique characteristics.



## ADVOCACY / LEADERSHIP

**We provide a voice for our region's tourism industry, publicly representing their interests and common goals within government and community.**

We also advocate back the other way, providing a voice for government on tourism matters, to our region's tourism industry and our local communities.

Acknowledging TICT as the *state level* advocate for the tourism industry, the RTO will work closely with TICT to advocate *specifically on behalf of its region*. However, unlike TICT, our advocacy cannot extend to political lobbying, as we are a government-funded organisation and therefore must remain apolitical.

### What we WILL do

- Reflect regional sentiment on state level projects
- Seek action on access issues (air, sea, roads)
- Provide regional context to TICT for their lobbying
- Support emergency response comms to tourism industry
- Represent industry via media + community forums
- Provide letters of support, where appropriate
- Maintain a productive working format with our 9 councils
- Inform positive community mindset towards tourism, thereby attracting staff, investors and entrepreneurs.

### What we WON'T do

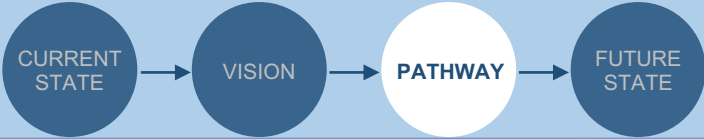
- Political lobbying (this is the role of TICT)
- Unreasonably favour one LGA over others
- Provide letters of support to all who ask
- Publicly comment on matters unrelated to tourism

Function | LEADERSHIP

## PRIORITY INITIATIVES | 2022-2023

- **Skills and Training:** Support T21 to attract and develop talent into our region's tourism industry.
- **Climate Change:** Support T21 in Tasmania's pursuit of carbon neutral status; and help navigate a pathway for our region's tourism industry to prosper alongside *appropriate* renewables projects.
- **Inclusive Tourism:** Work with government and industry to grow awareness of inclusive tourism.
- **Visitor Engagement Model:** Support T21 in developing a contemporary model of visitor engagement, from marketing and booking, to on-ground experiences inc. visitor info. servicing.
- **Visitor Access:** Advocate for improved air and sea access to our region; and for improved road access (hire cars, public transport, tour operators, etc.).
- **King Island Airport:** Advocate for required upgrades to the King Island airport and runway.
- **Major Tourism Projects:** Provide a voice for our region's industry through the *Cradle Mountain Master Plan, Next Iconic Walk, Dismal Swamp and TT-Line* projects – and others.





**PRIORITY INITIATIVES | 2022-2023**

- **Industry Events:** Deliver a calendar of forums and events that respond to the needs of industry as they arise; providing education and networking.
- **Regional Tourism Data:** Improve access to live and comprehensive data on the demand *and* supply side of our region’s tourism industry.
- **Aboriginal Tourism:** Support aboriginal groups and/or entrepreneurs through discussion on tourism opportunities, access to support, etc.
- **Cruise:** Prepare our region’s industry to capitalise on the returning Cruise sector.
- **Council Strategies:** Where required, assist councils to develop a local tourism plan, drawn from this regional strategy.
- **Agritourism:** Support our region’s agritourism community, including those that emerged as a result of last year’s Opening the Gate program.
- **New Spirit Ferries:** Work with industry and with local and state government to prepare for the arrival of the new Spirit of Tasmania ferries.

**INDUSTRY SUPPORT**

**We facilitate a cohesive and engaged tourism industry across the region through:**

**Strong communication:** maintaining regular, transparent communication with all stakeholders at regional and state level across a range of formats/channels including face-to-face, eNewsletters, social media, meetings and presentations; and

**Forums + Events:** curating of a calendar of tourism industry events throughout the year including consultation, education, networking and socialising.

This work is carried out in close partnership with Tourism Tasmania, TICT, our counterpart RTOs and various other bodies.

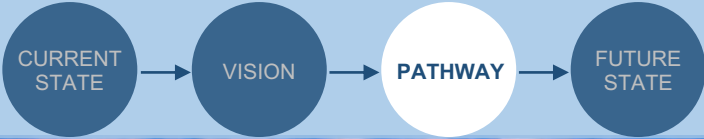
**What we WILL do**

- Industry consultation (inc. T21 strategy, covid response)
- Facilitate liaison between government (state/local) and industry.
- Operator site visits to assist, advise, educate and connect.
- Facilitate operator presentations to Tourism Tasmania.
- Activity relating to charity and social awareness.
- Host events for education, discussion and social/networking.
- Communicate opportunities for grants and/or other funding.

**What we WON'T do**

- Provide unlimited training and support to one operator or municipality.

Function | **SUPPLY-SIDE**



**PRODUCT DEVELOPMENT**

**We support and enable the development of new products and/or the innovation and reinvestment in existing products.**

Tourism product refers to any private sector business or public infrastructure that services the visitor economy, including accommodation providers, tour operators, public signage, events and trails.

We support **new or expanding** tourism developments that align with Tasmania’s brand and vision (private and public) through consultation, advocacy, industry liaison, strategic planning, media/marketing support and by connecting developments with available support services, tools, data, grants or education programs.

<p><b>What we WILL do</b></p> <ul style="list-style-type: none"> <li>• Identification of new product opportunities for the region (Aboriginal, agritourism, adventure and luxury).</li> <li>• Advice + aid for new product development.</li> <li>• Support public infrastructure upgrades (signage, tracks, camping).</li> <li>• Support the growth/enhancement of strategically important ‘cornerstone’ products for the region.</li> <li>• Improve environmental credentials of new/existing products.</li> </ul>	<p><b>What we WON’T do</b></p> <ul style="list-style-type: none"> <li>• Invest, fund or offer any financial support to new or existing products.</li> </ul>
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Function | **SUPPLY-SIDE**

**PRIORITY INITIATIVES | 2022-2023**

- **Dismal Swamp:** Having secured project funding via the Australian government, we now transition to a Tasmanian government project and contribute as a member of the steering committee.
- **Don River Railway:** Support railway in securing funds required for proposed development.
- **West Coast Adventure Tourism:** Grow adventure tourism on WC by leveraging new MTB trails, supporting existing operators and new entrants through the Adventure Tourism Prospectus.
- **King Island Visitor Engagement:** Support development of improved visitor interaction with the island via maps, app, signage and/or interp.
- **Tasting Trail:** Drive the next stage of development, through enhanced membership, experience delivery and growth of the TrailGraze event.
- **Permission to Trespass:** Refine and grow a concept developed by operators in the Wynyard/Table Cape area to offer bookable and exclusive visitor experiences on private properties.
- **West Coast Heritage Tourism:** Support an appraisal of WC heritage tourism, assessing the potential of current assets and potential new ways of sharing the region’s stories with visitors.



## PRIORITY INITIATIVES | 2021-2022

- **Content Generation:** Work with Tourism Tasmania, LTAs and local councils to identify any content gaps in our visual library then manage the creation of content to address those gaps.
- **ATDW Drive:** Complete project funded through Austrade by Nov 2022, then continue to ensure region is well-represented online as a destination.
- **Tasting Trail:** Grow awareness of this regional touring experience via social media, traditional media, website and the TrailGraze event.
- **Destination Websites:** Improve our region's destination websites to optimise user-experience:
  - [northwesttasmania.com.au](http://northwesttasmania.com.au)
  - [tastingtrail.com.au](http://tastingtrail.com.au)
  - [westcoasttas.com.au](http://westcoasttas.com.au) (council-owned)
  - [www.kingisland.org.au](http://www.kingisland.org.au) (council-owned)
- **Social Media:** Improve our region's destination social media performance against agreed metrics.

## MARKETING

We are not resourced to perform in the awareness phase of the Marketing Funnel\*. Instead, we support Tourism Tasmania in creating **awareness of our region** in the visitor market, then provide compelling research tools encouraging conversion, visitation and dispersal.

### We help to drive tourism demand for our region through:

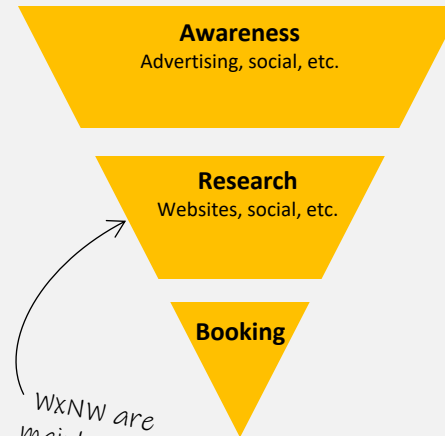
**Strategic marketing partnership with Tourism Tasmania**, making sure WxNW products, places and experiences are featured prominently at all stages of the visitor journey, by being Tourism Tasmania's best content partner.

**Marketing coordination** with state and regional stakeholders to avoid duplication of effort/resource across all phases\*;

**Destination websites and social media** for the region; and

**Public Relations** where appropriate, to generate media coverage for the region's tourism offerings (*Awareness* phase).

### \*VISITOR JOURNEY | Marketing Funnel



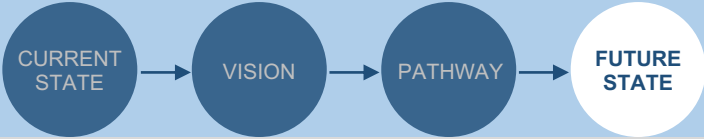
### What we WILL do

- Create compelling visual content (image, video, written).
- Facilitate media + visiting journalists/influencers.
- Manage/support destination websites and social platforms for North West, King Island, West Coast and the Tasting Trail.
- Ensure all marketing communication is aligned to an agreed and customer-focused destination identity for each sub-region.

### What we WON'T do

- Bespoke marketing strategies for operators.
- Support one operator over others in the region.
- Unreasonably favour one LGA over others.

Function | DEMAND-SIDE



### WEST COAST VISION FOR 2025

To be recognised as Tasmania’s wilderness adventure-tourism hub, with experiences ranging from soft to hard adventure experiences delivered by a professional and passionate local tourism industry.

### DESTINATION MANAGEMENT | FOCUS FOR 2023

- With market demand having seemingly returned to the West Coast, our strategic focus must shift to supply-side functions including workforce development and increased cohesion across local industry.
- With new MTB trails, a new adventure tourism prospectus and continued development of the next iconic walk, there will be a renewed focus on product development - supporting growth of existing product/events and facilitating the new.
- An initiative to explore the potential of heritage tourism on the west coast can add a compelling layer of storytelling to the region’s adventure tourism offering.

### WEST COAST | DESTINATION NARRATIVE

You know Tasmania. You know quiet walks and rolling fields. You know art and wine and scenic drives. But you don’t know this place. You don’t know what exists beyond the range of mobile signal, where the weather changes minute to minute. Where paths have to be made instead of followed. Where the trees have endured for 10 thousand years. You don’t know the Tasmania that demands you exist on the terms of the land. But you will know it soon. You’ll encounter the raw, the untamed and the untouched. You’ll come face-to-face with the powerfully, eternally, undeniably wild. And once convenience and excess have been stripped away, you’ll discover true nature... and *your* true nature.

All it takes is a short trip outside your comfort zone.



Jess Bonde | Mount Farrell, West Coast



## NORTH WEST VISION FOR 2025

To be Australia's preeminent agritourism destination, embracing, celebrating and sharing our rich agriculture and iconic wilderness; as a truly unified region of passionate tourism professionals.

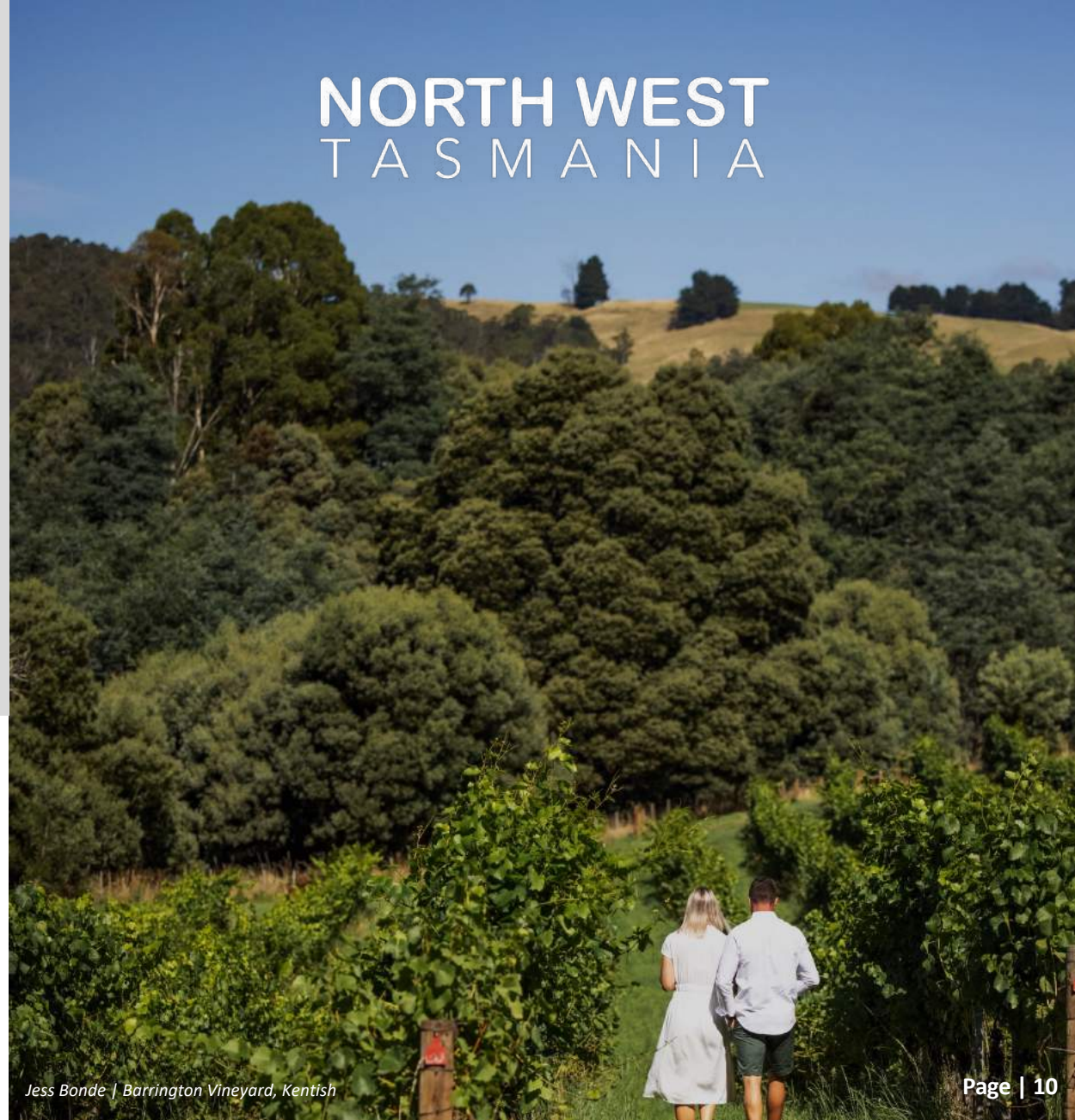
## DESTINATION MANAGEMENT | FOCUS FOR 2023

- Much new product has emerged in the north west over the past 24 months, from small boutique accommodation, a large 187-room hotel, a range of agritourism experiences and some new events. With this increased supply and the apparent return of visitor demand, we must now focus sharply on growing market awareness.
- Despite the abovementioned new product, we still have work to do this year in our *Product Development* pillar, particularly with relation to major projects including Dismal Swamp, Cradle Mountain and Don River Railway.
- The return of cruise presents an opportunity for our region's tourism and hospitality industry to maximise repeat visitation from this transient (but valuable) market.
- We have much work to do preparing our industry for the the arrival of new Spirit of Tasmania ferries in 2024, with an additional 40% capacity for visitor vehicles.

## NORTH WEST | DESTINATION NARRATIVE

We are Tasmania's most successful farmers, industrialists, entrepreneurs, and artists... but we're not big on bragging. Why? Because it's easy to create a beautiful dish with ingredients like this: world-heritage wilderness on one side, empty pristine beaches on the other, and Australia's richest agricultural soil spread between, creating a trail of fresh and unforgettable tastes. And to top it off, we have the cleanest air in the world. Yep, the world! Not bragging, just saying. Just grab the car and drive. Explore! And don't worry about shutting the gate... we know you'll be back.

# NORTH WEST TASMANIA





### KING ISLAND VISION FOR 2025

To be a bucket-list destination for those seeking indulgent escapes from the modern world and for golfers seeking the *holy grail* – all delivered as a well coordinated on-island visitor experience.

### DESTINATION MANAGEMENT | FOCUS FOR 2023

- Evidenced by 2022's travel voucher experiment and the resulting market insights, King Island is highly appealing to a premium market of travellers seeking unique experiences, with cost of access and accommodation availability as their primary hurdles. Therefore, we must be targeted in demand-generation, focussing more on sales conversion with target customers, than broader market awareness campaigns.
- There is work required in capacity building for the King Island airport to ensure its able to welcome the right aircraft, from the right destinations at the right frequency.
- There is some 'low hanging fruit' in developing a more cohesive on-island visitor experience, particularly using maps, apps and storytelling.

### KING ISLAND | DESTINATION NARRATIVE

King Island is a long table dinner with food, art, conversation and character unlike anywhere else. Why so different? Because we have to be. More creative, more honest, more challenging, more cooperative, more delicious and more fun. Our golf courses and boutique lodges, steak and triple brie, art centre and museum can't just be good – we have to make them extraordinary. Together.

Life here is just a little bit more... life. A wave from the steering wheel to every approaching vehicle is mandatory; car keys always stay in the car; the hotel concierge and the airport baggage handler are the same person; and we do have traffic lights... but only on a Wednesdays.

# KING ISLAND



In pursuit of our 2025 future state (vision), we will measure our performance annually to monitor progress. For this year's strategy, we will review KPIs at year-end October 2023.

### ADVOCACY / LEADERSHIP

**Vision for 2025:** Our communities understand and appreciate the value of tourism – sharing the best parts of living in the region with our visitors through stories, experiences and great service.

**KPI for 2023:** ≥10 positive tourism projects/outcomes through government advocacy by YE Oct 23.

### INDUSTRY SUPPORT

**Vision for 2025:** Our industry is engaged and cohesive, positively contributing to our regional community and focused on delivering quality experiences aligned to the region's strengths.

**KPI for 2023:** Industry satisfaction score of ≥70% by YE Oct 23 (WxNW Industry Survey).

### PRODUCT DEVELOPMENT

**Vision for 2025:** With many new and exciting tourism offerings, our region is no longer seen as 'a long way from Hobart', but instead a destination that must be visited to experience the best of Tasmania.

**KPI for 2023:** ≥5 new tourism products launched in the region by YE Oct 23.

### MARKETING

**Vision for 2025:** Our region's destination marketing is collaborative (focusing more on the visitor journey than municipal boundaries) and powerfully aligned with Tourism Tasmania's work to leverage the state's significant investment in destination marketing.

**KPI for 2023:** Net increase in visitor nights for our region by YE Jun 23 (TVS + NVS data).  
*In Oct 23, the most recent data will be from YE Jun 23.*

"However beautiful the strategy, you should occasionally look at the results." *Sir Winston Churchill*



PILLAR	VISION	26 x PRIORITY ACTIONS 22/23	T21 ALIGNMENT	KPI (YE Oct 22)	NOTES	
			This section of the table will be populated once the 2030 version of the T21 Strategy is released.			
ADVOCACY / LEADERSHIP	Our communities understand and appreciate the value of tourism – sharing the best parts of living in the region with our visitors through stories, experiences and service.	Skills and Training		This section of the table will be populated once the 2030 version of the T21 Strategy is released.	≥10 positive tourism projects/outcomes through government advocacy.	This pillar is unique, in that advocacy and leadership are required across all other pillars. For example, we will advocate for government support of Don River Railway, for the interests of Tasting Trail members and for strong representation of the West Coast in marketing campaigns.
		Climate Change				
		Inclusive Tourism				
		Visitor Engagement Model				
		Visitor Access				
		King Island Airport				
		Major Projects				
INDUSTRY SUPPORT	Our industry is engaged and cohesive, growing with the opportunities before it and focused on delivering quality experiences aligned to the region’s strengths.	Industry Events			Industry satisfaction score of ≥70% (WxNW Industry Survey).	The nature of this pillar is somewhat reactive, insofar as we will offer industry support however we can, as required. However, these priority projects provide a framework to pursue our KPI.
		Regional Tourism Data				
		Aboriginal Tourism				
		Cruise				
		Council Strategies				
		Agritourism				
		New Spirit Ferries				
PRODUCT DEVELOPMENT	With many new exciting tourist offerings, our region is no longer seen as ‘a long way from Hobart’, but instead a destination that must be visited to experience the best of Tasmania.	Dismal Swamp			≥5 new tourism products launched in the region.	Although this should not be viewed as an exhaustive list of product development projects we will support, they will be our strategic priorities for 2023.
		Don River Railway				
		WC Adventure Tourism				
		King Island Visitor Engagement				
		Tasting Trail				
		Permission to Trespass				
		WC Heritage Tourism				
MARKETING	Our region’s approach to destination marketing is powerfully aligned, with digital platforms (websites, social media, etc.) speaking the same language, sharing consistent information and focused more on the visitor journey than local/municipal boundaries.	Content Generation	Net increase in visitor nights for our region (TVS + NVS Report).	It’s important to remember, this particular pillar is primarily built around our partnership with Tourism Tasmania, as the state’s destination marketing agency with resources to be effective in market (RTOs are very small organisations).		
		ATDW Drive				
		Tasting Trail				
		Destination Websites				
		Social Media				

Most actions within this strategy will require collaboration with other bodies in the Tasmanian visitor economy network.





**Tom Wootton**

Chief Executive Officer

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