

east coast
tasmania



REGIONAL STRATEGIC PLAN

2022 - 2024



ACKNOWLEDGEMENT

The Tasmanian tourism industry acknowledges the Tasmanian Aboriginal people and their enduring custodianship of Iutruwita / Tasmania.

We honour 40,000 years of uninterrupted care, protection and belonging to these islands, before the invasion and colonisation of European settlement.

As a tourism industry that welcomes visitors to these lands, we acknowledge our responsibility to represent to our visitors Tasmania's deep and complex history, fully, respectfully and truthfully.

We acknowledge the Aboriginal people who continue to care for this country today. We pay our respects to their elders, past and present. We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands. We respectfully ask that tourism be a part of that future.

TABLE OF CONTENTS

OUR PURPOSE AND VISION	1
OUR ROLE IN TOURISM	2
REGIONAL STRATEGIC PLAN	3
Current State	4
Goals	7
Pathway	8
Future State	10
SUMMARY	11

** This is a dynamic document to be reviewed quarterly.*

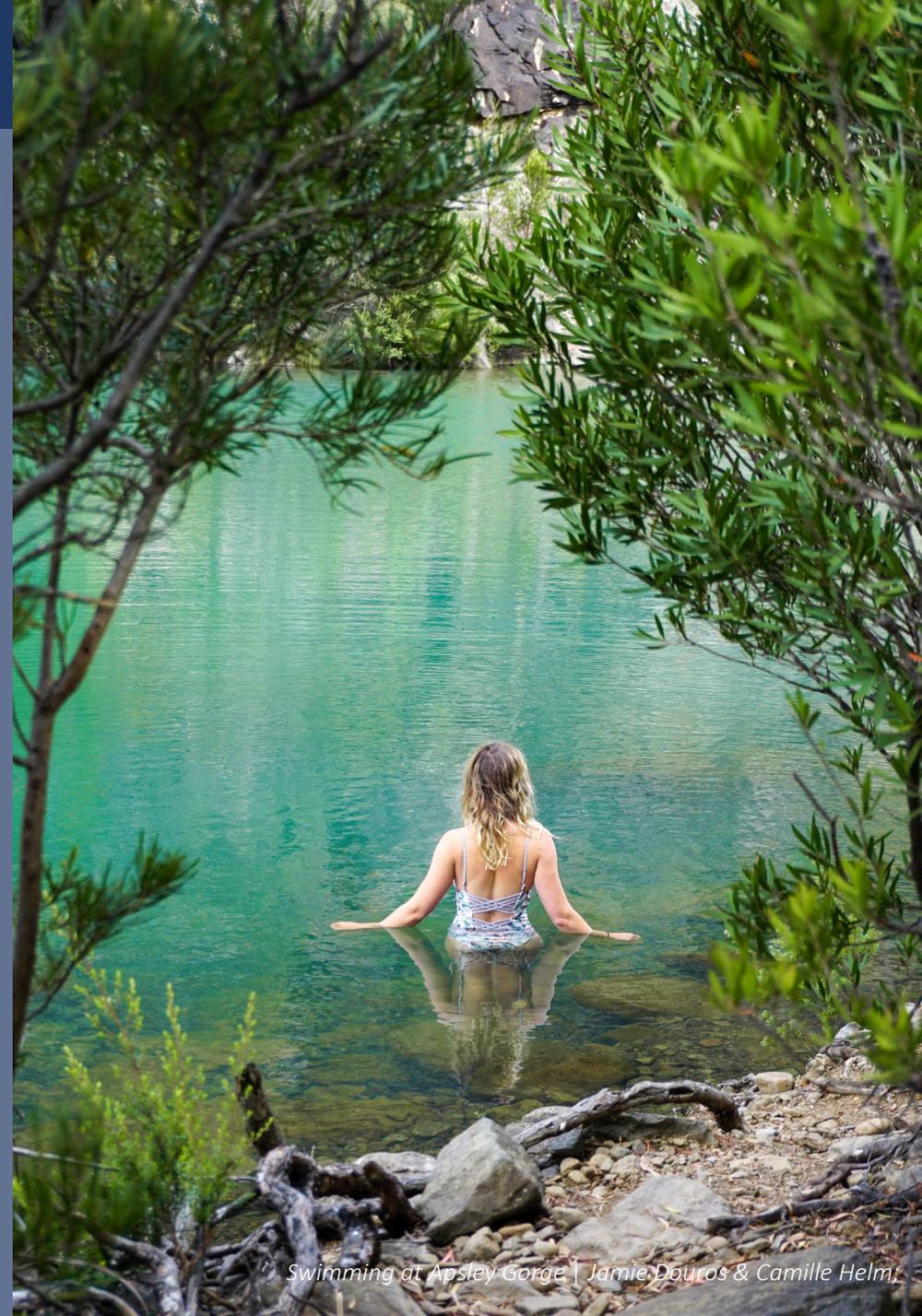


Our Purpose

We are advocates for East Coast tourism, ensuring that visitors to our region enjoy an excellent experience. We work with partners to promote our destination and support our industry by providing operators with the tools and services they need to succeed. We are custodians of a brand which our community values and we engage with our community to ensure our industry is sustainable.

Our Vision

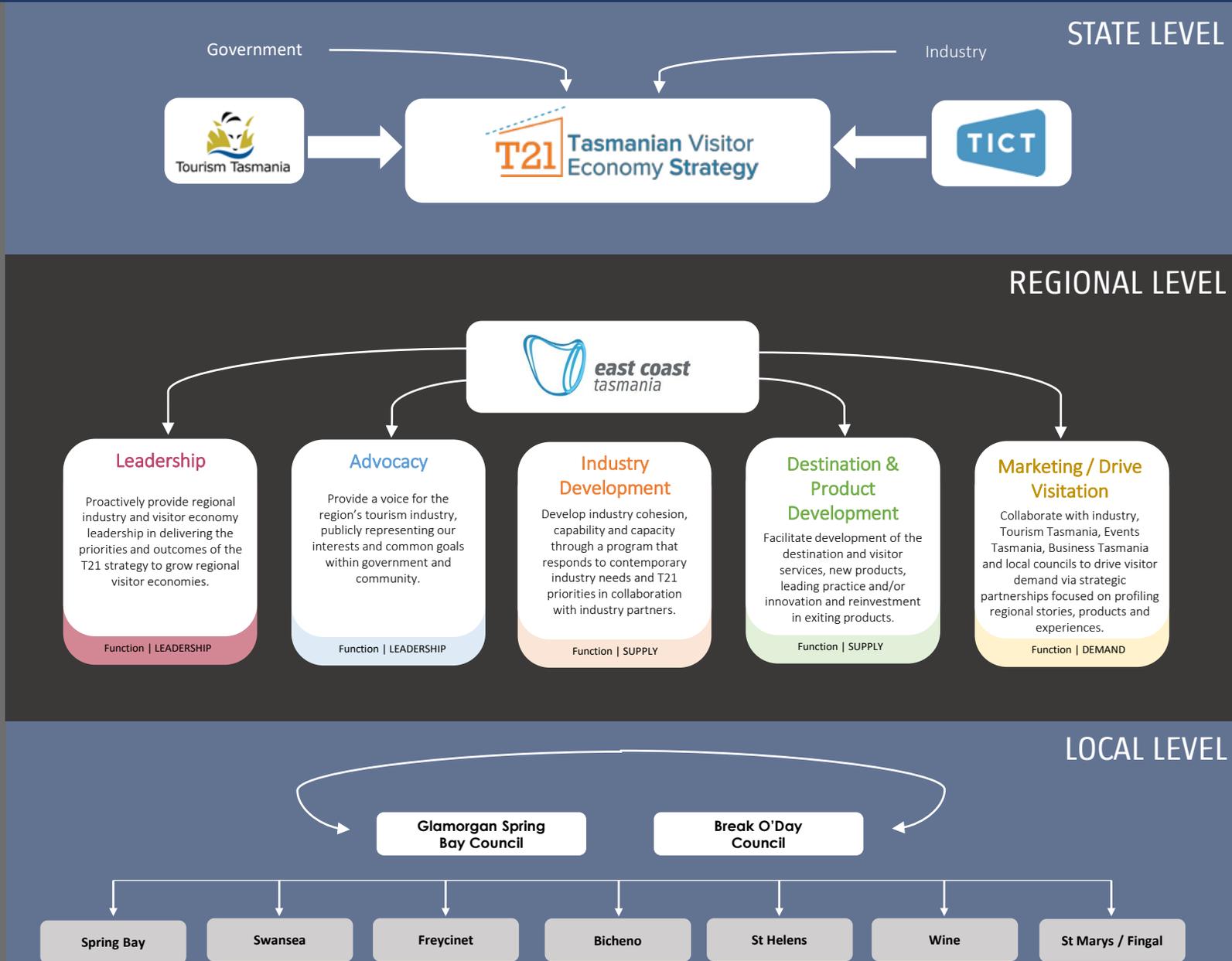
Tasmania's East Coast will be the premier destination in a great tourism state. Our region will enjoy the highest levels of digital and business connection and take innovative approaches to the challenge of housing the workforce of the future. Our communities will value our tourism industry and the role we play in supporting its success. Our organisation will have a clear role in the Tasmanian tourism ecosystem, with sustainable funding and a reputation for understanding our industry and having a big impact on the ground. We will be Tasmania's best regional tourism organisation, supporting tourism businesses that are happier, healthier and celebrated.



Swimming at Apsley Gorge | Jamie Douros & Camille Helm

OUR ROLE IN TOURISM

- Everything we do feeds into the **T21 Visitor Economy Strategy**, which exists as part of the T21 partnership between industry and government (represented by Tourism Tasmania and TICT).
- The T21 partnership spans beyond these two partners to create a central framework for Tasmania's **visitor economy network** including State Growth, Parks + Wildlife, Regional Tourism Organisations, Brand Tasmania, Events Tasmania, Office of the Coordinator General and more.
- ECTT is one of four **regional tourism organisations (RTOs)**, each funded by the Tasmanian government to work with both government and industry at regional level.
- At ECTT, our work is viewed **through 5 x strategic pillars**, that shape our day-to-day operations and regional objectives.
- RTOs are only small organisations, but work closely with other teams across the region including:
 - **Local Government:** visitor information centres, local events, infrastructure, signage, marketing, etc.
 - **Local Destination Action Plan (DAP) Groups**
 - **Local Business Chambers and Community Groups**
- 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.



Tasmania's East Coast will be the premier destination in a great tourism state.

Current State

Profile of our region's tourism industry

Goals

What we want for our industry

Pathway

Actions to help us get there

Future State

Measuring success



East Coast Rankings

- East Coast **ranked first overall** in the comparative importance of tourism across Tasmania's regions
- The tourism industry contributed an estimated \$197.6 million to the regional economy (previously \$151.8 million)
- East Coast ranked fourth in overall industry size; supplying 7% (was 6%) of the state-wide direct contribution to tourism GRP (\$124.2 million) (was \$95.3 million)

Tasmanian Visitor Survey (TVS)

- East Coast region welcomed an estimated **201,100 interstate and international visitors** to the region in the 12 months to September 2021

Note that due to COVID-19 impacts and border closures, the TVS operated for 11 months of the year ending September period (Nov 2020 – September 2021)

- Comparison to year ending December 2019 (pre-COVID): 357,400 interstate and international visitors to East Coast region

Importantly the TVS excludes Tasmanians from any estimates

Tasmanian Visitation (Intrastate)

- **341,000 overnight trips** were taken by Tasmanians to the East Coast region in the year ending September 2021
- These Tasmanians stayed a **total 890,000 nights** in the region on these trips



CURRENT STATE – SWOT ANALYSIS

STRENGTHS

Beautiful landscape, serenity, friendly communities and genuine people
The most favourable climate with the least rainfall in Tasmania
Exceptional nature-based and cultural experiences with the potential to develop even more
Well recognised Great Eastern Drive providing an exceptional journey
Fishing, diving, marine and land-based wildlife viewing / interaction
St Helens MTB assets and events
Seasonal produce (nuts, olives, grapes, seafood, beef, lamb, honey)
Thriving and developing wine making and distilling industries
Series of exceptional bush walks, many in national park and world heritage areas
Active creative arts and music community
Community commitment to sustainability and regenerative tourism
Clear skies and fresh air
ECTT is working collectively with other RTOs representing the regions of Tasmania

WEAKNESSES

Access – road condition for cars and cycling (Tasman Highway, Weilangta Road)
Sustainable work force – affordable housing, child care
Town services capacity – greywater, sewage, potable water, litter management
Public transport
Direct air access to the East Coast
Digital infrastructure and connectivity
Visitor economy opening hours
Stopping points, short experiences on Great Eastern Drive journey
Lack of full community support for tourism
Insufficient public amenities for visitors
Misconception about East Coast as a day and short stay destination
Digital strength of Industry
There is a shortage of affordable housing for purchase, long term and short term rentals

This SWOT analysis is intended to cover the primary factors for the East Coast region. It may not cover every single strength, weakness, opportunity and threat across the region, but creates a clear picture to determine a suitable path to take forward. Source: *2021 – 2025 East Coast Tasmania Destination Management Plan*.

OPPORTUNITIES

- Accessibility to the main cities and ease of driving between towns and attractions
 - Strong base to further develop Aboriginal experiences and stories
 - Climate suited to year-round visitor experiences
 - Broader accommodation diversity – eco lodges, camping, affordable
- A significant coastal trail that links the national parks and hinterland experiences
 - Year-round visitation and brand aligned events
- Growing creative experiences – art, local music and vibrant cultural scene
 - Contemporary and current visitor information
 - Leveraging off city experiences
 - Expand agritourism opportunities and more cellar doors
 - Dark skies - events and activities
 - Build strong digital development program for the industry
 - Grow transport opportunities and authentic guided experiences
- To build a unique brand offering which will have a strong digital focus
 - ECTT can work with community to build a sustainable tourism model
 - Work with local government to build tourism and hospitality
 - Target a strategy for becoming a carbon positive region
- Work with the shared economy as a positive contributor to the tourism sector

THREATS

- Competition from other destinations close to source markets
- Continued workforce decline including workforce is ageing, and this has implications for the East Coast economy generally (e.g. in terms of workforce availability).
- Lack of collaboration, leadership and investment
- Climate change induced events such as increased wild fires
- Ongoing shortage of affordable staff housing
- Ongoing funding relevant to the goals for RTO
- Our economy is tightening and the impact on discretionary spending.
- There are significant, ongoing supply chain constraints impacting on new construction
- Digital and connectivity is not addressed
- It's not clear how future attitudes to the 'sharing economy' will evolve, particularly noting the perceived impact of AirBnB on housing availability and affordability. The attitude toward the industry and community attitude to the shared economy

GOALS - OUR DIRECTION

Our goals as outlined in the 2021 – 2025 East Coast Tasmania Destination Management Plan:

- Establish new and strengthen existing **relationships**, and instigate collaboration with local **government**, state agencies, community groups and businesses.
- Engage deeply and frequently with **tourism operators** and provide second-to-none support through training, communication and the provision of opportunities for connection and mentoring.
- Create a fresh brand and undertake **marketing strategies** across all platforms to position the East Coast as the premier destination in a great tourism state.
- Develop the **diversity and quality of experiences** and information available to visitors by facilitating industry experience development and investment, particularly for Aboriginal cultural experiences, to guide innovative opportunities that embrace positive impact tourism, and do so alongside our government partners.
- Work to encourage **investment** and **attract sustainable**, eco-friendly and high-end developments and experiences; ensuring the visitor footprint is minimal.
- Build a compelling case to **live, work** and **invest** on the East Coast.

T21 Visitor Economy Strategy

The T21 Visitor Economy Strategy identifies a list of state-level goals under its Covid Recovery Action Plan, many of which ECTT and the other RTOs are responsible for supporting.

These goals are categorised against four T21 priorities, which align perfectly with our own regional goals.

T21 Top 4 Priorities

1. Rebuilding Visitation

Through these regional goals, we will rebuild visitation to surpass pre-covid levels.

2. Supporting our People

Through our pillars of Industry Support and Product Development, we will facilitate the growth and advancement of people and businesses within our region's industry.

3. Restoring Access

Although access is more directly affected at state-level, we will prepare for the return of cruise tourism and the new TT-Line ferries.

NB. While the East Coast will see some cruise business, our region is not an access point.

4. Shaping our Future

Pursuing opportunities including carbon neutrality, indigenous and inclusive tourism and enhanced adventure and agritourism offerings.

PATHWAY - STRATEGIC PILLARS (The Pursuit of Regional Dispersal)

The grant deed through which Tourism Tasmania provides funding to RTOs stipulates the following expectations. Our 5 x strategic pillars have potential to produce a very broad range of tactical activity. Therefore, we must be clear about **what we may do**; and **what we won't do** to ensure our strategic objectives remain clear and achievable.

Leadership

Proactively provide regional industry and visitor economy leadership in delivering the priorities and outcomes of the T21 strategy to grow regional visitor economies.

What we may do:

- Work collaboratively with the tourism network
- Host regular Industry / Community virtual forums
- Communicate through our Industry Newsletter and Facebook Industry Group

What we won't do:

- Not intervene in Council matters
- Not stray from our core responsibilities

Function | LEADERSHIP

Advocacy

Provide a voice for the region's tourism industry, publicly representing our interests and common goals within government and community.

What we may do:

- Reflect regional sentiment on state level projects
- Seek action on access issues
- Seek + facilitate training + education assistance
- Liaise with TICT to lobby on region's behalf
- Emergency response communications
- Represent industry via media + community events
- Provide letters of support, where appropriate

What we won't do:

- Government lobbying (this is the role of TICT)
- Support one operator over others in the region
- Unreasonably favour one municipality over others
- Provide letters of support to all who ask
- Public comment on matters unrelated to tourism

Function | LEADERSHIP

Industry Development

Mentor East Coast operators to ensure they are digitally literate and savvy. The industry operations and their workforce are skilled & capable to deliver on the vision carried out in partnership with TICT and government agencies.

What we may do:

- Industry consultation (T21 strategy, journeys)
- Industry updates between State + Local level, to improve industry dynamics + govt relations.
- Personal site visits with tourism operators, to assist, advise, educate, connect, etc.
- Activity relating to charity + social awareness.
- Host events for education, discussion, social/networking, etc.

What we won't do:

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

Function | SUPPLY

Destination & Product Development

World class product year round. Established and continued investment in a visitor product. Indirect tourism business are recognised and included as part of the visitor experience. Visitor information is easily found for all demographics and aligned with the brand.

What we may do:

- Identification of new product opportunities for the region (indigenous, agritourism, luxury, etc.)
- Advice + facilitation for new product development
- Facilitate projects for development of upgrade of public infrastructure (signage, tracks, etc.)
- Pursue realization of a product's potential (Food & Wine Trail, Festivals, etc.)
- Enhancement of environmental/social credentials

What we won't do:

- Invest, fund or offer any financial support to new or existing products.

Function | SUPPLY

Marketing / Drive Visitation

Increase awareness of our unique experiences and events available on the East Coast all year around. Ensure the brand of the East Coast is protected and effectively marketed and plays a critical role in developing and deploying marketing strategy at local, regional and state level.

What we may do:

- Content creation (image, video, written)
- Content + strategic partnership with TTAs
- Assist development of Drive Journeys project
- Media + visiting journalists/influencers
- Cooperative marketing projects (multi-operator)
- Support + facilitate the delivery of cultural events

What we won't do:

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

Function | DEMAND

PATHWAY - STRATEGIC PRIORITIES

Our Strategic Priorities as outlined in the 2021 – 2025 East Coast Tasmania Destination Management Plan (DMP):

STRATEGIC PRIORITY 1

Encourage social, environmental, cultural and economic wellbeing through the visitor economy.

STRATEGIC PRIORITY 2

Strengthen the East Coast appeal as a destination.

STRATEGIC PRIORITY 3

Embrace and pursue effective partnerships and collaboration.

STRATEGIC PRIORITY 4

Invest in experience development to deepen the visitor offering.

STRATEGIC PRIORITY 5

Explore opportunities for, and barriers to, investment in positive impact tourism infrastructure.

STRATEGIC PRIORITY 6

Industry Development for business capacity and capability building to create innovative industry partnerships.



Chelsea Rogers | Camping at Wineglass Bay

FUTURE STATE – OUR KPIs

Our KPI's as nominated by the ECTT board as are follows:

KPI #1

The ECTT RTO is appropriately managed and governed in line with ASIC requirements, represented at key state industry forums and highly visible within the industry network on the East Coast.

KPI #2

Businesses on the East Coast aligned with the visitor economy will be supported to be effectively run and viable, through collaboration, advice and training.

KPI #3

Support industry to develop new and optimise existing visitor experience products that meet visitor expectations and align to the DMP and T21/Recovery plans.

KPI #4

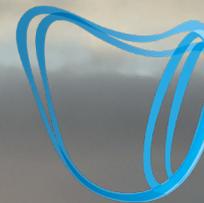
Marketing activities will be equitable across the region, aligned with the statewide offer but tailored to the unique proposition of the East Coast with the view to increase the contact with consumers for increased regional dispersal and spend by visitors.



Wombat on Maria Island | Prime Perspectives

SUMMARY – STRATEGY ON A PAGE

PILLAR	GOAL	STRATEGIC PRIORITIES	KPI [nominated by the Board]
LEADERSHIP	Establish new and strengthen existing relationships , and instigate collaboration with local government , state agencies, community groups and businesses.	Encourage social, environmental, cultural and economic wellbeing through the visitor economy	The ECTT RTO is appropriately managed and governed in line with ASIC requirements, represented at key state industry forums and highly visible within the industry network on the East Coast.
		Embrace and pursue effective partnerships and collaboration	
		Infrastructure investment. CATALYST PROJECT: Great Eastern Drive journey and Coastal Path	
		Invest in experience development to deepen the visitor offering aligned to positioning and pillars	
		Infrastructure Development	
ADVOCACY	Establish new and strengthen existing relationships , and instigate collaboration with local government , state agencies, community groups and businesses.	Encourage social, environmental, cultural and economic wellbeing through the visitor economy	The ECTT RTO is appropriately managed and governed in line with ASIC requirements, represented at key state industry forums and highly visible within the industry network on the East Coast.
		Embrace and pursue effective partnerships and collaboration	
		Infrastructure investment CATALYST PROJECT: Great Eastern Drive journey and Coastal Path	
		Invest in experience development to deepen the visitor offering aligned to positioning and pillars	
		Infrastructure Development	
INDUSTRY DEVELOPMENT	Engage deeply and frequently with tourism operators and provide second-to-none support through training, communication and the provision of opportunities for connection and mentoring.	Embrace and pursue effective partnerships and collaboration	Businesses on the East Coast aligned with the visitor economy will be supported to be effectively run and viable, through collaboration, advice and training.
		Invest in experience development to deepen the visitor offering aligned to positioning and pillars	
		Infrastructure Development	
DESTINATION & PRODUCT DEVELOPMENT	Develop the diversity and quality of experiences and information available to visitors by facilitating industry experience development and investment. Work to encourage investment and attract sustainable , eco-friendly and high-end developments and experiences; ensuring the visitor footprint is minimal. Build a compelling case to live, work and invest on the East Coast.	Embrace and pursue effective partnerships and collaboration	Support industry to develop new and optimise existing visitor experience products that meet visitor expectations and align to the DMP and T21/Recovery plans.
		Invest in experience development to deepen the visitor offering aligned to positioning and pillars	
		Infrastructure investment CATALYST PROJECT: Great Eastern Drive journey and Coastal Path	
MARKETING / DRIVE VISITATION	Create a fresh brand and undertake a marketing mission across all platforms to position the East Coast as the number one nature-based adventure destination for a global audience.	Strengthen the East Coast appeal as a destination - a year-round place to play, the uncrowded coastline and nature and culture abound	Marketing activities will be equitable across the region, aligned with the statewide offer but tailored to the unique proposition of the East Coast with the view to increase the contact with consumers for increased regional dispersal and spend by visitors.
		Embrace and pursue effective partnerships and collaboration	



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