



NORTHERN TASMANIA

Destination Management Plan

Refreshed July 2023



This report was originally prepared for Visit Northern Tasmania by TRC Tourism, funded by the Tasmanian Department of State Growth. It was refreshed internally in 2023 to align to the newly released 2030 Visitor Economy Strategy.

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Acknowledgement

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.



Scottsdale

Photography credit: Health Holden

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EXECUTIVE SUMMARY

The vision for Visit Northern Tasmania is:

We are a community of hosts, caring for, and sharing our adventures, living history and gastronomic experiences with our Visitors.

We are Northern Tasmania.

YOU WILL GROW HERE.



To achieve that vision over the next three years, we are focusing our activities on four main pillars.

PILLAR 1

Indulge in our creative city

Launceston – or Launnie for short – is a close-knit community that always has time for people, time to connect.

PILLAR 2

Choose your own adventure

Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places.

PILLAR 3

Explore our living history

Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who own these truths.

PILLAR 4

Connect and grow

Be part of a genuine slice of Tasmanian life sharing produce and bounty through the people that grow here.

Positive impact is core to all pillars

We have set ourselves a number of goals to achieve these:

Our Goals

- Manage expectations (industry and visitors) – Tassie time – positive impact voice
- Build sense of place
- Be respectful of country, aboriginal stories/history on the land
- Grow events that celebrate the regional strengths including gastronomy, agritourism, heritage and nature
- Grow the opportunities for a range of sporting and cultural events through building and utilising excellent facilities and venues
- Grow the night time economy
- Improve and advocate for investment into visitor experiences across the region to encourage dispersal
- Increase the value of the visitor economy to the region through responsible and sustainable growth
- Connect visitors to the source of produce
- Encourage our visitors to experience life like a local

INTRODUCTION

The Tasmanian Government, Local Government Areas (LGAs), tourism industry and the four Regional Tourism Organisations (RTOs) are united in the development of regional Destination Management Plans (DMPs) for 2022–2025.



Delamere Vineyards
Photography credit: Adam Gibson

The new 2030 Visitor Economy Strategy is the overarching State-wide document developed in collaboration between the Tasmanian State Government and Tourism Industry Council of Tasmania (TICT), setting the goals and priorities for tourism in Tasmania.

This State Strategy sets out a common vision, values and priorities for the sector. It provides certainty and confidence for decision making and investment, and it outlines what government will do to enable and support industry.

Aligned to this, all DMPs will reaffirm the Positive Impact core of the 2030 Visitor Economy Strategy by determining strategic priorities for each region and directing collective investment of effort to achieve this and all goals under the 8 Key Directions.

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

The visitor economy is very important for Tasmania contributing 6% share of Gross State Product – the highest in the country – and providing 13% share of total Tasmanian jobs, more than agriculture, fishing, forestry and paper production sectors combined. Visitor growth forecasts and population growth indicate that our visitor economy will continue to grow and will remain a leading economic sector for the state. Investment and careful management of our unique island and assets will be required to deliver and manage that growth.

The things that make Tasmania different are clear, but our vision requires a focus on growing, leveraging and protecting these competitive advantages.

Now is the opportunity to make a difference to our future. The State Strategy and this DMP sets out the principles and values that have our Tasmanian brand at their core and will guide our future decision-making. The purpose of this strategy is to provide our collective longer-term vision for Tasmania's visitor economy – a vision that provides clarity to our community on what it can expect from our visitor economy, and clarity to industry and government on agreed priorities and accountabilities to achieve this vision for the benefit of Tasmania.





George Town

WHERE WE ARE NOW

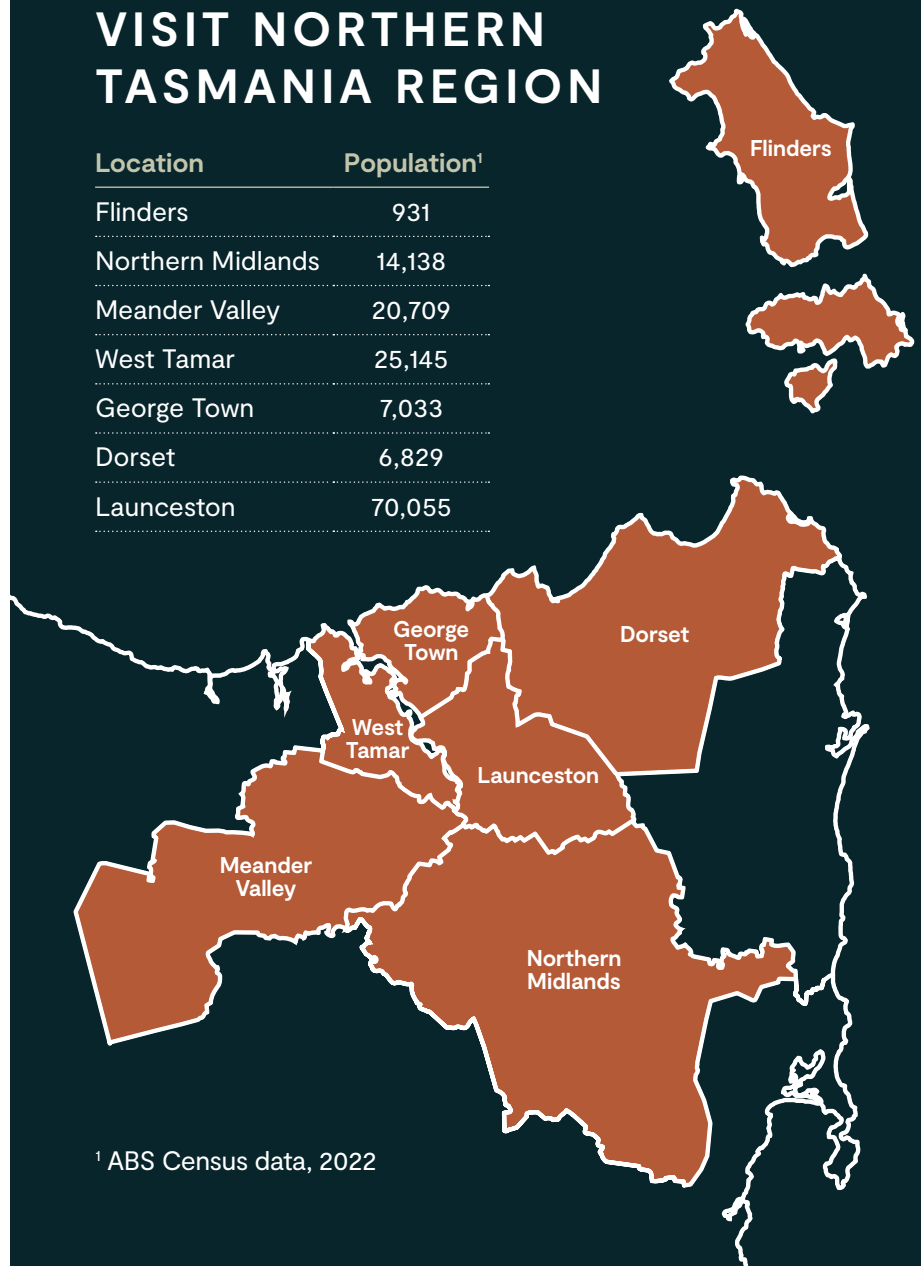
Northern Tasmania

The VNT region crosses the traditional land and seas of the Palawa Aboriginal people. A diverse region, stretching from the wilderness of the Great Western Tiers across to the North East, from the southern town of Ross to the Furneaux Islands interspersed with rich agricultural lands full of unique offerings such as lavender, truffles, cool climate wines and seafood. Colonial History is strongly preserved across the region, with UNESCO World Heritage listed Convict Sites and stories of early 19th Century life. Adventure abounds across the region, from walks in UNESCO World Heritage listed Tasmanian Wilderness, two of Australia's top public golf courses, world renowned wild brown trout fly-fishing through to globally recognised mountain biking trails. At the heart is Launceston, a vibrant cultural hub, now certified as a UNESCO Creative City of Gastronomy.

The region comprises seven Local Government Areas, including Flinders and surrounding Islands, a stand-alone nature based destination, and home to a living lab exploration of regenerative tourism.

VISIT NORTHERN TASMANIA REGION

Location	Population ¹
Flinders	931
Northern Midlands	14,138
Meander Valley	20,709
West Tamar	25,145
George Town	7,033
Dorset	6,829
Launceston	70,055



¹ ABS Census data, 2022

CURRENT REGIONAL HIGHLIGHTS



Launceston Life

There's something that lies beneath the surface here that defines us as a city. You may not see it at first, but the moment you step foot here, you feel it. You sense it in the architecture, in the streets, out in nature, between the people — an undercurrent — born from generations of hard-work, curiosity, community, resilience, independence. The meeting place of three waterways, our beautiful city has been a cultural hub and gastronomic centre for more than two thousand generations. The first to love this land were the Tasmanian Aboriginal people. Today, around 110,000 people call Launnie home. There are no tourists here — just locals and temporary locals still discovering their true north. Our close-knit community always has time for people, time to connect. Here, the farm gate is the local store, nature is our playground, and the cellar never runs dry.



Gastronomical Delights

Northern Tasmania is home to unique produce, tasting and purchasing opportunities. From amazing local produce such as pork and beef, truffles, lavender ice cream, leatherwood honey, rhubarb, famous beer, wines and gin and of course, seafood. In addition to farm gate, markets and other food related experiences, northern Tasmania celebrates all things food and drink through festivals and events — including AgriCULTURED, the Tassie Scallop Fiesta, NORTH Festival, long table lunches and Festivale.



Heritage and Culture

Northern Tasmania has a range of historical experiences on offer, with convict built structures and restored heritage buildings providing insights into settlement history. Many convict and settlement stories are shared in our historic villages and the UNESCO World Heritage listed convict sites of Brickendon and Woolmers Estates. Understand our history at the Queen Victoria Museum and Art Gallery, the Beaconsfield Mine and Museum, or the Bass & Flinders Maritime Museum.

Aboriginal culture and heritage are also rich throughout the region with experiences such as Kooparoona Niara Tours and wukalina Walk. However broader awareness and acceptance of aboriginal culture, language and storytelling presents an opportunity for growth.



Events Destination

Northern Tasmania hosts a huge calendar of events across the year, from summer highlights such as Festivale and Mona Foma through to the winter treats of Tassie Scallop Fiesta and AgriCULTURED and Junction Arts Festival which heralds in the spring to Launceston each year. There's an event for food, wine, music and even craft - the annual Tasmanian Craft Fair in Deloraine attracts over 20,000 patrons! Sporting events are well catered for from cycling to horse racing to the Hawthorn AFL home games at UTAS Stadium. Professional events including conferences and retreats are attracted here for the laid back creative atmosphere and gastronomical delights.

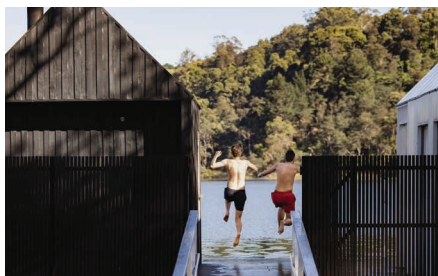


Derby

Photography credit: Flow Mountain Bike

Natural Resources

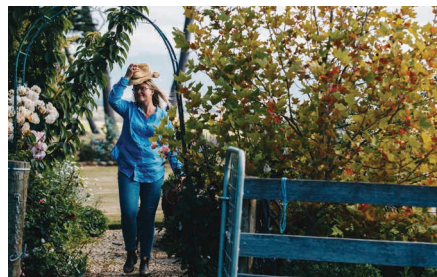
Northern Tasmania has a range of national parks and reserves, soft and active adventure on offer. The alpine plateau experience of Ben Lomond delivers a range of experiences across the seasons, from soft adventure skiing in winter, to rock climbing, abseiling and hiking at other times of the year. The region is also home to some of the World's best golf courses, flyfishing, ziplining in the Hollybank Reserve, Hot Air Ballooning, and walking through UNESCO World Heritage listed Tasmanian Wilderness to a range of beautiful sites such as Liffey and Meander Falls and the Mole Creek / Marakoopa Caves.



Approachable Adventure

Located in temperate rainforest in north-east Tasmania, the Blue Derby Mountain Bike Trails encompass some of the most stunning landscapes in the state. The MTB experience offered has firmly placed Derby on the map, now a vibrant tourism hub, attracting mountain bike enthusiasts, friends and family from around the world. The Trails are now globally famous, having

hosted World Enduro events in 2017, and 2019. Complementing Blue Derby are the recently launched Mt George and Tippogoree Hills mountain bike trails near George Town, offering quality ride experiences just 30 minutes from



Launceston city.

Slower Pace - Regenerative Tourism

Northern Tasmania offers an enviable lifestyle characterized by a slower pace, a strong sense of community, minimal traffic, and easy access to nature. With four distinct seasons, the region is under constant transformation, providing a range of experiences depending on the time of year. Tasmania is renowned for its pristine air and water, vast wilderness areas, delicate ecosystems, and unique wildlife. Northern Tasmania is perfect for those who are yearning for a slower pace, engagement with the community, deeper connections with loved ones, a mindful approach to life, and the opportunity to make a positive impact. While big city lights and round-the-clock



convenience may be absent here, there is ample space and time for rejuvenation and renewal.

Convenient Access

A short one-hour flight from Melbourne or a one-hour drive from Devonport, access to Northern Tasmania is convenient by air or by sea. Launceston airport is located 15 minutes from the city of Launceston. Direct air services are available from several major cities in Australia. A regular, nightly ferry service operates across Bass Strait offering additional day sailings during peak demand periods. A good network of sealed roads act as a conduit to the broader region with many attractions in easy reach. Well defined trails offer convenient access to explore wilderness areas. A plethora of cellar doors and farmgate experiences give direct access to producers and the fresh produce that the area is renowned for.

THE OUTLOOK FOR VISITOR ECONOMY GROWTH THROUGH TO 2030

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

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

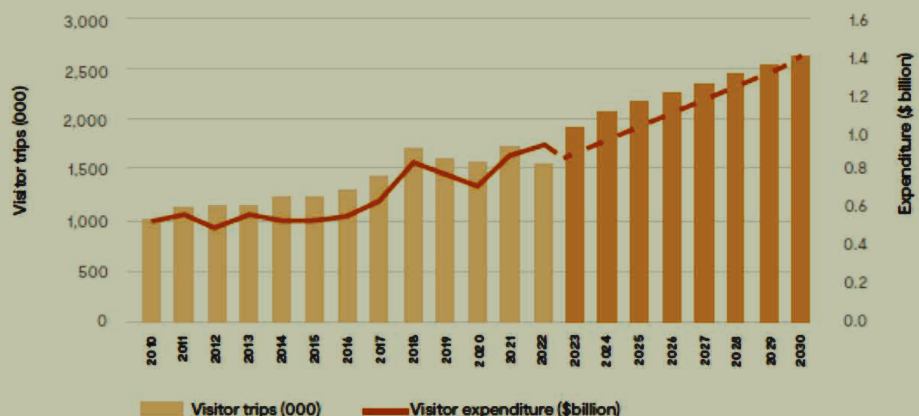
The associated annual visitor expenditure from international and interstate visitors could grow to \$5.6 billion by 2030, more than double the value at 2019, with an average annual growth of 4.8% across 2025 to 2030. From 2025, after the market settles following the disruption from the COVID-19

pandemic, spending associated with international visitors expenditure is expected to grow at a faster rate than that of interstate visitors, 6.2% versus 4.6% nominal growth per annum.

INTERSTATE AND INTERNATIONAL VISITOR AND SPEND FORECAST TO 2030



TASMANIAN TRIPS AND SPEND FORECAST TO 2030





West Tamar
Photography credit: Ness Vanderburgh

STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS

Strengths

- Extent of heritage properties across the region
- Creative arts and settings – theatre, museums, festivals
- Flinders Island as an emerging regenerative tourism destination
- Diversity of walking experiences
- Globally recognised mountain bike trail destination, Blue Derby
- World class fly fishing
- x2 of the top five public Australian golf courses; Barnbougle Dunes and Lost Farm
- Accessibility from Spirit of Tasmania, Launceston Airport
- Winter snow sports for Tasmanians
- Gastronomy including world class wines, beverages and food produce
- Coastlines and national parks
- Agriculture and agritourism experiences
- The connectedness of the community and the land
- Event venues of a broad range of specifications
- x3 UNESCO Certifications for wilderness, convict heritage and gastronomy.

Weaknesses

- Perceptions as a gateway rather than a destination
- Limited range of accessible tourism experiences/services
- Safety perceptions of Launceston city at night
- Lack of staff and commitment to hospitality
- Lack of access/permeability of Tamar estuary
- Customer service/opening hours
- Local community awareness of visitor economy opportunities
- Family friendly offerings
- Public transport
- Lack of consistent RV friendly infrastructure across the region
- Low awareness of Launceston Airport by Australian travelling public
- Low levels of education in community and industry regarding aboriginal culture and language.



Opportunities

- Launceston certified as a UNESCO Creative City of Gastronomy
- Ferment Tasmania
- Opportunities to make Ben Lomond an all-year-round destination
- Active outdoor and night time settings in the city centre
- Greater activation of heritage assets (e.g. REASSIGN Heritage Interpretation initiative, connecting Drive Journeys with stories to historic villages/places)
- Aboriginal culture and language education of industry
- Master planning and further connection with Cataract Gorge
- Cool season events attraction and leveraging of existing major events
- Improved cross government / industry co-operation & communication
- Event hosting expanded through investing in UTAS Stadium, QVMAG Institute and a major business events venue
- Targeting family travel market
- New Spirit of Tasmania ferries with increased RV travellers
- Technological investment (e.g. augmented reality overlay/self-guided tours)
- Growth in activities sought pre and post event attendance
- New positioning and markets derived from Flinders Island's regenerative tourism pilot program.

Threats

- Continued uncertainty in visitor economy generated by unrest born of global events
- Competition from other destinations close to source markets
- Loss of market share
- Continued workforce capacity issues
- Lack of collaboration, leadership and investment
- Climate change induced events such as increased bush fires and floods
- Loss of inbound travel options through airline frequency/capacity changes and/or delays in new Spirit of Tasmania vessels launching
- Continued global disruption to the Tasmanian and interstate markets.

STRATEGIC ALIGNMENT

2030 Visitor Economy Strategy TASMANIA Vision

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

Northern Tasmania Vision

We are a community of hosts, caring for, and sharing our adventures, living history and gastronomic experiences with our visitors. We are Northern Tasmania. You will Grow Here

Visit Northern Tasmania Pillars

Visit Northern Tasmania pillars align with the Key Directions from the 2030 Visitor Economy Strategy.

PILLAR 1

Indulge in our creative city

Launceston – or Launnie for short – is a close-knit community that always has time for people, time to connect.

PILLAR 2

Choose your own adventure

Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places.

PILLAR 3

Explore our living history

Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who own these truths.

PILLAR 4

Connect and grow

Be part of a genuine slice of Tasmanian life sharing produce and bounty through the people that grow here.

Key Directions

8. We will manage our destination in harmony with community.

5. We will invest in and support a sustainable and successful events and business events sector.

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

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

6. We will plan for and invest in infrastructure for the next decade to support future growth benefiting locals and visitors.

8. We will manage our destination in harmony with the community.

8. We will manage our destination in harmony with community.

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

3. We will grow the contribution that visitors make to Tasmania and maximise overall benefit to our State and Regional Communities

8. We will manage our destination in harmony with community.

4. We will differentiate and build awareness of Tasmania to increase brand power and attract the visitors who will grow value over volume.

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

Annual Action Plan



Derby

NORTHERN STRATEGIC PILLARS

The following four strategic pillars were developed in 2022 through consultation with industry and refined in 2023 following development of the State 2030 Visitor Economy Strategy.

Photography credit: Tourism Australia

These pillars allow us to focus on areas of strength for the destination. The 2030 Visitor Economy Key Directions are intertwined across all of VNT's pillars. They ensure that there is a diverse experiential offering in the region that will appeal to new and existing target markets.

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Indulge in our creative city

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Be part of a genuine slice of Tasmanian life sharing produce and bounty through the people that grow here.

Our Goals

- Manage expectations (industry and visitors) – Tassie time – positive impact voice
- Build sense of place
- Being respectful of country, aboriginal stories/history on the land
- Grow events that celebrate the regional strengths including gastronomy, agritourism, heritage and nature
- Grow the opportunities for a range of sporting and cultural events through building and utilising excellent facilities and venues
- Grow the night time economy
- Ongoing improvements to and investment into visitor experiences across the region to encourage dispersal
- The value of the visitor economy to the region and Tasmanian increases through responsible and sustainable growth and yield across the region
- To connect visitors to the source of produce
- To help our visitors experience life like a local



PILLAR 1

INDULGE IN OUR CREATIVE CITY

Launceston – or Launnie for short – is a close-knit community that always has time for people, time to connect.

Why is this Pillar important?

There's something that lies beneath the surface here that defines us as a city. Our city is human scale. A real blend of old world and new, tradition and innovation. Our natural and built heritage, food, wine (and spirit) have drawn together a diverse community of makers, artisans and nature lovers from all over the world. Culture takes many forms and we've made life's simple pleasures an art. Our close knit community always has time for people, time to connect. Here the farm gate is the local store, nature is our playground and the cellar never runs dry.

How does this align to the 2030 Strategy Key Directions?

- We will manage our destination in harmony with community
- We will invest in and support a sustainable and successful events and business events sector



What are the goals of this pillar?

- Be recognised as a hub in which to stay in quality accommodation offerings
- Manage expectations (industry and visitors) – Tassie time – positive impact voice
- Build sense of place
- Being respectful of country, aboriginal stories/history on the land
- Grow events that celebrate the regional strengths including gastronomy, agritourism, heritage and nature
- Grow the opportunities for a range of sporting and cultural events through building and utilising excellent facilities and venues
- Grow the night time economy
- Student attraction – university city



What are the opportunities?

- City of Gastronomy
- Business Events
- Sport
- Accessibility
- RV friendly city (more literally)

What actions will we do to achieve these?

- Strengthen the experience Launceston offers and the 'creative city' feel through the UNESCO Creative City of Gastronomy
- Work with Launceston Gastronomy
- Work with Ferment Tas on their offering and experience
- Lead the feasibility study for improved convention facilities in Launceston
- Events calendar diversity including Cool Season
- Advocate for more accommodation choices

What won't we do?

- Lead or organise events in the City ourselves
- Replicate the work of Council or Events Tasmania

Who will we work with?

- City of Launceston
- West Tamar Council
- Business Events Tasmania
- Events Tasmania
- Launceston Tamar Valley Tourism Association

PILLAR 2

1 2 3 4

CHOOSE YOUR OWN ADVENTURE

Our region is the ultimate landscape to pursue riding, walking and year-round adventures that connect you with our exceptional natural places.

Why is this Pillar important?

Northern Tasmania has something for everyone – from beautiful beaches to soaring mountains, from rugged bush to beautiful waterways, this is the setting for a suite of soft adventure activities. Create memories and share the stories of careening down mountain bike trails, casting a fly fishing line, bushwalking, skiing, or spending time on the water. While connecting with the nature of the place, be mindful of the natural environment and be respectful of the country and its history.



How does this align to T30 Future Foundations

- We will be a leading destination for climate conscious travel
- We will proactively manage growth to protect and enhance Tasmania's brand, environment and community values
- We will plan for and invest in infrastructure for the next decade to support future growth, benefitting locals and visitors
- We will manage our destination in harmony with the community

What are the goals of this pillar?

- The value of the visitor economy to the region and Tasmania increases through responsible and sustainable growth and yield across the region
- Continue to grow and support the development of mountain biking in the region to maintain the mantle of Australia's premier mountain bike destination
- Strengthen awareness of the world class fly fishing and golf the region offers, and the proximity of these and other nature based adventures to the city
- The social licence for the visitor economy continues to grow, as does the committed skilled workforce.

What are the opportunities?

- Sustainable development of adventure products
- Showcase signature experiences to enable supplementary experiences to support these
- Explore opportunities at Ben Lomond
- Agritourism
- Accessibility
- Cataract Gorge
- Technology

What actions will we do to achieve these?

- Short walks across the region
- Mountain Biking
- wukalina Walk
- Ben Lomond as an all year round destination
- Launceston Urban Fringe Trail (LUFT)

What won't we do?

- Saturate the region with multiple experiences

Who will we work with?

- Blue Derby Foundation
- George Town Council
- Meander Valley Council
- City of Launceston
- Dorset Council



EXPLORE OUR LIVING HISTORY

Stories of how our convict past met an ancient aboriginal culture are shared honestly by locals who own these truths.

Why is this Pillar important?

The history of the region goes back 40,000 years. Sharing these stories from the Aboriginal past through to convict experiences through to the tin miners in the north east is one way of helping visitors to connect with our place. Working with locals who seek these truths, we use technology and artefacts to bring the past to life. We will continue to be respectful of country, to tell the stories as truthfully as possible, to highlight the history of the land whilst being protective and mindful of the natural environment.

How does this align to T30 Future Foundations

- We will proactively manage growth to protect and enhance Tasmania's brand, environment and community values
- We will grow the contribution that visitors make to Tasmania and maximise overall benefit to our State and Regional Communities.
- We will manage our destination in harmony with community

What are the goals of this pillar?

- To enable truth telling to help the visitor understand the true history of northern Tasmania
- Apply positive impact approach to tell these stories

- Grow the social licence for the visitor economy
- Being respectful of country, aboriginal stories/history on the land
- Ongoing improvements to and investment into visitor experiences across the region to encourage dispersal
- Apply an accessibility lens to tell the heritage stories
- Activate our heritage places and encourage visitors to understand the history of the region including working with the local Aboriginal community to enable them to share their stories

What are the opportunities?

- Educate ourselves and others to facilitate the sharing of this history
- Technology – augmented reality

What actions will we do to achieve these?

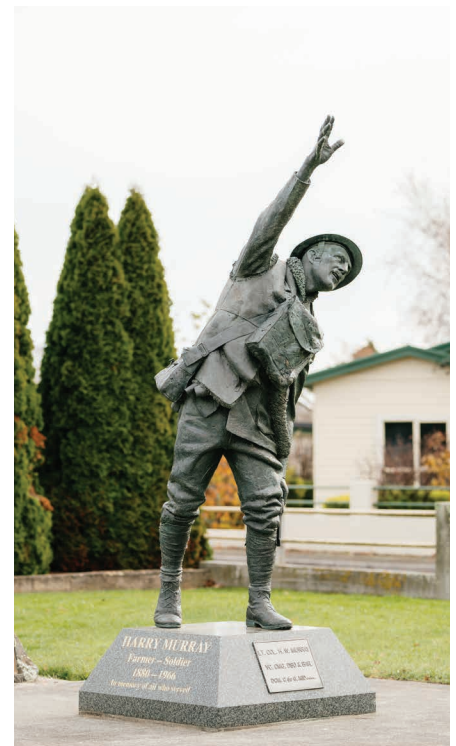
- Projects like REASSIGN
- Aboriginal culture programs
- Tin Dragon Trail
- Launceston streetscape interpretation
- Aboriginal interpretation through kanamaluka trail

What won't we do?

- Replace the storytelling of authentic storytellers

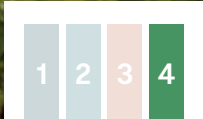
Who will we work with?

- QVMAG
- Aboriginal groups, TAC etc
- Historical associations





PILLAR 4



CONNECT AND GROW

Be part of a genuine slice of Tasmanian life sharing produce and bounty through the people that grow here.

Why is this Pillar important?

Northern Tasmania is a cornerstone of Tasmania’s food culture, community, and economy. This is where we applaud the dedication and passion of our local producers, revel in the joy of food, collaborate with farmers and producers, and connect with one another to help our visitors experience life like a local. Agritourism is a type of experiential travel which connects people to produce, delivered ‘on farm’ providing a connection to nature and helping people understand the source of their food. We bring our skills together to host events that celebrate this.

How does this align to T30 Future Foundations

- We will manage our destination in harmony with community
- We will differentiate and build awareness of Tasmania to increase brand power and attract the visitors who will grow value over volume
- We will attract a skilled workforce creating jobs for Tasmanians and meeting industry needs

What are the goals of this pillar?

- To connect visitors to the source of produce
- Work with wineries and cellar doors to build on the existing experiences and encourage further visitor engagement with growers, winemakers in ways that can encourage regeneration
- Manage expectations (industry and visitors) – that we work seasonally, not everything is available all the time
- To help our visitors experience life like a local
- Learn from the regenerative tourism ‘living lab’ on Flinders Island how community centric visitor hosting can establish a compelling nature based destination appeal
- Be known for innovation in agritourism and the experiences that can be delivered in the visitor economy through investment in Ferment Tas as a significant attraction as well as delivering extensive social and economic outcomes
- Develop the arts, cultural events and festivals calendar to connect with more locals and producers

What are the opportunities?

- Cool season gastronomical delights
- How the RV traveller can engage with producers
- Education – workforce development

What actions will we do to achieve these?

- Manage expectations – industry and visitors
- Industry development
- Flinders Island projects
- Agritourism
- Regenerative tourism
- wineries

What won’t we do?

- VNT’s role is to advocate for strategic goals that are not yet funded

Who will we work with?

- Ferment Tas
- Flinders Council
- Tamar Valley Wine Route
- University of Tasmania



HOW WILL WE DO THIS?



Launceston

Visit Northern Tasmania is funded through Tourism Tasmania, our seven local government areas, and some smaller membership associations. This funding directs us as the RTO to undertake the following activities:

- Regional Industry Leadership
- Industry development and capacity building
- Support for Destination Marketing
- Act as a referral point for product development and assistance for new businesses
- Organisational Effectiveness
- Tourism Strategy
- Destination Management and Local Action Planning
- Partnership Communications & Support
- Visitor Experience Advocacy & Development
- Partnership Marketing

The actions outlined in this Destination Management Plan will be conveyed to an Annual Action Plan and resourced in line with the business-as-usual activities we are funded to do. In many cases, these DMP actions are the strategic implementation of goals and key directions from the State Visitor Economy Strategy and local tourism strategies. They often complement our business-as-usual activities where we collaborate with tourism operators to provide the best experience to our visitors.

Annual Action Plan

The Annual Action Plan is the implementation plan for this Destination Management Plan. This is the organisation's annual strategic plan, and will include actions that VNT is either the lead agency for, has a facilitation role, or undertakes an advocacy role. The Annual Action Plan also contains a column for each pillar that determines what success will look like, and this will be measured and reported annually.



Photography credit: Revolution MTB



APPENDICES



APPENDIX A

AUSTRALIAN TRAVEL

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

Based on results from the first quarter, it is estimated that nationally overnight trips ▲ 113 million 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 ▲ 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 ▲ 7% higher than 2019 levels.³

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 ▲ 3% to 7.7 million compared with January 2020 and expenditure ▲ 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 ▲ 1.68 million trips for year-end March 2021 (p 11% year on year) and expenditure ▲ 36% to \$694 million.⁴ Average per person overnight spend also increased to This continued into February 2021 with \$412 ▲ 23% year on year.

³ 2021 Tourism and Hotel Market Outlook, Deloitte Access Economics

⁴ Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021

⁵ Tourism Tasmania Snapshot – National Visitor Survey, monthly domestic overnight visitation March 2021



APPENDIX B


NORTHERN TASMANIA TOURISM

NORTHERN TASMANIA

TOTAL VISITORS

 **699,000**
(53% of all visitors to Tas)

TOTAL VISITOR NIGHTS


 **2 million**
(19% of total TAS visitor nights)

TRAVEL PARTY



- Adult Couple no kids 38.6%
- Family with older children 22.2%
- Single 13.9%
- Family young children 11.9%

TOTAL EXPENDITURE

 **\$533 million**
Total indirect / direct tourism value (Tourism Research Australia 2018-19)

ACCOMMODATION




- Hotel - 51.8%
- Friends / relatives - 25.8%
- Guesthouse / B&B 25%

AGE

- 
- 65+ yrs 20.2%
 - 55-64 yrs 22.2%
 - 45-54 yrs 19.1%
 - 35-44 yrs 13.9%
 - 25-34 yrs 17.4%
 - Under 25 yrs 7.1%

FROM WHERE?



- 34.6% VIC
- 22.7% NSW
- 15% QLD


TRAVEL PURPOSE



- 56.3% Holiday
- 22.4% Visit friends / relatives
- 17% Business

TOP NORTHERN TASMANIA VISITOR ACTIVITIES

BUSHWALKING



- 55.5% of all Northern Tasmania visitors
- 45.2% undertake a walk of less than 4 hours duration

VISIT NATIONAL PARKS



- 48.1% of Northern Tasmania visitors

HISTORIC SITES / ATTRACTIONS



- 46.7% of Northern Tasmania visitors

MARKETS



- 37.4% of all Northern Tasmania visitors

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

Tasmanian International Visitation

Total international visitors to Tasmania: 254,000
(approx. 19.5% of all Tasmanian visitors)

Purpose: 79% holiday

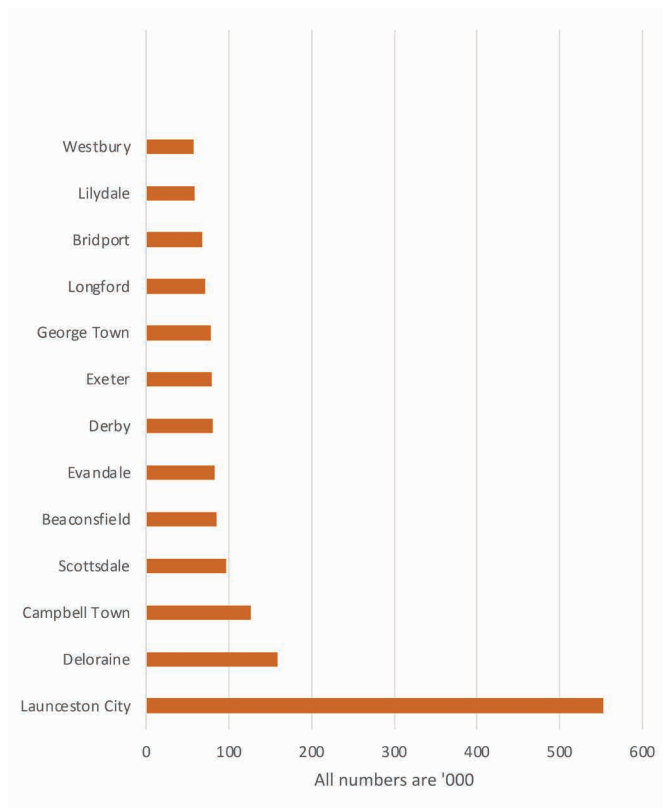
Main markets:

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

Year end March 2020 (pre-international travel restrictions)

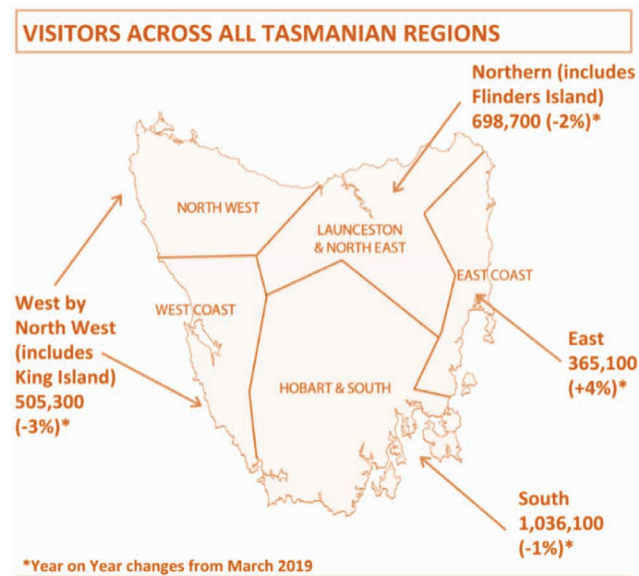
VISITED

Figure 1. Places visited Northern Tasmania ⁶



REGIONAL VISITATION

Figure 2. Annual regional visitor numbers for year end March 2020 ⁷



HOW NORTHERN TASMANIA COMPARES

Hobart and surrounds tops the list as Tasmania's most visited destination. This is followed by Launceston as Tasmania's northern arrival city and Devonport with the Spirit of Tasmania ferry arrivals (11% of all arrivals). ⁸

Top 10 places visited in Tasmania by visitor numbers

1	Hobart City (Destination Southern Tasmania)	943,000
2	Launceston City (Visit Northern Tasmania)	553,000
3	Devonport (West by North West)	303,000
4	Richmond (Destination Southern Tasmania)	261,000
5	Port Arthur / Tasman Peninsula (Destination Southern Tasmania)	247,000
6	Sorell (Destination Southern Tasmania)	236,000
7	Cradle Mountain (North by North West)	210,000
8	Coles Bay (East Coast Tasmania Tourism)	202,000
9	Bicheno (East Coast Tasmania Tourism)	192,000
10	Swansea (East Coast Tasmania Tourism)	173,000

APPENDIX C

TOURISM AGENCY ROLES AND RESPONSIBILITIES

Organisation	About	Role	Responsibilities
<p>Local Government Areas of:</p> <ul style="list-style-type: none"> · City of Launceston · West Tamar Council · George Town Council · Dorset Council · Flinders Council · Northern Midlands Council · Meander Valley Council 	<p>There are 29 local government areas in Tasmania and they represent the tier of government closest to the community. The VNT region covers 7 local government areas.</p>	<p>Under the Local Government Act, local government is responsible for economic development and tourism is a significant contributor to the Tasmanian economy. Many Councils provide a visitor information service, work with events, provide infrastructure for tourism related activities etc</p>	<p>To provide for the health, safety and welfare of the community</p> <p>To represent the interests of the community</p> <p>To provide infrastructure for the community</p>
<p>Tourism Tasmania</p>	<p>Tourism Tasmania is the Tasmanian Government's tourism marketing agency</p>	<p>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.</p>	<p>Marketing partnerships with domestic and international carriers, travel retailers and brand partners.</p> <p>Working with stakeholders – Tourism Tasmania 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.</p> <p>Regional tourism – Tourism Tasmania supports the state's four regional tourism organisations, to develop a strong regional tourism sector.</p> <p>Providing travel information for visitors via Tourism Tasmania's official travel website www.discovertasmania.com.au. and the Discover tas app.</p>

Organisation	About	Role	Responsibilities
Department of State Growth	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 Department’s role is to drive economic growth and support the community, industry and business in the creation of jobs and opportunities for Tasmanians.	<p>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</p> <p>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.</p> <p>The Department works together with the Regional Tourism Organisations, industry associations, tourism businesses and the Tasmanian Visitor Information Network on identifying and delivering strategic goals.</p>
Tourism Industry Council of Tasmania (TICT)	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.	<p>TICT’s role is to:</p> <p>To represent the Tasmanian tourism industry with a strong and united voice.</p> <p>To advocate outcomes that benefit our operators, the broader visitor economy and the Tasmanian community.</p>	<p>Provides leadership to the Tasmanian tourism industry through advocacy, policy & procedures; governance; and active media presence; and projects, events or research activities that stimulate industry, future growth and development of the Tasmanian tourism industry and visitor economy.</p> <p>Foster successful partnerships with industry, government and the community including:</p> <p>Delivers services such as Australian Tourism Accreditation Program, Star Ratings and Tasmanian Tourism Awards; Industry events including the annual Tasmanian Tourism Conference.</p> <p>Work with Australian Tourism Industry Council colleagues to ensure quality tourism programs remain contemporary to tourism operators and the visitor market.</p> <p>Foster mutually beneficial partnerships with commercial partners committed to the tourism industry.</p>

Organisation	About	Role	Responsibilities
Tourism Visitor Information Network (TVIN)	<p>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.</p>	<p>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.</p>	<p>For visitors, the TVIN provides a full suite of information including maps, bookings, up-to-date conditions and unbiased local knowledge:</p> <p>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 destinations. An Executive Officer is employed by the TVIN and accountable to the Management Group.</p>
Tasmanian Parks & Wildlife	<p>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.</p>	<p>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. PWS is also responsible for the future potential production forest (FPPF) lands comprising 412,000 hectares.</p>	<p>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.</p> <p>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.</p> <p>Balancing State Government and PWS priorities with cultural, personal, economic, recreation, natural, visitor and tourism benefits.</p>

APPENDIX D

TASMANIA TARGET MARKETS

TTAS Focus		
Positive Impact Travellers	Conscious Adventurers	Discoverers
 <p>Strong values around helping others and the environment.</p> <p>Highly sustainability conscious, wanting to visit sustainable destinations, help local communities, and immerse nature, culture and history.</p>	 <p>Similar to Adventurers but with more traditional values and both socially and environmentally conscious.</p> <p>They value contributing to their community, helping others and helping the environment.</p>	 <p>Driven to seek experiences off the beaten path.</p> <p>They immerse themselves in the experience, history and natural beauty of the places they travel and always want to leave the destination better than the found it.</p>

High value overlay
 Higher income >\$100
 Higher travel spend

Achievers	Adventurers	Experience Explorers	Simple Retreat Seekers
 <p>Value challenging themselves, developing skills and being successful.</p> <p>They want to immerse in nature and embrace different cultures while disconnecting and relaxing with friends and family.</p>	 <p>Want a range of diverse experiences to challenge themselves, learn and find their place in the world as individuals.</p> <p>They seek once in lifetime experiences, full of novelty, adventure, nightlife, and culture.</p>	 <p>Traditional family values looking for meaningful and impactful experiences, embracing nature and culture.</p>	 <p>Traditional family values, looking for easy, familiar getaways to disconnect with friends and family and help reduce anxiety.</p>

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