

# East Coast Tasmania DESTINATION MANAGEMENT PLAN

2022 - 2025





## DISCLAIMER

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## ACKNOWLEDGMENT

The Tasmanian tourism industry acknowledges the Tasmanian Aboriginal people and their enduring custodianship of lutruwita / Tasmania. We honour 40,000 years of uninterrupted care, protection and belonging to these islands, before the invasion and colonisation of European settlement. As a tourism industry that welcomes visitors to these lands, we acknowledge our responsibility to represent to our visitors Tasmania's deep and complex history, fully, respectfully and truthfully. We acknowledge the Aboriginal people who continue to care for this country today. We pay our respects to their elders, past and present. We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands. We respectfully ask that tourism be a part of that future.

## PHOTO CREDITS

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# EXECUTIVE SUMMARY

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# EXECUTIVE SUMMARY

## TASMANIA

Tasmania is a place where the uncommon is common. Where you can throw off the shackles and feel everything deeply. It is the antidote to the straitjacket of modern life. Tasmania is no ordinary place and Tasmanians are no ordinary people. It is a place that finds joy in non-conformity and our visitors can discover soul-enriching experiences that are raw, beautiful and honest. Come Down for Air is an invitation to get air in both a literal and metaphorical sense. It is about harnessing the power of place and our people and creating a moment of calm for travellers.

## 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.

## GOALS

- 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

## GUIDING PRINCIPLES

The Guiding Principles are intended to provide a guide to decision-making across both supply and demand initiatives. This includes for governance, product and experience development, marketing and the design and delivery of events, among other things.

The guiding principles, which are all equally important, are:

### CORE SUSTAINABILITY

Social, Environmental, cultural and economic wellbeing

### POSITIVE IMPACT AND SUSTAINABLE GROWTH

Where growth in tourism leads to positive outcomes across the sustainability pillars

### UNITING AND ENRICHING COMMUNITIES

Our regions are linked through journeys, experiences, stories and information

### INSTILLING PRIDE IN THE COMMUNITY

We are proud to show what we have and how we live

### SURPRISING AND MAGICAL, DISCOVERY, HIDDEN GEMS

A journey across our regions can be serendipitous and quirky

### EMBRACING GUESTS

Our hospitality is second to none in welcoming visitors

### INNOVATIVE

We are brave and will try to create new experiences and services

### AUTHENTIC EXPERIENCES

All visitor interactions with Tasmania are real and interactive



# EAST COAST EXPERIENCE PILLARS

## PILLAR 1

### A YEAR ROUND PLACE TO STAY

... adventure, creative experiences, food, drink and events

## PILLAR 2

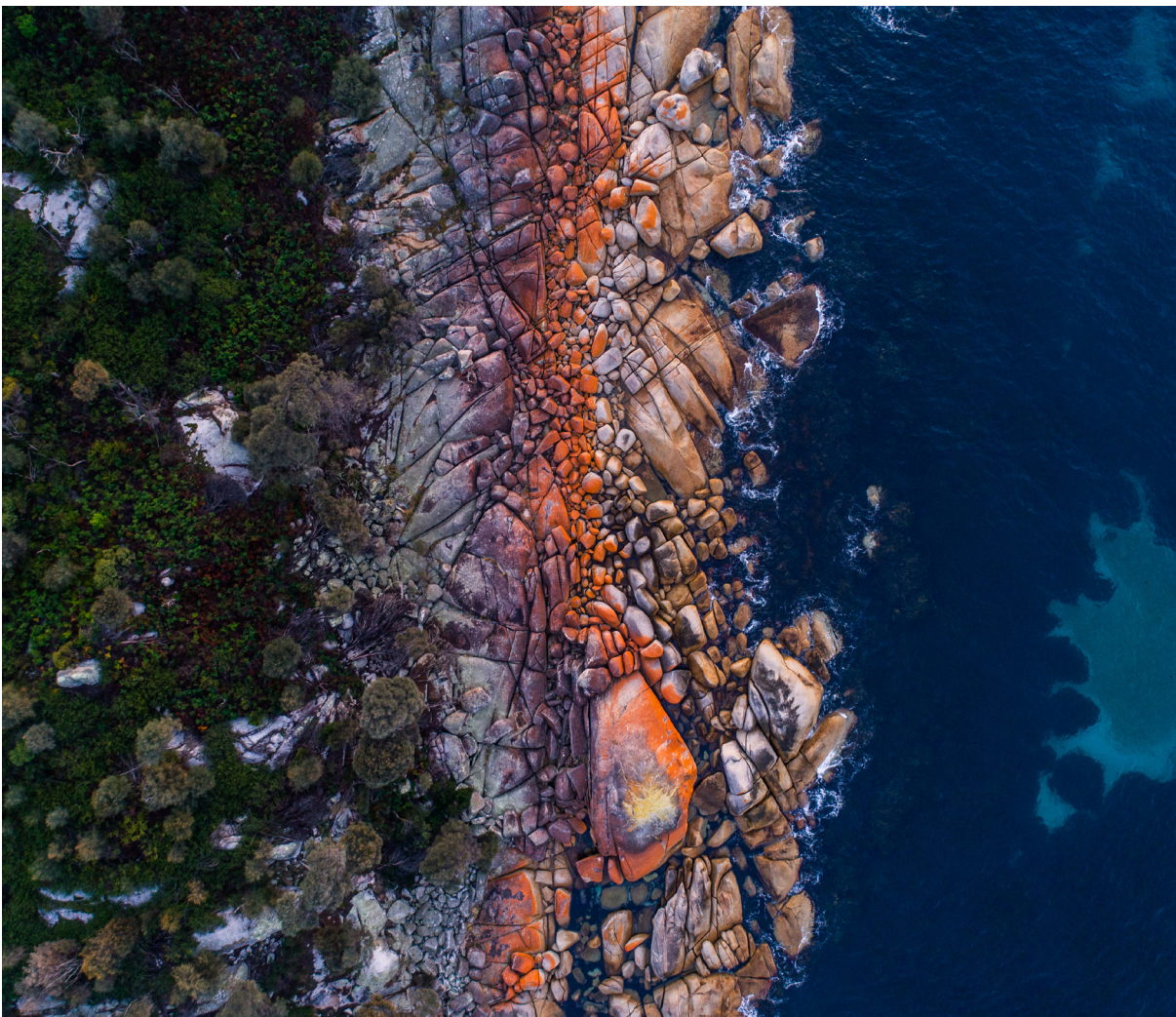
### THE UNCROWDED COASTLINE

... a drive where you will want to take your time, walk the quiet beaches, taste fresh food and drink and meet the locals

## PILLAR 3

### NATURE AND CULTURE ABOUND

... in our national parks, our Aboriginal and post settlement heritage where the coast meets the forest





# STRATEGIC PRIORITIES

## 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 all year round.

## 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





# INTRODUCTION

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# INTRODUCTION

The Tasmanian Government, Local Government Agencies (LGAs), tourism industry and the four Regional Tourism Organisations (RTOs) are united in the development of regional Destination Management Plans (DMPs) for 2021-2025.

The Tourism 21 Visitor Economy Action Plan 2020-2022 (T21) is the overarching statewide document developed in collaboration with the Tourism Industry Council of Tasmania (TICT), setting the goals and priorities for tourism in Tasmania as a pathway to tourism recovery for the state.

## KEY GOALS OF T21

- Restore the value of visitor spending in Tasmania to \$2.5 billion by the end of 2022
- Grow the value of tourism to regions by increasing visitor spend
- Generate more jobs for Tasmanians

Aligned to T21, the DMPs will equally inform the future vision and strategy for the visitor economy of Tasmania as well as determine strategic priorities for each region and direct the collective investment in regional tourism to maximise desired outcomes.

T21 was informed by pandemic impacts, previous Destination Management Plans, Destination Action Plans as well as aspirations from the initial consultation with stakeholders to inform a future Tourism 2030 strategy. The DMPs will respond to these aspirations that are to:

- Grow visitation to Tasmania that is economically, environmentally and socially sustainable
- Grow yield and sustainable visitation numbers
- Grow visitation in Tasmania by Tasmanians including awareness of product on offer
- Putting our regional towns and destinations at the heart of the visitor experience
- Support Tasmanian Aboriginal people in the sharing of their culture and history
- Illustrate responsible stewardship for our protected areas
- Tell the Tasmanian story and celebrate who we are
- Support the evolution of profitable and sustainable businesses
- Foster diversity and the next generation of industry leaders



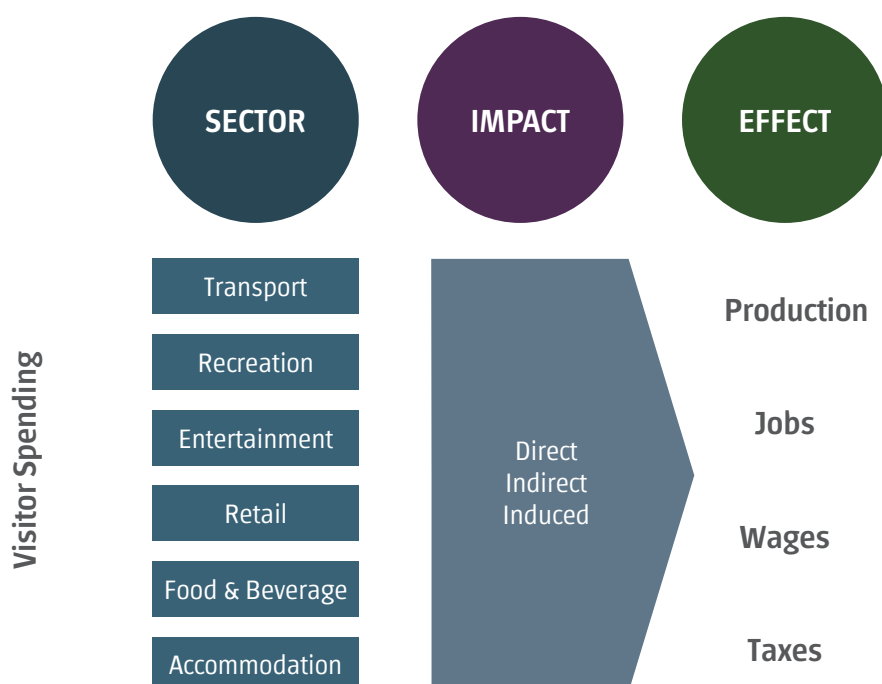


The Tasmanian hospitality sector is currently facing a number of significant opportunities and challenges, to which a joined-up and connected industry response is required. The Industry Development Plans prepared by the Tasmanian Hospitality Association (THA) present a holistic and strategic vision to guide this response. They contain a range of possible programs and initiatives to support and shape the industry into the future and relevant elements of these are captured in the DMPs.

COVID-19 travel restrictions and border closures have seen significant impacts to Tasmanian visitation, the tourism industry and the broader Tasmanian economy.

- For the year ending March 2021, overall visitor numbers dropped by 75%
- Compared with year end March 2020, expenditure had dropped by 68% to \$813 million (previously \$2.5 billion) <sup>1</sup>
- Summer 2021 (January-March) in Tasmania saw some positive growth, with visitor nights up by 2.2 nights in March 2021 (from 2019) and a noticeable swing to a preference for self-contained and luxury accommodation
- Domestic visitors spent 29% more in the state in March 2021 compared to March 2019. Average spend per visitor was therefore also up at around 48% higher spend per visitor than March 2019 <sup>2</sup>

The four 2021-2025 Destination Management Plans will provide direction for growth in the visitor economy. The visitor economy is about more than just the tourism sector. It relates to any spend by visitors in the state including those here for business, education or visiting family and friends. It relates to expenditure on tourism, but also on transport, agriculture, retail, entertainment, car repairs, groceries etc. Any spend within the state has direct and indirect impacts resulting in jobs, wages, taxes, investment and more.





# WHERE ARE WE NOW

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# WHERE ARE WE NOW?

The traditional land and seas of the Palawa Aboriginal people, East Coast Tasmania covers over 6,000 square kilometres of land. From the unique larapuna/Bay of Fires in the north, along 220 km of stunning coastline past Freycinet National Park to Triabunna and the iconic Maria Island in the south. Seaside towns are framed by rugged mountains, interspersed with rich agricultural areas producing a gourmet food bowl. The East Coast Wine Trail is complemented by local artisan offerings and ocean fresh 'catch of the day'. The region is also home to a rich cultural, mining and farming heritage, with remnants of days past evidenced in the small towns and remembered through a range of tour products, attractions and experiences.

The region falls across two Local Government Areas (LGAs):

- The Break O'Day Council in the north – 6,346 residents
- Glamorgan Spring Bay Council in the south – 4,440 residents <sup>3</sup>

Tourism is a significant contributor to the region, with the food and beverage sectors, including cafes and restaurants, as the top employer for both LGAs providing approx. 24% of all jobs. This is followed by air, water and other transport at 16% and then accommodation at 12%.

Whilst its market share has seen improvement and contributes \$175 million in visitor spend, the East Coast has traditionally welcomed less visitors than other regions in the state – around 28% of all visitors to Tasmania and 9% of overall visitor nights (2019). The majority of visitors (80%) travel to the region for holiday / leisure purposes. Bushwalking, visiting national parks and historic sites are the most popular activities.

Of all the Tasmanian regions, the East Coast is the most reliant on its hospitality sector, which represents a substantial share of the local labour force and business. The region has seen a shift where many visitors choose the 'share economy' rather than hotel/motel accommodation and this has meant a reduction in investment in the region from larger organisations and skill shortages. To address these challenges, there is a need to develop new hospitality related education, training and recruitment programs, encourage investment in longer-term rentals and support initiatives which ensure longer stays in the region.

Summer 2021 saw some East Coast destinations record similar occupancy rates as the same time in 2019 with some operators reporting that the accommodation demand had actually surpassed any previous years. Overall, the East Coast was the highest performing Tasmanian destination in 2021 with predominantly intrastate visitors, many of whom were capitalising on the incentivised travel voucher scheme. Growth in interstate visitation was also seen from states and territories permitted to travel to Tasmania.

Rather than broad transformation in the industry, continual improvements combined with effective marketing of the year-round offering will deliver good results for the East Coast region. Substantial investment in infrastructure including roads, connectivity services and sewerage and water supply for towns is required in order to see any significant level of growth and increased visitor expenditure in the region.



# CURRENT ATTRACTIONS AND ACTIVITIES

## NATURE TOURISM



The East Coast has some of Tasmania's most beautiful national parks including Freycinet and Bay of Fires as well as several lesser known and equally as beautiful national parks. Maria Island is also a well-known natural asset. Funding has been committed for improvements to both Freycinet and Maria Island. The Bay of Fires region has formed a steering committee which will deliver a Master Plan for the area.

## HERITAGE AND CULTURE



The Darlington Probation Station located in the Maria Island National Park is recognised by UNESCO as one of only five world heritage sites in Tasmania. Across the entire East Coast, significant gathering and eating locations for Aboriginal people can be discovered and there are rich indigenous stories to be told, with many of these already being interpreted through the Wukalina Walk and Freycinet Aboriginal storytelling projects.

## CREATIVE INDUSTRIES



The region has an emerging arts and creative industries sector and the potential for growth in this area is significant. The developing live music culture can also be better integrated into the visitor economy on the East Coast.

## ADVENTURE



Opportunities for adventure are strong throughout the region. Mountain biking assets, including the construction of the Epic Trail north of St Helens (one of only two in Australia), a range of short and multi-day walks, plus diving, surfing and fishing set the East Coast of Tasmania to be the ultimate destination for the adventure travel market, and the potential for further development of experiences in the region is immense.



# CURRENT ATTRACTIONS AND ACTIVITIES

## REGIONAL PRODUCE



The East Coast is home to an array of artisans and craftspeople of all kinds. Well known for its wine, crayfish, abalone, oysters, mussels, walnuts and mushrooms, new agritourism ventures are also emerging which will see an increase in micro distilling and paddock to plate experiences for visitors.

## EVENTS



The East Coast hosts several events associated with food, wine, music and adventure. On the back of recent very successful and high-profile mountain bike events, culinary festivals and music concerts, the East Coast will continue to grow these event offerings for visitors to the region.

## DRIVE JOURNEY



The established Great Eastern Drive journey has initiated growth in the wine sector/cellar door operations and activated some of the smaller, less known villages of the coast and hinterland. Journeys from the midlands to the East Coast are less well known and offer beautiful scenery, hence this is a feature for future development.

## ACCOMMODATION



East Coast Tasmania features accommodation ranging from predominantly small to mid-sized motels, some boutique guest houses, Airbnb / share economy properties and a number of high-end luxury properties. Camping is available, both paid and free, in national parks, conservation areas and most towns.

# THE NEXT FOUR YEARS: KEY DRIVERS, ENABLERS AND INFLUENCERS

## ECONOMIC AND SOCIAL DISRUPTION



The global pandemic has resulted in disruption to economics, politics, and our everyday life and will catalyse a new generation of tourism. A recovering global economy has implications for domestic travel with less discretionary expenditure on purchases like leisure travel and a softening of international visitor growth to Tasmania. Intrastate travel has increased with travellers visiting friends and relatives and taking short breaks being particularly strong. Short breaks and longer self-drive holidays also remain active with interstate markets.

## INCREASING COMPETITION FOR DOMESTIC TOURISM



International visitor numbers will stay low until at least 2022, perhaps even longer, and this is a major shift away from typical visitor trends. Domestic tourism demand however will continue to grow and this will see a dramatic increase in competition between Australian regional destinations for a share of these domestic markets. Tasmania will need to offer experiences so desirable that travellers are compelled to choose Tasmania before other destinations.

## GENERATIONAL SHIFTS



As the 'Baby Boomer' market enters retirement, 'Generations X and Y' will populate the family and workforce markets. 'Generation Z' is entering the workforce and will bring with them an entirely new set of values and preferences to those who came before. Social connection and conscious consumerism will generate greater demand for sustainable practices, and carbon positive products and experiences. These new markets will be seeking meaningful and purposeful experiences where accessibility and equality is paramount. The tourism sector will need to consistently demonstrate a commitment to sustainability and authenticity.

## ENVIRONMENTAL SUSTAINABILITY



As global warming continues to overwhelm the world, there is an imperative to encourage residents to be more mindful of the environment and make planet-friendly lifestyle choices. Around the world this expectation is also extending to the tourism sector. Travellers are also making conscious decisions about responsible travel.





## SOCIAL LICENCE FOR TOURISM



How residents feel about tourism is also becoming increasingly important and will determine a destination's success in the long term. Community sentiment is guiding tourism planning and development, and there is a growing expectation that tourism will generate positive social, environmental and economic benefits for the host communities.

## EXPERIENTIAL AND LOCAL



Travellers are seeking immersive experiences anchored in local culture which has seen creative cultural elements featuring more strongly in tourism products and experiences than ever before. This can be seen in promotions such as the 'live like a local' campaign for Copenhagen, one of the world's most culturally creative destinations which has particular relevance to the Tasmanian tourism environment.





# STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS (EAST COAST)

## 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

## 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



# STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS (EAST COAST)

## OPPORTUNITIES

- Accessibility to the main cities and ease of driving between towns and attractions
- Strong base to further develop Aboriginal experiences and stories (Wukalina Walk and Freycinet story telling project)
- Climate suited to year-round visitor experiences
- Broader accommodation diversity – eco lodges, camping
- A significant coastal multi-purpose trail that links the national parks
- 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 (e.g. Dark Mofo, Launceston Gastronomic city etc.)
- 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 resonate with local communities and visitors
- Target a strategy for becoming a carbon positive region

## THREATS

- Competition from other destinations close to source markets
- Loss of market share
- Continued workforce decline including ageing workforce
- Lack of collaboration, leadership and investment
- Climate change induced events such as increased wild fires
- Ongoing shortage of affordable staff housing
- Our economy is tightening and the impact on discretionary spending.
- There are significant, ongoing supply chain constraints impacting on new construction



# HOW DO WE GET THERE

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# OUR VISION AND GOALS

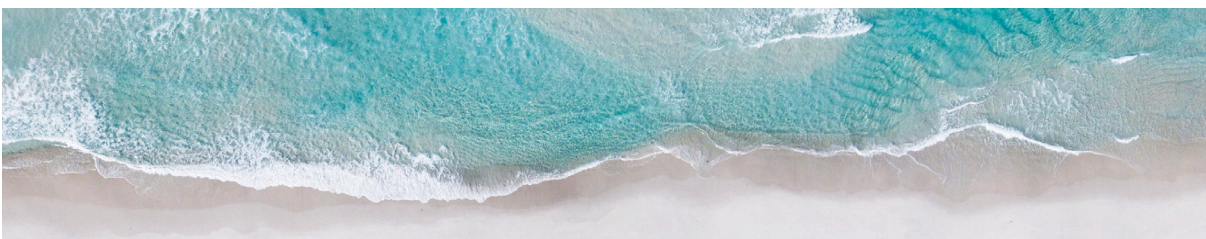
*The anchor attraction for the East Coast is the compelling visitor journey which links the exceptional natural environments of Freycinet, Maria Island and the Bay of Fires. The Great Eastern Drive Journey will be enhanced and supported by the development of bike and walking trails following the coastline, the indigenous history of the region and accessibility to all experiences, for our residents and visitors.*

## 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.

## GOALS

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- 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





# OUR POSITIONING AND HERO EXPERIENCES

The East Coast is currently best known for the natural beauty of Freycinet and, to a lesser extent, Maria Island and Bay of Fires and the beauty and simplicity of the Great Eastern Drive journey including the seafood sector and emerging wine trail and drink experiences.

Consultation through the DMP process concurred that the East Coast positioning could be strengthened to reflect:



Better promotion of the temperate year-round weather and the East Coast as the outdoor all-seasons destination for Tasmania with experiences that enable visitors to embrace the sea, the forest, the dark sky and the produce year-round.



Leading Tasmania in becoming a carbon neutral and responsible tourism destination including targets such as becoming a 'plastics free' destination



Improving the infrastructure and experiences of the Great Eastern Drive journey to encourage people to slow down and make a journey of it.



Strengthening awareness of the exceptional national parks that are the gems of the East Coast.



Greater recognition and improved interpretation of the rich Aboriginal history and stories of the East Coast, as a core part of the visitor experience.



Promoting the experiences of small communities, living like a local and encouraging the community to be ambassadors for the region.

The opportunity now is to bring these untapped features to life through on-ground experience, which will enable visitors to meet local people, engage with the natural assets of the East Coast and hear the stories steeped in history that connect the two.

*“For sustainable growth, destinations will need a collaborative 7-point plan.... that comprises a compelling anchor attraction, a supporting ecosystem of activities, seamless physical and digital access, options for high-end accommodation, strong promotion, a strong social licence to operate and dedicated management of resilience and sustainability risks. Activities may be selected from the growing trends for authentic, adventure, cultural, indigenous, luxury, digital and eco-tourism experiences.”<sup>4</sup>*



# EAST COAST EXPERIENCE PILLARS OVERVIEW

The following three experience pillars were developed through the consultation process.



## PILLAR 1

A YEAR-ROUND PLACE  
TO PLAY

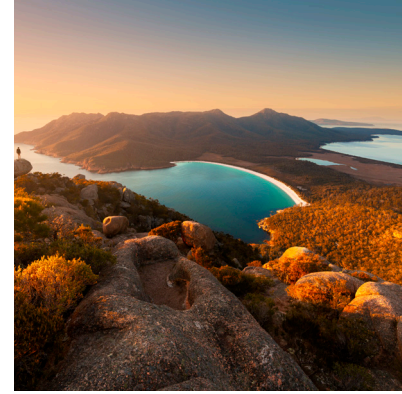
... adventure, creative experiences, food, drink and events



## PILLAR 2

THE UNCROWDED  
COASTLINE

...a drive where you will want to take your time, walk the quiet beaches, taste fresh food and drink and meet the locals



## PILLAR 3

NATURE AND CULTURE  
ABOUND

...in our national parks, our Aboriginal and post settlement heritage where the coast meets the forest

Each pillar is intended to enable the realisation of the East Coast vision and positioning and subsequently meet and hopefully exceed community and stakeholder aspirations. While these pillars focus upon the strengths of the destination, they also provide a foundation of intent to ensure that there is a diverse offering of experiences in the region that will appeal to new and existing target markets

### OUR HERO AND SUPPORTING EXPERIENCES

Hero experiences are exceptional experiences (whether existing or aspirational) that:

- Provide a destination with a real competitive advantage over other destinations
- Focus on what is truly unique, memorable or engaging about a destination
- Meet the needs of the identified target markets

Support experiences are those experiences that are important across the region, either to strengthen the overall visitor experience or for the local community.

# PILLAR 1 - A YEAR ROUND PLACE TO STAY

## ... ADVENTURE, CREATIVE EXPERIENCES, FOOD, DRINK AND EVENTS



### HERO EXPERIENCES

- St Helens Mountain Biking - Continue to strengthen and refresh the trail offering at St Helens to leverage all north-east Tasmanian MTB markets and encourage length of stay
- Winter events - Pursue new winter events such as a satellite event from Dark Mofo that celebrates the climate of the East Coast, additional winter wine and food events (potentially linked to Launceston Gastronomic experiences) and a new dark sky/ astronomy event

### SUPPORT EXPERIENCES

- Year-round marine activities - wildlife / whale viewing, diving, fishing and surfing
- Rejuvenating in the winter sun – relaxation, wellness, open fires and beachside accommodation
- Strengthen the range of creative experiences in towns and villages including arts, music and cooking schools
- Packaged experiences linking to other regions (e.g. MTB St Helens - Derby; golf at Barnbougle etc)
- Promoted clusters of iconic experiences (e.g. Tasman Peninsula, Port Arthur, Maria Island, Freycinet, Cradle Mountain)





# PILLAR 2 - THE UNCROWDED COASTLINE

... A DRIVE WHERE YOU WILL WANT TO TAKE YOUR TIME, WALK THE QUIET BEACHES, TASTE FRESH FOOD AND DRINK AND MEET THE LOCALS



## HERO EXPERIENCES

- Great Eastern Drive Journey (GED) - Strengthen the attraction through road improvements including lookout and stopping points and continued growth and promotion of the cellar doors, seafood and agritourism experiences
- A coastal trail - Investigate the feasibility of a coastal shared trail that links the national parks and towns of the East Coast to enable people to walk or cycle the entire coast safely
- Accommodation - Seek investment in new eco and experiential accommodation, including new spa and wellness experiences

## SUPPORT EXPERIENCES

- Develop linking experiences into Port Arthur and further north to Launceston making it one of the world's great drive journeys (once Wielangta Road is sealed)
- Formalise the infrastructure (car parks, signs, toilets etc) that allows travellers and locals to park, walk and explore the hidden beaches and rockpools
- Continue to encourage development of boutique produce to be sold by the makers at cellar doors and farm gates bringing the drive to life
- Encourage towns and villages to welcome visitors through small events, creative industries and local ambassadors
- Develop a culture of sustainability – begin with removing single use plastics and disposable coffee cups and invest in electric vehicle charging stations



# PILLAR 3 - NATURE & CULTURE AROUND

... IN OUR NATIONAL PARKS, OUR ABORIGINAL AND POST SETTLEMENT HERITAGE WHERE THE COAST MEETS THE FOREST



## HERO EXPERIENCES

- Freycinet National Park Master Plan - world class facilities and experiences at Freycinet including ongoing development of Aboriginal story-telling
- Maria Island Management Plan - visitor experiences of the Darlington World Heritage Area, nature-based experiences on the island and unique accommodation offering
- Bay of Fires Master Plan - currently being scoped for delivery by end of 2023/2024
- Tasmania's Great East Coast Walks - Promotion of the four exceptional walking opportunities (Bay of Fires, Wukalina, Freycinet and Maria Island) as a way to experience the varying environments and stories of the East Coast

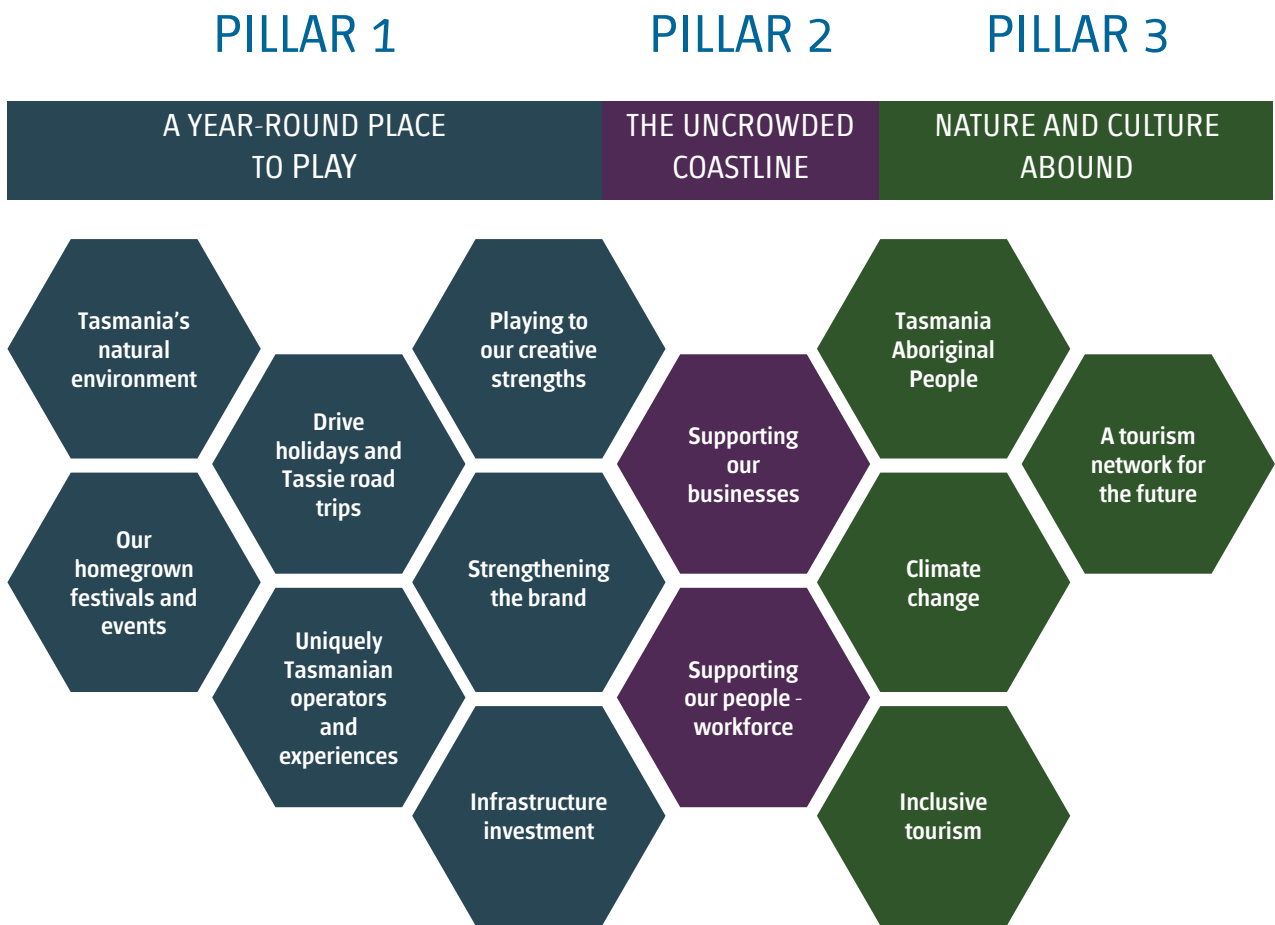
## SUPPORT EXPERIENCES

- Maintenance of park infrastructure that supports visitors and protects the values of the parks
- Diversity and profile of short walks and visitor facilities across all parks in the region to take pressure off the larger parks, for example, short walks in Douglas Apsley National Park
- Encourage development of commercial small group day experiences from local towns
- Promote camping as a way to experience the region (National and commercial parks)
- Continue to promote opportunities to experience the villages of the region including their town walks



# DELIVERING ON T21

Our strategic priorities deliver on the T21 priorities. Consistent with the diagram below, each of the East Coast Experience Pillars and Strategic Priorities has an icon that identifies which T21 priority it relates to.





# STRATEGIC PRIORITIES

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# STRATEGIC PRIORITY 1

ENCOURAGE SOCIAL, ENVIRONMENTAL, CULTURAL AND ECONOMIC WELL-BEING THROUGH THE VISITOR ECONOMY, ACHIEVED THROUGH:

- Establishing the East Coast as the destination of choice for responsible travellers where the community and visitors alike can make a difference
- Opportunities that enable the local communities to benefit from the visitor economy socially, economically and culturally
- Opportunities for visitors to engage with the local people through real and authentic engagement
- Educating locals and visitors to the region on how to engage and interact with the environment with as little impact as possible
- Activating the rich cultural stories to breathe life into the histories and landscapes of the region
- Regenerative and sustainable growth; tourism that gives back to communities and the environment

## PRIORITY STRATEGIES

1.1 State to agree on a target and strategy for delivering a carbon positive region with short term initiatives for use of paper bags, no single use plastics, and installation of electric vehicle chargers in towns

1.2 Engage the community in tourism planning and capacity building through inclusion in regional famils to better understand the visitor economy and inviting input into new initiatives

1.3 Provide strong advocacy for the accreditation programmes available to tourism operators

1.4 Encourage tourism operators to incorporate a purpose brand element into their business to allow for regeneration programmes that will provide mutual benefit to the operator and the broader community





## STRATEGIC PRIORITY 2

STRENGTHEN THE EAST COAST APPEAL AS A DESTINATION ALL YEAR ROUND THROUGH:

- Further development of positioning through a brand review
- Working to deliver on the three experience pillars
- Coordinated marketing across the region
- Encouraging Tasmanians to see the exceptional experiences on offer

### PRIORITY STRATEGIES

2.1 Refine the regional brand and adopt a singular focused approach to implementation

2.2 Encourage industry commitment to the brand and the experience pillars

2.3 Strengthen awareness as year round destination

2.4 Digital transformation to build on-ground visitor information services

2.5 Develop higher profiles for hero and support experiences within the experience pillars

2.6 Promote hero experiences including mountain biking and cycling, walking and hiking, water activities, food, drink and events





# STRATEGIC PRIORITY 3

## EMBRACE AND PURSUE EFFECTIVE PARTNERSHIPS AND COLLABORATION INCLUDING:

- Instilling pride through celebrating and sharing local Aboriginal culture
- Encouraging local talent, people and associations to work together to create locally operated family and community owned businesses
- Local governments working to facilitate new investment opportunities
- Effective visitor servicing
- Industry cooperation and cross promotion
- Strategic collaboration and planning between RTOs

### PRIORITY STRATEGIES

3.1 Leverage the Freycinet Aboriginal story telling project to broaden awareness of the region's cultural stories

3.2 Determine optimal approach to the region's visitor servicing

3.3 Encourage local communities to be ambassadors for the experiences on offer in the region

3.4 RTOs to collaborate and share knowledge and experiences



# STRATEGIC PRIORITY 4

## INVEST IN EXPERIENCE DEVELOPMENT TO DEEPEN THE VISITOR OFFERING THROUGH:

- Authentic experiences aligned to positioning and experience pillars
- Creating the right environment and confidence for businesses to invest in new and existing services, experiences and visitor infrastructure
- Ensuring consistent quality and availability of tourism experiences (and supporting infrastructure)
- Packaging products / services / experiences in such a way as to add value for visitors and extend their stay in the region
- Creating awareness of the experiences on offer at the booking stage

### PRIORITY STRATEGIES

4.1 Investment in new and improved experiences that deliver on brand and experience pillars

4.2 Aboriginal Tourism

4.3 Regional Produce

4.4 Grow commissionable experiences that deliver on the experience pillars and positioning

4.5 Ensure public spaces and amenities in local towns and villages are community and visitor friendly

4.6 Develop a strong events program that builds on the appeal for the region and to grow visitation all year round



# STRATEGIC PRIORITY 4

INVEST IN EXPERIENCE DEVELOPMENT TO DEEPEN THE VISITOR OFFERING THROUGH:





# STRATEGIC PRIORITY 5

EXPLORE OPPORTUNITIES FOR, AND BARRIERS TO, INVESTMENT IN POSITIVE IMPACT TOURISM INFRASTRUCTURE TO ENSURE:

- Natural assets are protected and enhanced for visitation
- Appropriate diversity of accommodation
- Roads are fit for purpose
- Adequate services to underpin growth
- Digital connectivity for community and visitors
- Housing availability to attract long term staff

## PRIORITY STRATEGIES

5.1 The East Coast Master Plan

5.2 Ongoing support and development of experience pillars

5.3 Ensure public spaces and amenities in local towns and villages are community and visitor friendly General services infrastructure

5.4 Affordable staff housing for key visitor locations

5.5 Seek investment in priority projects (Catalyst Project - Great Eastern Drive Journey and Coastal Path)

5.6 Digital connectivity and mobile coverage





# STRATEGIC PRIORITY 6

## INDUSTRY DEVELOPMENT FOR BUSINESS CAPACITY AND CAPABILITY BUILDING TO CREATE INNOVATIVE INDUSTRY PARTNERSHIPS

- Building digital and business capabilities
- Capacity building to create innovative industry partnerships
- Industry partnerships that enable better sales, servicing of guests and cross promotion of products
- Working with other RTOs and state government to resolve state-wide challenges for the sector
- Tourism, agriculture, seafood and wine sectors working to create additional visitor economy opportunities

### PRIORITY STRATEGIES

6.1 Encourage Tourism businesses to develop their capability and digital presence

6.2 Provision of support through resources and grant opportunities



# OUR ENABLERS

Enablers are critical areas of performance that underpin the strategic priorities and actions. They are essential for delivering the plan and achieving the vision.

## CUSTOMER SERVICE

Support exemplars in the region and help all businesses see their opportunities for improvement through family and industry led workshops,

## WORKFORCE GROWTH AND DEVELOPMENT

Work with state government on critical initiatives to underpin tourism industry workforce recruitment and retention (short and long term),

## INDUSTRY COHESION

Continue to collaborate strongly with local and state government and other regions to ensure the Tasmanian brand and vision are delivered.

## COMMUNITY SUPPORT

Implement initiatives that will increase community awareness and support for the visitor economy and better integrate the industry with community.

## SUSTAINABLE FUNDING

Continue to advocate for strong funding and partnerships to ensure ongoing effective destination development and marketing.



# STATE-WIDE INITIATIVES AND INDUSTRY PARTNERSHIPS

There are a range of initiatives that are critical to underpinning growth across all regions, including:

- Delivering on the Tasmanian Brand as a whole industry to ensure the overall industry grows and benefits
- Ensuring a culture of sustainability and responsible tourism across the state through initiatives including:
  - Having the conversations within industry about what it means to be sustainable
  - Investing in certification (more for the outcome than the logo)
- Continuing to grow accessible tourism services
- Implementing and supporting the implementation of many of the Premier's Economic and Social Recovery Advisory Council (PESRAC) recommendations that affect the tourism sector including the Jobs Tasmania Local Network, digital connectivity, community leadership, and environment and sustainability
- Addressing labour force issues both short (as a result of COVID) and long term to underpin growth and diversification in the sector including:
  - Affordable accommodation shortages
  - Sustainable career options
- Support TICT Industry certification scheme (as an existing scheme) and encouraging awareness of other appropriate certification to improve overall standard

There is also a range of opportunities that can be delivered as partnerships across all or some RTOs. The suggested approach is identified in the table below:



## OPPORTUNITIES

Implementation of industry sector wide plans such as the Tasmanian Hospitality Industry Development Plans

Business development – streamlining, improvement, engagement and coordination of government services to improve access to business support for new and growing businesses in the sector

Visitor servicing – including digital initiatives such as portals, AR interpretation opportunities, grant programs for business development, active engagement of Tas VIC network with RTOs

Tourism ambassador program as component of visitor servicing

Recognition as leaders in sustainable and positive impact tourism

Sustainability, Destination Certification (Ecotourism Australia), carbon neutral

Strong demand for Aboriginal tourism offerings among Australian and international visitors

Stronger activation of agritourism, night time and off season economy

Convict heritage aligned to the serial World Heritage sites across Tasmania

Fulfill the promise – encourage operators to collaborate in ensuring the needs of visitors are met in terms of opening hours and basic services

Workforce shortages (short and long term) and in some locations, key affordable worker housing

Training and capacity building

Accessible tourism opportunities

National Park experiences



## APPROACH TO ADDRESSING

RTOs to lead the discussions with TTAS, THA, TICT and other partners on the implementation of programs within industry on the East Coast

RTOs to advocate within State Government and industry bodies for a one stop shop case management system for potential new entrants

RTOs to conduct audits of their regions and develop appropriate training plans

Invest in implementation of the Tasmanian Visitor Engagement Blueprint

East Coast to lead in strategy towards delivering a carbon positive Tasmania that also becomes recognised as an eco-destination

Active support for business development and partnerships with Aboriginal people

Celebrate the heritage of Tasmania aligned to the outstanding convict heritage buildings remaining

Encourage cooperation and rostering in each regional town so that each local community has something on offer for visitors after hours or weekends

Continue to partner with State Growth and the Office of the Coordinator General regarding developing alternative housing models for work force participants

Support TICT workforce development models and implement training plans aligned to priority strategic directions in this DMP and T21.

Partner with LGAs and the State Government to ensure, where possible, all new design and infrastructure meets accessibility requirements

Addressing the visitor experience at high volume sites in popular national parks through initiatives such as bookings and limits on numbers

Seeking sensitive investment in appropriate experiences in national parks

Continue to push ATDW to ensure effective promotion through multiple website channels

# MEASURING OUR SUCCESS

- Improvement on results of 2020 Product and Experience audit
- Increase of tourism contribution to GDP
- Increased per visitor spend
- Increased per visitor length of stay
- Increase in repeat visitation
- Increase in seasonal visitation
- Improved community sentiments on tourism
- Increased participation by local Aboriginal people in tourism
- Demonstrated improved brand recognition and marketing KPIs (likes, searches, click throughs) as a desired destination
- Progress towards carbon neutrality and Sustainable Destination status (Ecotourism Australia)

## RISKS

- Inappropriate / inadequately resourced governance
- Leadership and cohesion of the industry
- Sustainable funding source
- Maintenance – ensuring the right infrastructure is maintained to the right standard
- Workforce – the right skills and the right number of people
- Social licence – having the community support behind the industry vision and goals
- Lack of resources, including investment in the environment and culture supporting the Experience Pillars and industry



**STRATEGIC  
HIGH-LEVEL  
IMPLEMENTATION  
PLAN**

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# STRATEGIC HIGH-LEVEL IMPLEMENTATION PLAN

Implementation of The Plan will occur in partnership with a broad range of government agencies and organisations. The following Action Plan sets out a high-level implementation plan reflecting lead and support organisations for delivery of each action identified, alongside high-level indicative time frames.

The following plan is intended to guide consideration of priority projects and actions. Commitment and delivery is subject to available resources and partner agreement:

## EAST COAST PARTNERS

- Break O'Day Employment Connect (BODEC)
- Businesses in the visitor economy
- Business Chambers
- Business Enterprise Centre (BEC)
- DAP groups
- East Coast Wine Trail Association (ECWTA)
- Event organisers
- Land managers
- Local community
- South East Region Development Association (SERDA)

## INDUSTRY PARTNERS

- Aboriginal groups
- Business Events Tasmania (BET)
- Royal Automobile Club of Tasmania (RACT)
- Spirit of Tasmania
- Tasmanian Chamber of Commerce and Industry (TCCI)
- Tourism Australia (TA)
- Tourism industry - State
- Visitor Experience Training (VXT)
- Wine Tasmania (WT)

## STRATEGIC PARTNERS

- Brand Tasmania (BT)
- Break O'Day Council (BODC)
- Department of State Growth (DSG)
- Events Tasmania (ET)
- Glamorgan-Spring Bay Council (GSBC)
- Office of the Coordinator General (OCG)
- Other RTOs
- Parks and Wildlife Service (PWS)
- Skills Tasmania (ST)
- Tasmanian Hospitality Association (THA)
- Tourism Industry Council Tasmania (TICT)
- Tourism Tasmania (TTAS)



# STRATEGIC PRIORITY 1

## ENCOURAGE SOCIAL, ENVIRONMENTAL, CULTURAL AND ECONOMIC WELLBEING THROUGH THE VISITOR ECONOMY

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
1.1 State to agree on a target and strategy for delivering a carbon positive region with short term initiatives for use of paper bags, no single use plastics, and installation of electric vehicle chargers in towns	1.a State to develop statewide strategy	Medium / ongoing	T21	ECTT, BODC, GSBC
	1.b Working group of ECTT and two LGAs to develop a local strategy with a community committee to assist with community engagement and development of working groups	Medium / ongoing	BODC, GSBC	ECTT, East Coast Partners
1.2 Engage the community in tourism planning and capacity building to better understand and have input into new initiatives	1.c Encourage communities to come together for civic events and activities which appeals to both locals and visitors	Medium	BODC, GSBC	Local community, Business Chambers
	1.d Encourage communities with an interest in offering a visitor experience to have an event or activity that celebrates who they are and their place in the region	Medium	DAP groups, Chambers	East Coast Partners
	1.e Encourage famils within the industry	Short / ongoing	Business Chambers, DAP groups	Local community, Businesses in the visitor economy, BODC, GSBC
1.3 Provide strong advocacy for the accreditation programmes available to tourism operators	1.f Encourage businesses across the visitor economy to become eco certified with a goal for the region to become an eco certified destination	Medium	ECTT	Businesses in the visitor economy, DAP groups, Business Chambers, TICT, TCCI, BODC, GSBC
1.4 Encourage tourism operators to incorporate a purpose brand element (such as contribution to Aboriginal programs, re-vegetation etc) into their business to allow for regeneration programmes that will provide mutual benefit to the operator and the broader community	1.g Provide industry awareness and case studies of successful purpose brand programs elsewhere	Medium	ECTT	Businesses in the visitor economy, BODC, GSBC

*Short term is next 12 months; medium term within 3 years; long term beyond 3 years.*

# STRATEGIC PRIORITY 2

## STRENGTHEN THE EAST COAST APPEAL AS A DESTINATION

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
2.1 Refine the regional brand and adopt a singular focused approach to implementation	2.a Engage Brand Tasmania to further develop the positioning of the region based on the core strengths identified through this DMP	Medium	ECTT	BT, BODC, GSBC
2.2 Encourage industry commitment to the brand and the experience pillars	2.b Implement an industry development program to create awareness and support use of the refreshed regional brand and experience pillars	Medium	ECTT	East Coast Partners, BODC, GSBC
2.3 Strengthen awareness as year round destination	2.c Drive increased visitation in the low and shoulder seasons and encourage the development of all year round experiences and products	Short/ ongoing	ECTT	East Coast Partners, TTAS
2.4 Digital transformation to build on-ground visitor information services	2.d Use a digital portal/app and strategy for the state and the East Coast region to create and distribute content to build visitor knowledge and understanding of the destination	Short / Ongoing	ECTT, TTAS	East Coast Partners, BODC, GSBC, PWS
2.5 Develop higher profiles for hero and support experiences within the experience pillars	2.e Support campaigns specific to the experience pillars including the journeys campaign	Medium	TTAS	ECTT
2.6 Promote hero experiences including mountain biking and cycling, walking and hiking, water activities, food, drink and events	2.f Develop or support marketing campaigns relating to the hero experiences	Short / ongoing	ECTT, TTAS	East Coast Partners, Industry Partners, PWS

*Short term is next 12 months; medium term within 3 years; long term beyond 3 years.*



# STRATEGIC PRIORITY 3

## EMBRACE AND PURSUE EFFECTIVE PARTNERSHIPS AND COLLABORATION

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
3.1 Leverage the Freycinet Aboriginal story telling project to broaden awareness of the region's cultural stories	3.a Encourage Aboriginal people involved in the Freycinet project with PWS to support others in telling local stories	Medium / ongoing	PWS	ECTT, TTAS
3.2 Determine optimal approach to the region's visitor servicing	3.b Develop strategy around optimal visitor servicing for the state	Medium	DSG	TTAS, ECTT, BODC, GSBC
3.3 Encourage local communities to be ambassadors for the experiences on offer in the region	3.c To complement the TICT ambassador program, develop a well-planned, promoted and branded strategic programme of open days, famils and activities across the region where locals are encouraged to participate and achieve greater awareness of the needs of visitors and opportunities to enhance their visit	Short / ongoing	DAP Groups, Business Chambers	East Coast Partners, ECTT, BODC, GSBC
3.4 RTOs to collaborate and share knowledge and experiences	3.d RTOs to meet quarterly to share knowledge and regional updates	Short / ongoing	RTOs	

*Short term is next 12 months; medium term within 3 years; long term beyond 3 years.*

# STRATEGIC PRIORITY 4

## INVEST IN EXPERIENCE DEVELOPMENT TO DEEPEN THE VISITOR OFFERING ALIGNED TO POSITIONING AND PILLARS

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
4.1 Investment in new and improved experiences that deliver on brand and experience pillars	4.a Seek investment in the priority hero and experiences pillars	Medium	BODC, GSBC	ECTT, PWS, DSG, OCG
	4.b Identify sites, develop and undertake an EOI process for new tourism development opportunities sites (such as new accommodation) and distribute the documentation widely	Medium	BODC, GSBC	ECTT, East Coast Partner, OCG
4.2 Aboriginal Tourism	4.c Support for the development of Aboriginal tourism working alongside the Freycinet story telling project	Medium / ongoing	PWS	ECTT
4.3 Regional Produce	4.d Facilitate the wineries, food and beverage producers of the East Coast to link with other restaurateurs and producers, building the brand of high quality, sustainably sourced food / wine	Medium	ECTT	ECWTA, WT, Businesses in the visitor economy
	4.e Agritourism Project - Promote the provenance of local produce for its origins in a pristine environment	Short / ongoing	TTAS	ECTT, Businesses in the visitor economy
4.4 Grow commissionable experiences that deliver on the experience pillars and positioning	4.f Encourage a broader range of commercial operators delivering nature and adventure experiences in the region to become commissionable	Medium	ECTT	TTAS, East Coast Partners
4.5 Ensure public spaces and amenities in local towns and villages are community and visitor friendly	4.g Local Government Areas to consider the visitor economy in planning for town and villages including the night time economy	Medium	BODC, GSBC	ECTT, DSG
4.5 Develop a strong events program that builds on the appeal for the region and to grow visitation all year round	4.g Develop East Coast region event strategy promoting and developing new and existing events	Medium / ongoing	ECTT	BODC, GSBC, ET, Event organisers

*Short term is next 12 months; medium term within 3 years; long term beyond 3 years.*





# STRATEGIC PRIORITY 5

## EXPLORE OPPORTUNITIES FOR, AND BARRIERS TO, INVESTMENT IN TOURISM INFRASTRUCTURE

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
5.1 The East Coast Master Plan	5.a Working with State Growth and OCG to develop the East Coast Master Plan to do a desktop review of: <ul style="list-style-type: none"> <li>• Land zoning and development options</li> <li>• Data analysis of trends in visitor numbers</li> <li>• Audit of current supply vs project demand and gaps relating to segments of the visitor projections including accommodation</li> <li>• Interviews with key stakeholders to provide insight and options</li> <li>• Recommendation for property areas of investment</li> </ul>	Medium - Long	DSG, ECTT	All
5.2 Ongoing support and development of experience pillars	5.b Continue the implementation of the Freycinet Master Plan and Maria Island Management Plan	Long	PWS	All
	5.c Development for the scope of works for the Bay of Fires Master Plan	Long	BODC	ECTT, PWS, OCG, East Coast Partners, Aboriginal Groups
5.3 Ensure public spaces and amenities in local towns and villages are community and visitor friendly General services infrastructure	5.d Local Government to audit general services in their LGA and to consider the visitor economy in planning for town and villages	Medium	BODC, GSBC	ECTT, DSG
5.4 Affordable staff housing for key visitor locations	5.e Investigate options for investment in accommodation suited to staff all year round	Medium	DSG, OCG	ECTT, BODC, GSBC
5.5 Seek investment in priority projects (Catalyst Project - Great Eastern Drive Journey and Coastal Path)	5.f Develop an investment guide for the region - listing key projects, available support, incentives and economic indicators - that can be used as a tool for attracting potential investors	Medium	OCG	ECTT, BODC, GSBC
5.6 Digital connectivity and mobile coverage	5.g Lobby for investment in digital connectivity for community and visitors	Medium	ECTT	BODC, GSBC, DSG (Digital Futures)

# STRATEGIC PRIORITY 5 - CATALYST PROJECT

## GREAT EASTERN DRIVE JOURNEY AND COASTAL PATH

The popularity of the Great Eastern Drive journey (GED) has increased over time, but the potential for creating significant yield from this journey lies in deepening the experience offering to encourage people to see it as a journey where you need to commit to several days. The journey currently links some of Tasmania's most recognised natural landscapes (Freycinet, Bay of Fires) and the world heritage and natural landscape of Maria Island. For many, these are the icons to be visited. By further developing the experience offerings of the entire journey with greater diversity of product, including clusters of cellar doors, authentic land-based, agritourism and marine experiences, complemented by high quality eco-accommodation in vibrant towns that deliver day and night time experiences year-round, visitors will feel compelled to choose the East Coast as their holiday destination.

Future potential lies in linking the Tasman Peninsula with the East Coast through the sealing of Wielangta Road which will enable direct access between the two serial World Heritage sites of Port Arthur and Maria Island as a longer journey.

Allied with the drive journey, the East Coast currently sees many cyclists following the coast, despite the limitations of the road network in terms of safety. A coastal pathway suited to walking and cycling, which parallels the drive journey, would be a game changer for the region.

These initiatives have the potential to make the East Coast one of the world's greatest drive and cycle journeys.





## WHAT IS REQUIRED

- Strengthen the attraction of the GED through road improvements including lookouts and stopping points
- Investment on sealing of the Wielangta Road
- Continued growth and promotion of the winery, seafood and agritourism experiences
- Experience development with industry to grow the number and diversity of authentic experiences through new business (e.g. whale watching) and partnerships between operators
- Seek investment in innovative new eco accommodation
- Feasibility study of a coastal shared trail that links the national parks and towns of the East Coast to enable people to walk or cycle the entire coast
- Create awareness of the temperate climate and year round opportunities of the East Coast
- Develop linking experiences into Port Arthur and further north to Launceston making it one of the world's great drive journeys (once Wielangta Road is sealed).
- Recognise and promote the strength of experiences associated with the 'bookends' of adventure to the north of the region (MTB, golf, walking) plus heritage, food and wine in the south etc



# STRATEGIC PRIORITY 6

## INDUSTRY DEVELOPMENT FOR BUSINESS CAPACITY AND CAPABILITY BUILDING TO CREATE INNOVATIVE INDUSTRY PARTNERSHIPS

STRATEGY	ACTIONS REQUIRED	TIMING	LEAD	SUPPORT
6.1 Encourage Tourism businesses to develop their capability and digital presence	6.a Support operators through programmes that will enable them to lift the quality of the visitor experience, Health and Safety, their environmental impact, and their marketing, commercial and business acumen	Short / ongoing	ECTT	DSG, THA, VXT, ST, East Coast Partners
	6.b Continue to assist current and future operators develop digital capacity and competencies, including ATDW	Medium / Ongoing	ECTT	DSG (Digital Futures), THA, VXT, ST, East Coast Partners
	6.c Survey to be conducted with the East Coast Tourism Industry to determine the most effective structure for training	Short	ECTT	East Coast Partners
6.2 Provision of support through resources and grant opportunities	6.d Provide information and resources in regards to Government loans schemes, grants and grant writing workshops	Short	ECTT	DSG, ET



# APPENDICES

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# APPENDIX A – AUSTRALIAN TRAVEL

Pent up travel demand from domestic visitors is already seeing increase across Australia.

Based on results from the first quarter, it is estimated that nationally 113 million overnight trips by the end of 2021, which is only 4 million short of pre-COVID levels.

Based on this trajectory, which factors in ongoing demand, government response, travel restrictions and consumer confidence, forecast domestic overnight trips will increase to 134 million by 2023, 14% increase on 2019 levels.

85% of Australians now feel it is safe to travel domestically.

While international travel is not expected to recover to pre-COVID levels until at least 2023, current projections based on demand indicate an international travel arrival boom will be 7% higher than 2019 levels.<sup>5</sup>

Over 70% of Australians have no plans to travel internationally for a while.

Intrastate visitation across Australia is at an all-time high, with January 2021 recording national intrastate visitor numbers increasing 3% to 7.7 million compared with January 2020 and expenditure increasing 17% to \$5.3 billion. February 2021 also recorded year on year 2% to 5.3 million. Strong demand for: Nature and outdoors; Road trips; Regional experiences.

Domestic leisure visitors expect to spend approximately 5 nights away from home on their next trip.

Intrastate visitation for Tasmania also reached record levels of 1.68 million trips for year-end March 2021 ( 11% increase year on year) and expenditure 36% increase to \$694 million.<sup>6</sup>

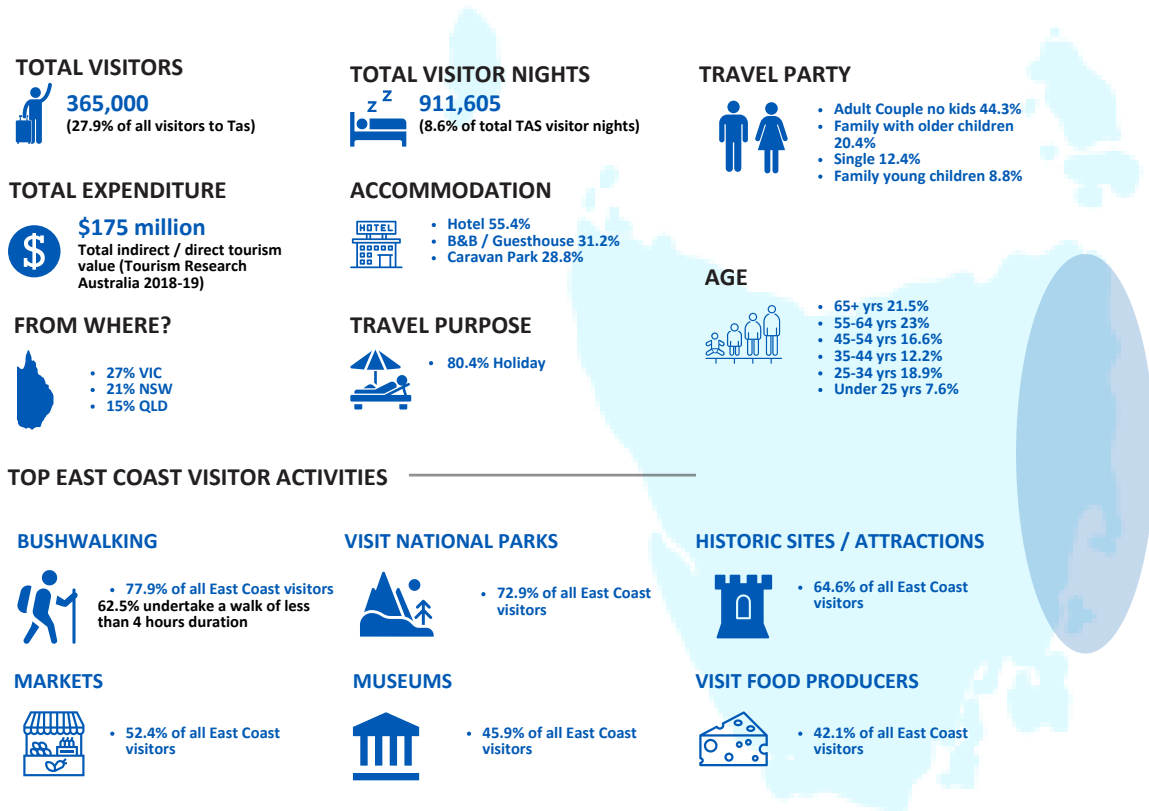
Average per person overnight spend also increased. This continued into February 2021 with \$412 average per person, representing 23% increase year on year.

<sup>5</sup> 2021 *Tourism and Hotel Market Outlook, Deloitte Access Economics*

<sup>6</sup> *Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021*

<sup>7</sup> *Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021*

# APPENDIX B - EAST COAST TASMANIA TOURISM



SOURCE: TVS Analyser March 2020  
 Tourism Research Australia Regional Tourism Satellite Account, East Coast Tasmania 18-19

## TOTAL INTERNATIONAL VISITORS TO TASMANIA:

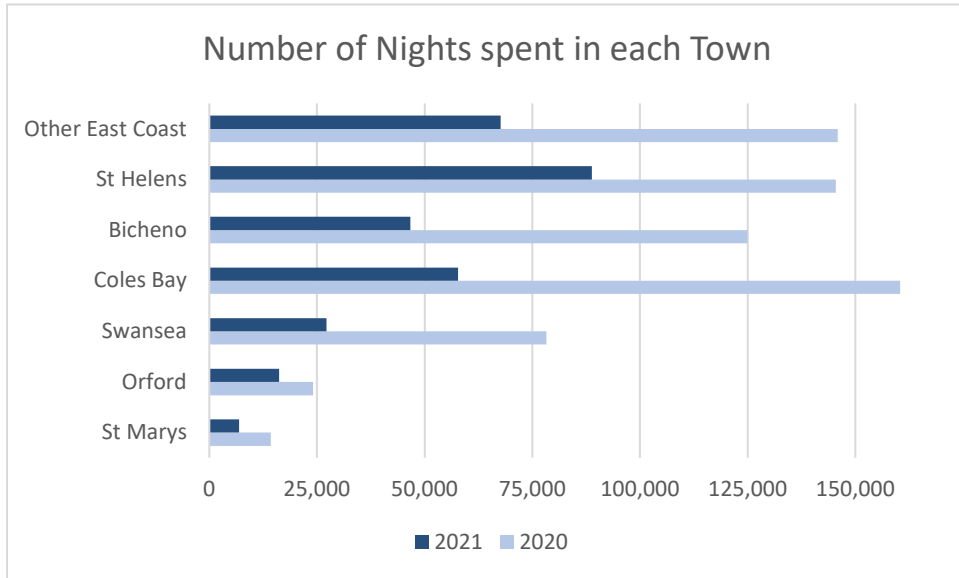
- 254,000 (approx. 19.5% of all Tasmanian visitors)
- Purpose: 79% holiday

## MAIN MARKETS:

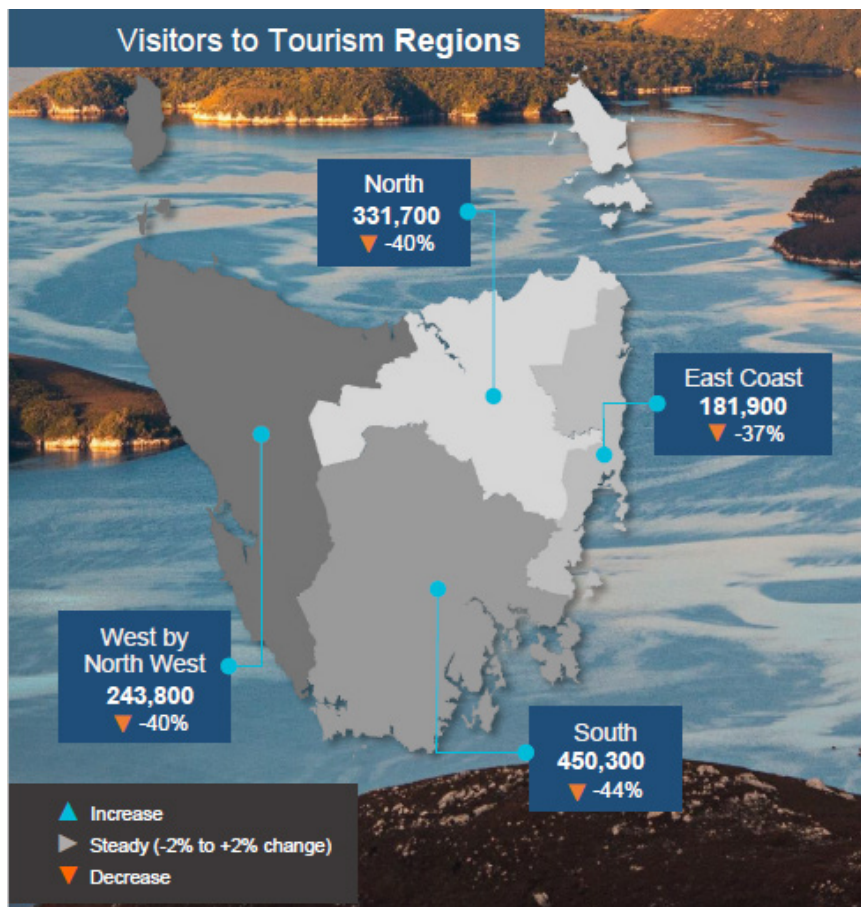
- USA – 15%
- China – 13%
- UK – 10%
- Hong Kong – 10%
- NZ – 7%

*Year end March 2020 (pre-international travel restrictions)*

# APPENDIX B - EAST COAST TASMANIA TOURISM



Tourism Tasmania RTO Snapshot, year ending March 2021



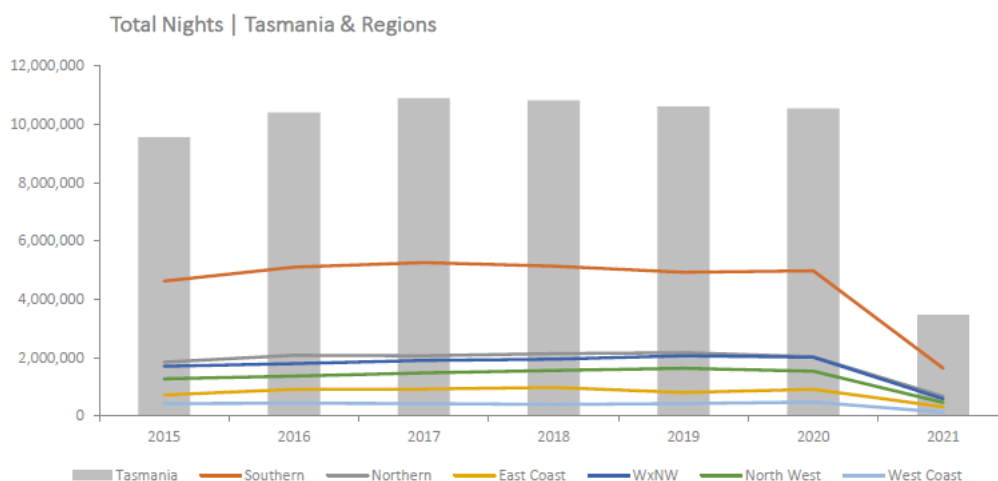
Tourism Tasmania Tourism Snapshot, year ending June 2021



# APPENDIX B - EAST COAST TASMANIA TOURISM

## Total nights in Regions

TVS YE March 2021



Nights	2015	2016	2017	2018	2019	2020	2021
Tasmania	9,561,725	10,412,790	10,904,704	10,825,243	10,621,359	10,544,978	3,463,907
Southern	4,625,241	5,106,178	5,262,055	5,143,404	4,925,909	4,983,494	1,635,962
Northern	1,847,930	2,084,545	2,061,452	2,140,817	2,170,645	2,029,009	666,825
East Coast	718,830	915,024	922,707	978,429	805,144	911,605	311,368
WxNW	1,699,430	1,796,928	1,900,529	1,947,502	2,063,757	2,013,782	584,793
North West	1,275,072	1,364,811	1,479,323	1,557,454	1,634,261	1,538,613	459,025
West Coast	424,358	432,117	421,206	390,049	429,496	475,169	125,768
<b>Share of TAS</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
Southern	48%	49%	48%	48%	46%	47%	47%
Northern	19%	20%	19%	20%	20%	19%	19%
East Coast	8%	9%	8%	9%	8%	9%	9%
WxNW	18%	17%	17%	18%	19%	19%	17%
North West	13%	13%	14%	14%	15%	15%	13%
West Coast	4%	4%	4%	4%	4%	5%	4%

Tourism Tasmania RTO Snapshot, year ending March 2021

# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## DEPARTMENT OF STATE GROWTH

### ABOUT

The department consists of five Divisions that work together – Business Services, Cultural and Tourism Development, Industry and Business Development, Renewables Tasmania and the Transport Services Group. The collaboration of Divisions works across industry and services that include investment attraction, transport, infrastructure, cultural industry and tourism supply development, trade, international relations, innovation, energy, resources and region and sector development.

### ROLE

The Department's role is to drive economic growth and support the community, industry and business in the creation of jobs and opportunities for Tasmanians.

### RESPONSIBILITY

Within the Department, the Cultural and Tourism Development Division develops policy and programs to deliver economic and social outcomes through the cultural and creative sectors, which include:

- Arts Tasmania
- Events Tasmania
- Screen Tasmania
- Tasmanian Museum and Art Gallery
- Tourism & Hospitality supply side unit

The Tourism and Hospitality Supply-side Unit (THSU) has a primary focus on supporting the Tasmanian tourism industry's capability, capacity and community to deliver great visitor experiences.

The THSU works together with Tourism Tasmania, playing an integral part in the delivery of the T21 Visitor Economy Action Plan 2020-2022, including the co-delivery of the Tasmanian Drive Journeys and Agritourism Strategy.

The Department works together with the Regional Tourism Organisations, industry associations, tourism businesses and the Tasmanian Visitor Information Network on identifying and delivering goals in line with T21.



# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## TOURISM TASMANIA

### ABOUT

Tourism Tasmania is the Tasmanian Government's tourism marketing agency.

### ROLE

The agency's role is to create demand for travel to Tasmania by connecting people culturally and emotionally to the state through domestic and international marketing programs that activate the Tasmanian tourism brand.

### RESPONSIBILITY

- Marketing partnerships with domestic and international carriers, travel retailers and brand partners
- Working with stakeholders - Tourism Tasmania is the lead agency in achieving the government and tourism industry's shared T21 Tasmanian Visitor Economy Strategy. The agency works together with the Department of State Growth and other government and non-government stakeholders responsible for ensuring the growth of Tasmania's visitor economy is matched with adequate air and sea access, new tourism experiences, accommodation and infrastructure, and a suitably skilled workforce
- Regional tourism - Tourism Tasmania supports the state's four regional tourism organisations, encouraging a strong regional tourism sector capable of undertaking industry development, capacity-building and tourism marketing programs for their region
- Travel information - Travel information for visitors is available on Tourism Tasmania's official travel website [www.discovertasmania.com.au](http://www.discovertasmania.com.au)



# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## EAST COAST TASMANIA TOURISM

### ABOUT

East Coast Tasmania Tourism is the regional tourism organisation for the East Coast of Tasmania covering the municipalities of Glamorgan Spring Bay and Break O’Day. Working closely with State and Local Government, local Destination Action Plan Groups as well as local tourism and tourism related) businesses. This not-for-profit organisation’s aim is to grow and serve the East Coast tourism sector working in partnership to deliver rewarding, sustainable and lasting economic, environmental and social outcomes.

### ROLE

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.

### RESPONSIBILITY

- Leadership - Proactively provide regional industry and visitor economy leadership in delivering the priorities and outcomes of the T21 strategy to grow regional visitor economies.
- Advocacy - Provide a voice for the region’s tourism industry, publicly representing our interests and common goals within government and community.
- 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.
- 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.
- 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.

# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## TOURISM INDUSTRY COUNCIL TASMANIA (TICT)

### ABOUT

Tourism Industry Council Tasmania (TICT) is the peak body representing the Tasmanian tourism industry. The not-for-profit organisation brings the Tasmanian tourism industry together through its large, representative and voluntary Industry Council.

### ROLE

TICT's role is to represent the Tasmanian tourism industry with a strong and united voice and to advocate outcomes that benefit our operators, the broader visitor economy and the Tasmanian community. Working with the tourism industry, partners and stakeholders, TICT facilitates world class visitor experiences, sustainable growth and profitability for tourism operators; and a buoyant Tasmanian visitor economy.

### RESPONSIBILITY

Tasmanian tourism industry leadership:

- Advocacy, policy and procedures and governance structure
- Active media presence, engagement with operators, stakeholders and the broader community in priorities and initiatives
- Initiate projects, research activities and events that stimulate industry, future growth and development of the Tasmanian Tourism industry and visitor economy

Foster successful partnerships with industry, government and the community including:

- Collaboration with organisations working within the tourism industry on shared policy and priorities
- Engaging with industry bodies and organisations contributing to the visitor economy. Pursue opportunities to further engage with the Tasmanian community in opportunities to grow the tourism industry and visitor economy
- Working with Tasmanian Government partners to progress T21 priorities

Service delivery including:

- Australian Tourism Accreditation Program, Star Ratings and Tasmanian Tourism Awards
- Industry events including the annual Tasmanian Tourism Conference and engagement with businesses and organisations in TICT programs and events
- Pursue new services that align with core program and add-value to operators
- Work with Australian Tourism Industry Council colleagues to ensure quality tourism programs remain contemporary to tourism operators and the visitor market
- Foster mutually beneficial partnerships with commercial partners committed to the tourism industry



# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## TOURISM VISITOR INFORMATION NETWORK

### ABOUT

The Tasmanian Visitor Information Network Inc. (TVIN) is a network of Visitor Information Centres strategically located throughout Tasmania who provide a quality service for visitors. Identified by the nationally accredited blue/yellow ‘i’ logo, centres are generally not-for-profit and funded through membership fees and other government grant funding.

### ROLE

TVIN accredited visitor centres, operating under national guidelines and identified by the blue sign with the yellow i, offer high levels of personalised customer service including itinerary planning and a state-wide booking service.

### RESPONSIBILITY

For visitors, the TVIN provide:

- Free information and itinerary planning
- Maps and directional information
- Information and booking services for accommodation and tours state-wide
- Information on attractions, events, retail outlets and local services
- Information on road conditions and transport options
- Unbiased local knowledge

Strategically for members and the tourism industry, the TVIN is represented by a Management Group made up of Board members from across each of the four regions. An Executive Officer is employed by the TVIN and accountable to the Management Group. The Group is responsible for:

- Addressing visitor servicing issues of state-wide significance
- Reviewing membership applications
- Monitoring ongoing compliance with the Accreditation Guidelines
- Developing an annual budget, business plan and funding applications on behalf of the Network
- Conducting an annual Conference
- Individual Centres are responsible for developing their own business plans and operating structures.

# APPENDIX C – TOURISM ROLES AND RESPONSIBILITIES

## TASMANIAN PARKS AND WILDLIFE

### ABOUT

The Tasmania Parks and Wildlife Service (PWS) was established in 1971 to present, protect and manage Tasmania's extraordinary landscapes in partnership with the community. The PWS is a division of the Department of Primary Industries, Parks, Water and Environment.

### ROLE

The role of the PWS is to manage 49 per cent of the land area of Tasmania which includes three World Heritage sites, 19 national parks and over 800 reserves (including Crown lands) covering 2.9 million hectares of land and water. We are also responsible for the future potential production forest (FPPF) lands comprising 412,000 hectares.

### RESPONSIBILITY

- Present, protect and manage landscapes in partnership with the community including Tasmanian Aboriginal people and their connection to country
- Partner with other government divisions on shared corporate priorities to manage the State's natural, Aboriginal and historic heritage, to grow and protect primary industries, to regulate land, water and the environment and to manage threatened species and wildlife
- Partner with statutory bodies such as the National Parks and Wildlife Advisory Council to ensure the PWS approach is aligned with community expectations and all levels of government. Partner with other organisations such as Wildcare Inc, one of Tasmania's largest and fastest growing volunteer organisations, to deliver an extraordinary program of volunteer time and effort
- Balancing State Government and PWS priorities with cultural, personal, economic, recreation, natural, visitor and tourism benefits



# APPENDIX D – TASMANIA TARGET MARKETS

## RAW URBANITES – NURTURING SENSITIVE, HONEST AND REAL

HOLIDAY HABITS	More likely to take a longer holiday, and as a result spend more. Seeking down days as well as fun things to do, completely turn off, happy to be (mostly) disconnected. Anxiety high in planning stages of journey.
PREDISPOSITION TO TRAVEL	More likely to 'go off the beaten track'. They often have too much annual leave or suffering work stress so may be prompted to take holidays by their workplace. Longer period between returning and starting to dream for the next holiday.
AGE*	Spread across spectrum, however skew older 50+ age group
LOCATION	More likely NSW and VIC than other states. Predominantly metro, through Raw Urbanites are more likely than Erudites to live outside Sydney and Melbourne.
LIFE STAGE *	Any life stage, but skew to empty nesters (30% and slightly skew to older families.
SPENDING HABITS	Earn marginally less than Erudites, but they are willing to spend a longer time on holidays, to relax and reconnect with their loved ones.
WHAT THEY SEEK AND WHY THEY TRAVEL	Interactions that are engaged, honest, pure and real, without cynicism or hidden agenda. Their communal nature seeks an outward connection with others, as well as the natural environment. The counter structure to the hectic, busy daily lives they lead is serious inner peace and finding themselves through being away from materialism, and unnecessary technology. Seek opportunities to switch off, refresh and rejuvenate through nature and rebuild connections. They need 'mindful moments' in holidays which allow them to be present, in order to return to everyday life refreshed.
EXPERIENCES THEY VALUE	Seek moments of peace, connection, inspiration and captivation. Types of experiences they value (in order of importance) are: <ol style="list-style-type: none"> <li>1. Natural experiences</li> <li>2. Australian product</li> <li>3. Return to basics</li> <li>4. Local immersion</li> </ol>



# APPENDIX D – TASMANIA TARGET MARKETS

## ERUDITES – KNOWLEDGEABLE AND CULTURED, CLEAR AND COMPOSED

HOLIDAY HABITS	Pre-planners, squeezing in as much activity as they can. High yielding and become destination advocates. More inclined to share their travels on social media. Fear of missing out so seek information before and during holiday.
PREDISPOSITION TO TRAVEL	Less inclined to disperse; they are ‘pulled’ to destinations by product innovations and events, and will actively engage with the destination when there. Very little gap between returning and starting to dream about the next holiday. Trigger to Travel is the pull of exploring and destination.
AGE*	Spread across the spectrum, no skews.
LOCATION	More heavily metro-based than Raw Urbanities, and more likely to be in Sydney or Melbourne.
LIFE STAGE *	Any life stage, slightly over indexing as empty nesters or single.
SPENDING HABITS	Not afraid to ‘Splash out’ and like a little luxury in their travel.
WHAT THEY SEEK AND WHY THEY TRAVEL	Holidays for Erudites are about switching on rather than switching off. Unique experiences with rich culture, deep heritage, innovation and intrigue. Their self-contained nature seeks enrichment through reflection, discovery, contemplation and self-expression. The acquisition of Knowledge and need to be a cultural pioneer is central to their travel motivations, and expressing themselves in paramount.
EXPERIENCES THEY VALUE	Seek stimulation and enrichment. Types of experiences they value (in order of importance) are: <ol style="list-style-type: none"> <li>1. Cultural immersion</li> <li>2. Gourmet dining</li> <li>3. Natural experiences</li> <li>4. Australian product</li> </ol>





East Coast Tasmania Tourism ABN: 20 205 382 807

PO Box 115, Bicheno TAS, 7215

E [info@eastcoasttasmania.com.au](mailto:info@eastcoasttasmania.com.au)

[www.eastcoasttasmania.com.au](http://www.eastcoasttasmania.com.au)

[@eastcoasttasmania](https://www.instagram.com/eastcoasttasmania)