The Tasmanian Visitor Economy Strategy 2015-2020

[ www.T21.net.au ]
Tasmania is fast emerging as the place to experience. Over the past year, more visitors have travelled to our state than ever before – 1.15 million – that’s more than double our population.

We are on the verge of welcoming one million domestic visitors a year for the first time and we’ve seen a massive 38 per cent increase in Chinese visitors since 2014. These records have trained the spotlight on our state. Lonely Planet ranked us in the top four “must see” destinations in the world and our tourism operators received unprecedented recognition at the 2014 Qantas Australian Tourism Awards.

This is a trend we are keen to continue so we can reach our target of attracting 1.5 million visitors to our state every year by 2020.

We want to put Tasmania at the top of even more travellers’ must-do lists, so we’re investing additional funding in marketing, we’ve launched our state’s first Events Strategy and now we’re refreshing the Tourism 21 (T21) agreement.

This agreement has underpinned the partnership between the Tasmanian Government and industry for the past two decades.

But now is a watershed time for our tourism and hospitality industries, with unprecedented growth and a changing market, and this agreement must also change to reflect our future.

We have to make sure T21 paves a new path to the next stages of success for the industry.

Through T21, the Tasmanian Government and industry will work together on four priorities: growing demand for travel to Tasmania; expanding air and sea access; investing in quality tourism infrastructure and building capability, capacity and community.

The new agreement will be updated every six months to account for the rapid growth and changes of the sector and to ensure market dynamics and data tracking remain relevant.

Together we will ensure that Tasmania’s visitor economy continues to grow, attracting more visitors and creating more jobs.

The Honorable Will Hodgman MP
PREMIER
MINISTER FOR TOURISM, HOSPITALITY & EVENTS
Shared Vision

T21 is the partnership agreement between the Tasmanian Government and the Tasmanian tourism industry represented by the Tourism Industry Council Tasmania (TICT), that demonstrates a shared commitment to the growth and development of Tasmania’s visitor economy.

Together, our vision is for Tasmania to be a world-leading destination of choice, with a vibrant visitor economy supported by our tourism and hospitality industries, strong business and education sectors and a community that embraces our visitors and all the benefits they bring.

Our target is to grow annual visitor numbers to Tasmania to 1.5 million by 2020. This will generate visitor expenditure of around $2.5 billion per annum, greater capital investment and more jobs. In achieving this shared objective, direct tourism employment will grow to around 20,000.

Reaching this target requires Tasmania’s average visitor growth rate to be around 5.5 per cent a year to 2020. This is achievable if we adopt a collaborative approach across the visitor economy between government and industry that brings together the many sectors of our economy. We have an aggressive approach to marketing, growing air and sea access, investing in quality visitor infrastructure, developing new experiences and enhancing Tasmania’s brand.

T21 – The Tasmanian Visitor Economy Strategy places visitation at the core of Tasmania’s economic agenda through taking a strategic approach by government and industry to achieve 1.5 million annual visitors by 2020, and ensure the opportunities generated by this growth are shared across Tasmania.

The Honorable Will Hodgman MP
PREMIER
MINISTER FOR TOURISM, HOSPITALITY & EVENTS

November 2015

Simon Currant AM
CHAIR
TOURISM INDUSTRY COUNCIL TASMANIA
An Enduring Partnership

T21 is unique in Australian tourism as an enduring partnership agreement between the public and private sectors to guide the development of a major destination. Since the original Tourism 21 agreement in 1997, successive Tasmanian Governments have worked with the Tasmanian tourism industry through the Tourism 21 partnership process.

The Tasmanian Government supports the growth of tourism in the state by driving demand for Tasmania through the marketing activities of Tourism Tasmania and on the supply side primarily through the activities of the Department of State Growth and the Department of Primary Industries Parks Water and the Environment. These departments work collaboratively to provide and facilitate infrastructure, experience development and industry capability to underpin the Tasmanian visitor experience.

Across a range of agencies, the Government also invests in infrastructure, population growth, education, Antarctic pursuits, productive capability, advanced manufacturing and many other activities that enhance the Tasmanian brand.

Tourism Industry Council Tasmania (TICT) is the peak industry body representing the private sector in the Tasmanian tourism industry. TICT is a not for profit organisation governed by a board of industry representatives from sectors of the Tasmanian tourism industry and the broader visitor economy. It provides a strategic direction and united voice for the sustainable development and growth of the Tasmanian tourism industry, and advocates on their behalf on policy matters affecting the sector.

The Tasmanian Government and TICT as signatories to this agreement recognise there are many sectors of the Tasmanian economy and many organisations that have a critical role in realising the vision of a vibrant visitor economy in Tasmania and in achieving our target of 1.5 million annual visitors to Tasmania by 2020.

This includes all levels and agencies of the Tasmanian Government, local government, the Australian Government, the Tasmanian Hospitality Association, the University of Tasmania and TAFE Colleges, Regional Tourism Organisations, Business Events Tasmania, our air and sea carriers, representative sectoral organisations and many others.

The Tasmanian Government and TICT must provide leadership, commitment and accountability on behalf of the state’s public and private sectors for the implementation of this agreement.

More Tasmanian’s depend on tourism for their employment than any other Australian State or Territory.

In 2014-15, visitors to Tasmania spent almost $1.89 billion during their stay. This money was spent throughout the state in local communities, and sustained many small businesses that directly serve visitors e.g. retail outlets, petrol stations, hotels, cafes, pharmacies, bakeries, as well as businesses that service them e.g. tradespeople, laundry services, catering services, food and beverage producers.

Currently, tourism contributes around $2.3 billion a year to the Tasmanian economy, or 9 per cent of Gross State Product. It directly provides around 15,000 local jobs in tourism, hospitality and connected industries, such as retail, accommodation, transport, pubs and bars, education and training, cafes, restaurants, tour operator and cultural services.

Tourism also supports a further 22,500 jobs indirectly across industry sectors as broad as the construction, manufacturing, financial and insurance, education and training, health care, agriculture, forestry and fishing, and professional services sectors.

1 Tasmanian Visitor Survey 2014-15, Tourism Tasmania
2 State Tourism Satellite Accounts 2013-14, Tourism Research Australia
Visitation to Tasmania

In 2014-15, Tasmania attracted 1.15 million visitors. This was an 8 per cent increase on the previous year and set a new record for visitor numbers to the State.

Tasmania’s visitor economy is dominated by Australian travellers. About 86 per cent of all visitors to Tasmania in 2014-15 came from mainland Australia, with the three source markets of Melbourne, Sydney and South East Queensland representing the mainstay of the state’s visitor economy. While this is unlikely to change, the performance of individual state economies, improvements in access, and levels of consumer confidence in each source market are likely to influence future visitor growth and market opportunities.

People visit Tasmania for many reasons. This includes coming to Tasmania for a holiday, to visit friends and relatives who live here (VFR), for business or employment purposes, to study, or for a specific business, cultural or sporting event.

Looking ahead, the most current national tourism forecast suggests the rate of domestic travel growth in Australia over the next five years will be low and largely driven by business and VFR travel rather than by Australians taking domestic holidays.

On the international front, the current forecast for international tourism to Australia is healthier with predictions of around 4.5 per cent average annual growth in international visitors to Australia over the next five years. Asian economies are also expected to deliver even higher levels of visitor growth during the next five years.

Tasmania’s recent success at attracting a rapidly growing number of visitors from greater China, while also retaining visitors from its traditional UK and US source markets, offers great potential to increase international visitor numbers to the state over the coming years.

Tasmania has outperformed domestic and international visitation forecasts over the past five years, and will achieve the 1.5 million visitor target if this rate of visitor growth can be sustained for the next five years. The challenge is for all elements of Tasmania’s visitor mix to grow strongly – holiday, business, VFR, event and the education travel sectors.

The opportunity is there for all elements of the visitor economy to align to the Tasmanian brand to ensure a consistent approach to Tasmania’s market position as Australia’s preferred place to visit, live, work and invest.

1 Tasmanian Visitor Survey 2014-15, Tourism Tasmania
2 State Tourism Satellite Accounts 2013-14, Tourism Research Australia
3 Tasmanian Visitor Survey for year ending June 2015, Tourism Tasmania
4 Tourism Forecasts – Autumn 2014, Tourism Research Australia
Visitors spend money throughout the state, regardless of their purpose for coming here. This benefits the Tasmanian economy in many ways – through the increased demand for services, goods, capital investment and labour - which in turn benefits many local industry sectors, including direct tourism services.

More visitors spending in our communities stimulates the creation of new businesses, they sustain existing businesses, create jobs and population growth, and they support cultural endeavours, the arts and creative industries.

**T21 – The Tasmanian Visitor Economy Strategy** brings this together by acknowledging that there are many reasons to visit Tasmania and there are many individuals, businesses and organisations - not just tourism and hospitality agencies and businesses - involved in attracting visitors.

Tasmania’s brand provides significant opportunity to continue to attract more visitors to reach our target of 1.5 million visitors annually by 2020. Tasmania’s great strength is the authenticity of place and our people – the extraordinary natural environment, capacity to generate outstanding produce, the island’s ancient aboriginal culture, its unrivalled colonial and industrial heritage, and the vibrant contemporary arts and cultural sector.

Our brand must be fostered, promoted, leveraged and protected through strategic investment, creative marketing, events and partnerships across industry sectors.

**T21 – The Tasmanian Visitor Economy Strategy** will bring industry and government focus to our competitive strengths that drive the bulk of visitation to the state now, and offer the potential for further sustainable growth.

We commit to developing these competitive strengths through targeted government and private sector support to encourage further investment and innovation.

Tasmania’s globally renowned natural environment is one of the state’s most valuable assets and underpins the state’s reputation as a must-visit destination. Our World Heritage Wilderness, National Parks, coastal and aquatic experiences and unique wildlife are fundamental drivers of visitation. Our nature-based and eco-tourism experiences connect visitors with these assets and also drive visitation into our regional areas.

From the enduring cultural heritage of one of the world’s oldest continuous civilizations to Tasmania’s early European heritage and a burgeoning contemporary arts and creative industries, Tasmania’s culture defines the island and its people. A strong and vibrant culture is at the heart of any visitor economy.

Tasmania’s reputation for high quality produce is recognised globally. Farm gate and agri-tourism experiences highlight our strength in the production of wine, whisky, cider and beer, along with our agriculture and aquaculture industries. These elements contribute strongly to the Tasmanian brand. With international research showing food and beverage to be a key factor in people’s travel decisions, Tasmania is well positioned to capitalise on this through its unique combination of people, produce, place and proximity.

**Sport and recreation** drives visitation to Tasmania through our calendar of major sporting events, the State’s capacity to host successful national carnivals/championships across a variety of sports, and the broad appeal of the state’s spectacular natural environment as the setting for land and sea based activities. Our natural
advantages generate keen interest among visitors in a range of individual pursuits, for example walking, golf, cycling, fishing, sailing and other recreation-based tourism experiences.

**Travel for business** is an important component of the visitor market, and a market segment offering potential for future growth in Tasmania. Strong business and investment will underpin business travel, which is less seasonal than leisure travel, and generally represents higher-yielding visitor spending.

Technology is changing how people work, live and play and innovative new services within the sharing economy like Uber and AirBnB are emerging and consumers are relishing the choice.

**Business events** are also a lucrative visitor segment for the state as they deliver high yielding outcomes, as well as contribute to our knowledge, particularly in sectors aligned to the strengths of our economy and our community. Business events also foster greater destination awareness and the likelihood of return visitation by delegates.

**Interstate and international students** studying in Tasmania provide an incentive for their relatives and friends to come and experience the state, and this in turn leads to increased word-of-mouth endorsement. International students also inject vibrancy to destinations and foster greater community awareness of cultural diversity.

The Tasmanian Government’s partnership with the University of Tasmania identifies long-term targets for access and attainment, economic impact, internationalisation, modernising our economy and revitalising our regions.

Industry and government agencies will work with education providers to grow the share of international students living and studying in Tasmania through partnerships and strategic alignment of marketing, public relations and advocacy activities.

Tasmania’s rich and growing calendar of events provides an opportunity to create compelling reasons to visit our state. The opportunity to grow this sector through strategic investment in events and marketing that leverage Tasmania’s considerable competitive strengths as an outstanding destination for cultural, food and beverage, sport and recreational events, requires closer cooperation between event organisers, government, industry and local communities.

As an island economy many sectors of Tasmanian industry rely upon visitation for growth, and a growing visitor economy with improved access and better visitor infrastructure enhances the desirability and opportunity to visit the state.

**What 1.5 million visitors a year means for Tasmania:**

- Around $2.5 billion from interstate and overseas visitors spent on accommodation, attractions, food and beverages, tours, retail goods, petrol and other goods and services every year throughout Tasmania’s regions, cities and communities^5^
- An estimated 20,000 direct tourism jobs on offer in Tasmania^6^
- The construction, staffing and provisioning of more than 1200 new hotel rooms in Tasmania to accommodate the extra visitors coming to the state^7^
- More flights and around 700,000 additional seats between Tasmania and the mainland/overseas^8^

---

^5^ based on Tourism Tasmania’s Tasmanian Visitor Survey figures for year ending December 2014

^6^ based on Tourism Research Australia’s Satellite Account employment figures for Tasmania 2013-14

^7^ based on Hobart Accommodation Study, BDA Marketing Planning 2014

^8^ Tasmanian Government Access 2020 Plan, October 2015
Our Priorities

Delivery of the T21 vision and visitation target requires a coordinated and collaborative approach across government and industry.

To guide the growth and development of Tasmania’s visitor economy, T21 will focus on four strategic priorities:

- Generate more demand for travel to Tasmania
- Grow Tasmania’s air and sea access capacity
- Invest in quality visitor infrastructure
- Building capability, capacity and community

PRIORITY 1: Generate more demand for travel to Tasmania

Tasmania’s reputation and consumer awareness of what we offer as a destination fuels visitor demand.

Tasmania is recognised as a highly desirable and outstanding global destination. In 2014, Lonely Planet named Tasmania the fourth best region in the world to visit in 2015, while Tasmanian operators won 10 of 29 categories at the 2014 Qantas Australian Tourism Awards.

Tasmania needs to grow its share of domestic and international visitors travelling in Australia. This means generating more demand for leisure and other travel to Tasmania to exceed current forecasts for growth.

This priority is fundamentally about marketing Tasmania effectively, to create a growing appeal for Tasmania, a desire or reason to visit, and the means for people to purchase their trip and travel here.

With word-of-mouth and third party endorsement exploding through social media and digital communication, every Tasmanian is an advocate for our state. Harnessing the passion of Tasmanians plays an important role in creating great visitor experiences and stimulating more demand for travel here.

Actions

What government will do

- Invest in market research, consumer insights and business intelligence to inform and guide Tourism Tasmania’s and partner marketing programs
- Through Tasmania’s brand, connect people culturally and emotionally to Tasmania through domestic and international marketing programs
- Invest in strategic marketing partnerships with domestic and international travel partners (travel agents, wholesalers, air and sea carriers)
- Collaborate with Tourism Australia to promote Tasmania’s experience strengths, as a premium travel destination in Australia
- Implement an Events Strategy that attracts visitors and showcases Tasmania’s appeal as a destination
- Open Tasmania’s national parks and reserves to environmentally sustainable and sensitive commercial tourism investment through the Expressions of Interest process to create new experiences

What industry will do

- Support and foster the Tasmanian tourism brand and a coordinated strategic approach to destination marketing at an industry, local and regional level
- Develop and invest in innovative visitor infrastructure
- Develop and support events and activities that underpin the Tasmanian brand, and provide fresh content for marketing campaigns and activities
- Encourage a consistent, singular destination voice to interstate and international markets
What we will do together

• Support the state’s regional tourism organisations to promote the distinct characteristics, products and experiences of each region within the Tasmania offering
• Support the development of new visitor infrastructure and experiences in Tasmania to stimulate visitor demand
• Identify priorities for the growth and management of nature-based and eco-tourism within Tasmania’s national parks and reserves

Supporting information

• Tourism Tasmania Corporate Plan
• Tasmanian Government Events Strategy 2015 – 2020
• Parks 21 Agreement
• Tourism Australia’s Tourism 2020 Strategy

PRIORITY 2:
Grow air and sea access capacity

Access is a critical element of the Tasmanian visitor economy. Tasmania’s recent growth in visitor numbers has been supported by increased air capacity and more visitors travelling to Tasmania on the Spirits of Tasmania service.

As an island, the supply of adequate air and sea services connecting Tasmania to the Australian mainland and the world is crucial for the growth and development of its economy and achieving the vision of 1.5 million visitors a year.

A new strategic outlook for aviation and access has been developed to ensure that air and sea access to and from Tasmania is aligned to the T21 vision. Access 2020 is a plan that focusses on year-round access solutions with domestic airline partners as well as securing a small number of direct international flights. The plan also acknowledges the work of TT-Line to build passenger numbers on the Spirits of Tasmania through increased day sailings and a major refurbishment.

Cruise ships also present Tasmania with a long-term opportunity through increased shore excursions, overnight stays, fly-cruise connections and seasonally-based port and ship provisioning solutions.

Actions

What government will do

• Invest in commercial partnerships and cooperative marketing programs with domestic and international air carriers to grow capacity and demand
• Pursue direct international air services to Hobart
• Grow air freight capacity for time sensitive premium Tasmanian products and support investment in additional air services to Tasmania
• Implement initiatives within the MOU between Tourism Tasmania and TT-Line to collaborate in the sharing of research and cooperative marketing activities

What industry will do

• Advocate within the Tasmanian community to promote the critical role access plays in the economic and social wellbeing of the state
• Support initiatives to provide greater access capacity to Tasmania through infrastructure investment, marketing and partnership activities with carriers

What we will do together

• Create a whole of government and industry approach to aviation and access development as a state-wide economic development priority
• Develop a cross-agency and industry Access Working Group to oversight implementation of Access 2020
• Work with TT-Line to implement their growth plans for the Spirits of Tasmania
• Invest in marketing activities and infrastructure to encourage growth in cruise ship arrivals and expedition cruising in Tasmania
• Develop in-state transport solutions and infrastructure for a growing visitor economy and enhance the visitor experience

Supporting information
• Tasmanian Government Access 2020 Strategy
• Department of State Growth Corporate Plan

PRIORITY 3: Invest in quality visitor infrastructure

Investment in private and public infrastructure is essential if we are to grow the visitor economy. To achieve 1.5 million visitors a year by 2020 requires the ongoing development of exciting new visitor experiences to drive interest in Tasmania, stimulate visitor demand and encourage travel within the state.

While Hobart is expected to grow significantly as a visitor destination through greater accommodation capacity and more business travel and events, it will be important to ensure visitors move beyond the capital city and travel to Tasmania’s regional areas.

Creating a conducive environment for private investment attraction, facilitation and implementation, which includes the right environment for sustainable development in natural areas, is a key priority. Strategic investment in public infrastructure that enhances the visitor experience and encourages travel to and within regional areas is also critical.

Tasmania must provide better touring facilities and amenities, access to its stunning natural areas, and more rooms to accommodate the extra visitors needed to reach the T21 vision. Tasmania also needs better and more facilities like jetties and wharves for water-based tourism ventures, visitor-engaging airports and ports, better and safer tourism roads and world-class facilities for access to its parks and World Heritage Areas.

Tourism operators must continue to invest in their businesses so they can offer visitors relevant, contemporary and quality visitor services and experiences throughout the state.

Private investment in new and existing visitor services, experiences and infrastructure, will be crucial to Tasmania’s ongoing economic performance and the jobs that flow from a strong and healthy visitor economy. This includes creating the right environment and confidence for businesses to invest in new services, experiences and visitor infrastructure, as well as employing more Tasmanians.
We’ve seen the power of new innovative visitor products, experiences and infrastructure over recent years. The challenge is to foster a bold, brave and innovative culture, and continue the momentum created by places like MONA and Saffire, so that Tasmania is ready to support the next generation of world leading visitor experiences and infrastructure.

**Actions**

**What government will do**
- Maintain the Unsolicited Proposal Framework for new, innovative and unique ideas and investment by the private sector
- Invest in priority tourism infrastructure and products
- Invest in public infrastructure and transport systems that enhance visitor experiences
- Complete the Cape Raoul stage of the Three Capes Track project
- Roll out the tourism WiFi network

**What industry will do**
- Identify and advocate for priority state-wide visitor infrastructure and investment opportunities
- Support the Office of the Coordinator General to attract and facilitate tourism investment
- Commit to developing world-leading, sensitive, low-impact commercial tourism activity within Tasmania’s national parks, reserves and World Heritage Areas, that respects and elevates the environmental and cultural significance of these areas
- Develop new and support existing visitor infrastructure
- Embrace the sharing economy and new technology platforms to improve access to services for the visitor
- Retain a commitment to strong quality assurance and the highest level of voluntary industry accreditation in the Australian tourism industry

**What we will do together**
- State and local government to collaborate and participate in regional economic development planning including prioritisation of tourism infrastructure and product development projects, in consultation with Regional Tourism Organisations
- Develop and implement a Tasmanian Visitor Engagement Strategy
- Develop strategies and infrastructure to engage the drive touring market to maximise length of stay and regional dispersal
- Encourage the development of new experiences that complement Tasmania’s competitive strengths
- Adopt a demand-driven approach to investment in visitor infrastructure, in Tasmania’s National Parks, reserves and waterways

**Supporting information**
- Tasmanian Government Unsolicited Proposal Framework 2015
- Parks 21 Agreement
- Tasmanian Government Access 2020 Strategy
- Department of State Growth Corporate Plan

**PRIORITY 4: Building capability, capacity and community**

Tasmania has a welcoming culture. The friendliness and helpfulness of Tasmanians is a regular and frequent response from visitors about their Tasmanian travel experience.
In fact, around 88 per cent of visitors to Tasmania say they are either very satisfied or satisfied with the level of customer service during their visit9, and around 74 per cent of Tasmanian visitors surveyed between April and June 2015 said they recommended Tasmania to others upon their return home10. That ranked Tasmania as the most recommended Australian state or territory by past visitors.

These statistics represent a very solid platform for Tasmania, given the growing influence of word-of-mouth on the choices people make about preferred destinations to visit. However there is a need to further build the state’s reputation through ongoing commitment to quality assurance, enhancing the customer experience through a high quality workforce.

The perception is that this will also require the status of a career in tourism and hospitality be elevated beyond that of a part-time or temporary and transitional job.

**Actions**

**What government will do**

- Support and enable our industry associations, Regional Tourism Organisations, Business Events Tasmania and Brand Tasmania
- Undertake a workforce audit and align workforce development programs with the needs of industry
- Provide a regulatory framework for the sharing economy that’s fair and provides necessary protections, but does not ban progress

**What industry will do**

- Lead the delivery of quality assurance and customer experience programs across the visitor economy
- Encourage tourism and hospitality operators and local tourism associations to become ambassadors for their industry and the visitor economy
- Strengthen partnerships with education providers on outcome-focused tourism and hospitality industry training programs
- Support and work with education providers to embrace international students as active members of our community and long-term advocates for Tasmania
- Champion entrepreneurialism and foster innovation in the Tasmanian visitor economy

**What we will do together**

- Highlight the contribution and importance of the visitor economy throughout Tasmania’s communities
- Establish a clear understanding of the key responsibilities of state and local government, organisations and associations within the visitor economy
- Support Tasmanian businesses to deliver quality services for visitors through capability and capacity building programs
- Work with the University of Tasmania and the education and training sector to develop an approach to increasing international education in Tasmania
- Encourage a culture of excellence and quality across the Tasmanian visitor economy
- Attract and train the next generation of tourism, hospitality and events workers
- Implement visitor satisfaction and quality assurance strategies for Tasmania’s parks and reserves

**Supporting information**

- Tasmanian Hospitality Association Industry Strategic Plan 2012
- Tasmanian Government Events Strategy 2015 – 2020
- Regional Destination Management Plans and Action Plans
- Parks 21 Agreement
- Department of State Growth Corporate Plan

---

9 Tasmanian Visitor Survey for year ending June 2015, Tourism Tasmania
10 Tourism Info Monitor, June 2015 Quarter, Tourism Tasmania
Measuring Progress

In building our visitor economy, Tasmania looks beyond just visitor numbers to also measure what visitors are delivering to the Tasmanian community.

**T21 – The Tasmanian Visitor Economy Strategy** measures five key indicators of growth in the Tasmanian visitor economy and progress towards achieving annual visitor numbers to Tasmania of 1.5 million by 2020.

These are:

- **Volume** – the number of visitors coming to Tasmania
- **Expenditure** – how much visitors are spending in Tasmania
- **Employment** – how many jobs being created in Tasmania
- **Dispersal** – the regional share of all visitor nights spent in Tasmania
- **Satisfaction** – the quality of experience of our visitors

### Volume

Measuring how we are tracking towards our target of annual visitor numbers to Tasmania of 1.5 million by the year ending December 2020. Visitor Growth generates additional visitor spending, job creation and regional dispersal.

**Data source:** Tasmanian Visitor Survey, Tourism Tasmania

**Base line:** 1,068,000 visitors for YE 2014

**2020 goal:** 1,500,000 visitors for YE 2020

### Expenditure

How much our visitors are spending across the Tasmanian economy is a measure of the export value of the Tasmanian visitor economy. Increased visitor spending generates capital investment and employment growth.

**Data source:** Tasmanian Visitor Survey, Tourism Tasmania

**Base line:** $1.75 billion for YE 2014

**2020 goal:** $2.47 billion for YE 2020
Employment
How many direct and indirect jobs within the Tasmanian visitor economy measures growth in the tourism industry, capital investment, and its flow through the broader Tasmanian economy.
Date source: Tourism Satellite Account, Tourism Research Australia
Base line: 15,000 direct + 22,500 indirect for FY13/14
2020 goal: 20,000 direct + 30,000 indirect for FY20/21

Dispersal
Measuring the share of all visitor nights spent outside Hobart City is a practical measure of whether regional Tasmania is sharing in the visitor growth.
Data source: Tasmanian Visitor Survey, Tourism Tasmania
Base line: 66% of visitor nights in Tasmania were outside Hobart City for YE 2014
2020 goal: 66% of all visitor nights in Tasmania are outside Hobart City

Satisfaction
Measuring visitors’ level of satisfaction with their Tasmanian trip is a useful indicator of the extent to which the destination and the workforce have exceeded expectations. This is likely to result in more word of mouth endorsement and repeat visits.
Date source: Tasmanian Visitor Survey, Tourism Tasmania
Base line: 51% of visitors were very satisfied with customer service in YE 2014, and 29% were very satisfied with value for money
2020 goal: 60% and 35%
T21 – Governance

T21 identifies four strategic priorities and a series of actions underneath each to grow Tasmania’s visitor economy and attract 1.5 million annual visitors by 2020. Effective governance is essential to ensure:

- each of the identified actions is delivered
- key stakeholders continue to be engaged in the growth of the Tasmanian visitor economy
- overall progress is measured and monitored
- additional or evolved actions are identified to achieve T21’s objectives and vision.

Premier’s Visitor Economy Advisory Council

The Premier’s Visitor Economy Advisory Council will monitor overall progress on the key actions and agree new, strategic actions required to achieve the government’s vision of 1.5 million annual visitors to Tasmania by 2020. The Council will also engage with key stakeholders in the visitor economy to identify new opportunities for growth.

The Premier of Tasmania will chair the council.

Membership of the council will also include:

- Minister for State Growth (Deputy Chair)
- Chair, Tourism Industry Council Tasmania
- Chair, Tourism Tasmania
- Chair, Tasmanian Hospitality Association
- Secretary, Department of State Growth
- CEO, Tourism Tasmania
- Secretary, Department of Primary Industries, Parks, Water and the Environment.

The council will meet twice a year and issue public reports on progress against the T21 priorities after each of its meetings. One report will be presented to the annual Tasmanian Tourism Conference in May of each year and provide the previous calendar year’s results, while the second report will be made in December each year and will provide the previous financial year’s results.

T21 Steering Committee

The T21 Steering Committee will oversee and coordinate the delivery and reporting against the T21 actions by the relevant organisations. The committee will meet quarterly and will report on progress to the Advisory Council.

The CEO of Tourism Tasmania will chair the T21 Steering Committee.

Membership of the committee will include:

- Secretary, Department of State Growth
- Secretary, Department of Primary Industries, Parks, Water and the Environment
- General Manager, Parks and Wildlife Service
- Deputy Secretary Cultural and Tourism Development, Department of State Growth
- CEO, Tourism Industry Council Tasmania
- General Manager, Tasmanian Hospitality Association
- Director Operations and Planning, Tourism Tasmania.