

## A world-leading destination of choice

Tasmania is a place of wild and beautiful landscapes, a pristine natural environment, friendly people with a relaxed lifestyle, wonderful food and wine and a haunting history evoked by world-famous convict ruins. Tasmania is Australia's only island state and the most geographically diverse, with an extraordinary 48 per cent reserved as national parks and world heritage wilderness.

With record numbers of people travelling to Tasmania prior to Covid-19, the secret is out. Tasmania is fast becoming a must see and do destination for travellers from around the globe. The Tasmanian Government's vision remains for Tasmania to be a world-leading travel destination with a vibrant visitor economy supported by our tourism and hospitality industries. The government has committed to achieve this vision by delivering dedicated marketing activities, a plan to increase air and sea access, and by driving major investment in quality tourism infrastructure.

This vision is reinforced by strong and established businesses, a dynamic education sector, and a community that embraces visitors and all the benefits they bring to Tasmania. As Tasmania continues to out perform domestic and international visitation forecasts and deliver outstanding growth, now is an exciting time to invest in Tasmania's visitor economy.



Many opportunities exist for investment in the following:

- » built infrastructure such as hotels and other accommodation
- » leisure attractions
- » business events
- » heritage activities
- » gastronomic experiences
- » recreational and adventure activities
- » sensitive and appropriate tourism developments in Tasmania's wilderness world heritage areas, national parks, reserves and Crown land.

Tasmania is one of Australia's most affordable places to establish or expand a business. The state has a resourceful and resource-rich economy with a reputation for quality. Tasmania's compelling brand is strong and has a number of globally competitive advantages that are admired worldwide as being synonymous with excellence, purity and sustainability.

Tasmania's share of tourism employment is the highest in Australia and the overall contribution of tourism accounts for about 15 per cent of total Tasmanian employment. Tourism contributes about 9 per cent to Gross State Product.





## **Why Tasmania is the perfect tourist investment destination?**

Tasmania's greatest strength is the authenticity of place and people. It is for this reason that Tasmania has been voted third most welcoming region on Earth for two consecutive years by booking.com and its 232 million verified reviews. Tasmania was also awarded 2021 'Place Brand of the Year' at the City Nation Awards in London. In addition, at the 2019 Qantas Australian Tourism Awards, Tasmania won more medals than any other Australian state or territory, receiving seven gold, seven silver and three bronze medals.

Factors that resonate with our visitors are the state's extraordinary natural environment, capacity to generate outstanding produce, the island's ancient Aboriginal culture, its unrivalled colonial and industrial heritage, and vibrant contemporary arts, events and cultural sector. By developing these competitive strengths, through targeted government and private sector support, further investment and innovation will continue at pace.

Tasmania's globally renowned natural environment is one of the state's most valuable assets and underpins the 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 experiences alongside our world-famous beaches are incredible assets and are driving visitation to Tasmania's regional areas. Whether you enjoy kayaking on one of the many lakes in Tasmania's Southwest National Park, or prefer rafting down the Franklin River, whether you are after an adrenaline rush whilst riding on one of the many famous mountain bike trails all around the island or prefer a golf experience on one of our 65 courses of which several appear amongst the top-rated courses across the globe attracting visitors from all over. Tasmania has it all.

A recent international survey of Australia's target markets shows that high value travellers rank extraordinary nature and wildlife, safety, good food, wine and local cuisine, phenomenal coastlines and marine wildlife in their top four factors when choosing destinations. Tasmania's offering meets all of the high value traveller's needs in a compact island destination, which has great appeal for both short and long stay visitors.

Tasmania has a strong association with premium cool climate wines such as the likes of Bangor Wines, Frogmore Creek or the world's best sparkling by Arras to only name a few. In recent years the state has become known for its strength in premium beverage production including beer, cider, wine, whisky, gin and vodka. The awards do not stop with wine, as we claimed the world's best whisky in 2019 with Sullivans Cove, world's best vodka in 2018 with Hartshorn Distillery and in 2021 we claimed the world's best contemporary gin with Three Cuts Gin. With a reputation for quality now recognised, more distilleries are establishing a presence in Tasmania.

Tasmania's temperate climate, distinct seasons, clean water, reliable rainfall, clean air, and rich, fertile soils have seen the state develop a reputation for superior livestock, dairy and aquaculture. Alongside this good reputation is increasing recognition of the state's seafood and niche gourmet cooking products such as seeds, honey, ginseng, olives, nuts, berries and truffles. UNESCO's naming of Launceston as a City of Gastronomy in 2021 reinforces its premium quality and experiences across the state, such as the successful Agrarian kitchen, named best regional eatery in Australia in 2018.



## Tourism fundamentals

### Visitor numbers

Prior to Covid-19, Tasmania was attracting record numbers of visitors, encouraging them to stay longer and spend more. In the 12 months to December 2019:

- » 1.35 million people arrived on scheduled air and sea services (not including cruise ship visitors)
- » accounting for a total of 10.87 million nights
- » staying on average 8 nights
- » spending a record amount of \$2.54 billion up three per cent on the previous year
- » which equates to \$1 881 per individual visitor.

Tasmania showed great resilience over the course of the global pandemic. Even with international borders shut during most of 2020 and all of 2021, Tasmania showed record domestic visitor numbers in parts of 2021 that has set the state up for a successful recovery post pandemic. Domestic visitor numbers are expected to rise given Tasmania is a highly desirable visitor location amongst Australians.

Prior to Covid-19, Tasmania was experiencing strong growth from international markets, particularly from China, United States of America, Hong Kong, United Kingdom and New Zealand. Total International visitor numbers reached 282 900 in 2019. However, despite international visitation growing, Tasmania continues to hold strong brand equity among Australians, ensuring a stable and ongoing demand within the domestic market making Tasmania an ideal location to invest regardless of external, international factors given 85 per cent of visitors are from mainland Australia.

### Visitor spend

Providing an important economic stimulus to the Tasmanian community, visitors to Tasmania spent over \$2.54 billion on accommodation, attractions, tours, transport and other goods and services in the year to December 2019. On account of Covid-19, visitor numbers in the year to June 2021 dropped by 44 per cent, however, visitor spend only decreased by 27 per cent, demonstrating Tasmania's strong potential to attract local visitors and its potential to increase yield.<sup>1</sup>

### Accessibility

In the year ending September 2021:

- » approximately 82 per cent of visitors arrived by air
- » 18 per cent on the Spirit of Tasmania
- » of those arriving by air
- » 66 per cent landed at the Hobart Airport
- » 31 per cent at Launceston Airport.

During this period 1.8 million airline seats were provided on the five major flight routes to Tasmania<sup>2</sup> and is on trend to return to pre-Covid-19 levels of 4.8 million seats.

All major Australian airlines fly to Tasmania. Flights by Virgin Australia, Jetstar, and Rex complement Qantas services to increase the capacity and affordability of Tasmania as a travel destination.

1. Tasmanian Visitor Data, Tourism Tasmania, December 2021  
 2. Tourism Fast Facts, Tourism Tasmania, December 2021



Over the past decade prior to Covid-19, Tasmania had enjoyed a sustained trend increase in both seat and passenger numbers. Growth in airline seats in 2018-19 were at six per cent versus 0.1 per cent nationally.

The two Spirit of Tasmania ferries provide regular sea access between Devonport and Melbourne, departing most days of the year. The Spirit of Tasmania reported record performance in the year prior to the pandemic carrying 446 869 passengers. Sea access is important as visitors tend to stay longer and spend more when visiting via sea.

### **Accommodation pipeline**

With growing visitor numbers, a healthy hotel pipeline is critical. Accommodation demand continues to increase across the whole state, driving the need for further hotel developments. Tasmania and in particular Hobart as the main point of arrival are seeing strong seasonality and have led in the past to shortages particularly during the summer months.

The government has put in place grants to encourage new hotel developments across the state. Openings in Hobart of big international brands such as the Tasman (opened in December 2021), which is the first of The Luxury Collection by Marriot International, have raised the profile for Hobart and Tasmania recently and set the precedent of Tasmania as a luxurious brand and destination.

A growth in the luxury market is emphasized by future developments such as the Allure in Cape Raoul, which will help dispersal of visitors into regional areas.

### **The Tasmanian brand is supported by government**

Tasmania's brand awareness is reinforced by government at a national level through Tourism Australia, and at the state level through both Brand Tasmania and Tourism Tasmania. Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia. The organisation is active in around 30 markets with advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.

Tourism Tasmania conducts targeted promotions and marketing activities to promote Tasmania in our domestic and international markets, as well as helping to connect potential customers with Tasmanian businesses. These activities focus on the best visitor prospects for Tasmania and ensure Tourism Tasmania gets the best return on investment from its marketing effort and resources. Brand Tasmania is the first statutory place branding authority to be established in Australia. It works to maintain, strengthen and protect the Tasmania master brand in local, national and international markets.



## Tourism activities

Tasmania's natural advantages present opportunities for the development of world-leading tourism activities.

### Agri-tourism

Tasmania has an increasing offering in premium food and beverage related experiences. Agri-tourism operators are well positioned to capitalise on Tasmania's natural advantages and the opportunities that arise from increased agricultural output, higher visitation and a stronger brand.

### Convict sites

Tasmania's compelling convict heritage is officially recognised through its World Heritage listing. In July 2010, a total of 11 Australian convict sites were inscribed on the UNESCO world heritage list, five of which are found in Tasmania. The sites are recognised as "the best surviving examples of large-scale convict transportation and the colonial expansion of European powers through the presence and labour of convicts". The Tasmanian sites include the Port Arthur Historic Site, which won best tourist attraction at the Australian Tourism Awards for two consecutive years, as well as the Coal Mines Historic Site on the Tasman Peninsula, the Cascades Female Factory in Hobart, Darlington Probation Station on the east coast's Maria Island and Woolmer's and Brickendon Estates near Launceston in northern Tasmania.

## Culture, festivals and art

Tasmania has a very distinct culture formed by distance, environment and history. From small artist-run spaces to cutting-edge and contemporary museums and art galleries, Tasmania offers a large variety in art experiences, that draw art lovers and the curious from around the world with MONA – Hobart's Museum of Old and New Art a prime example.

Tasmania hosts international, national and local events throughout the year and there is always a market on where you will find locally produced arts and craft, which give visitors the opportunity to chat with locals.

Tasmania offers an array of festivals including Dark Mofo, the Taste of Tasmania or the Wooden Boat Festival to only name a few of the unique Tasmanian experiences.

### Cycling

Tasmania has developed a global reputation for superb mountain biking fuelled by an expanding network of world-class trails through the wilderness and the support of towns dedicated to mountain bikers. Road cycling in Tasmania is also growing with events like the Cradle Mountain Peaks Challenge adding to the state's reputation as a cycling destination.

The growth of these activities demonstrate the opportunity for development of outdoor and adventure attractions in and around Tasmania's National Parks and Wilderness. They also present significant opportunities for complementary services and activities such as accommodation, hospitality, and agri-tourism.



### National Parks and wilderness

Tasmania's national parks cover unspoiled habitats and ecosystems with some plants and animals found nowhere else on Earth. Tasmania's protected national parks and reserves make up around 48 per cent of the state, most of which are within easy reach of major cities and other populated areas.

Many of the state's well known iconic locations are situated in or near national parks, including: Cradle Mountain in Cradle Mountain-Lake St Clair National Park in the Central Highlands; Wineglass Bay in Freycinet National Park on the east coast; the Franklin River in the Gordon-Franklin Wild Rivers National Park on the west coast; and the Port Arthur Historic Site near the Tasman National Park in south eastern Tasmania. The state also has significant and beautiful underwater marine environments to be explored.



### Golf

With scenic views guaranteed and some of the country's best and quirkiest courses Tasmania is a great place to swing a club. Tasmania is home to three of the World's Top 100 Golf Courses as ranked by Golf Digest – Cape Wickham, Barnbougle Dunes and Barnbougle Lost Farm. All traditional links courses these courses have been built in the Scottish style with fairways overlooking Bass Strait. Also ranked as Australia's top three public golf courses they reflect the opportunity of using Tasmania's breathtaking landscapes to develop world renowned attractions.

### World Heritage Areas

Tasmania's unique wilderness and five of Tasmania's historic convict sites are listed by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) as worthy of World Heritage Listing in recognition of their outstanding natural or cultural importance to the common heritage of humanity.

#### *Tasmanian wilderness world heritage area*

The Tasmanian Wilderness World Heritage Area consists of a chain of six national parks and a number of reserves and conservation areas. This area encompasses around 1.4 million hectares – almost a fifth of the total area of the state.

# Tasmania's Tourism Regions

## Hobart and the south

Southern Tasmania combines heritage charm, nature-based attractions, cultural diversity and exquisite food and beverages. Hobart is the state's capital and one of the most recognised places in Tasmania with over 77 per cent of all guests to Tasmania visiting Hobart and surrounding areas during their stay.

Over the past two years prior to Covid-19, Hobart and its surrounding areas have experienced over five per cent growth in overnight international and interstate visitors. Many visitors consider an overnight stay in Hobart an essential part of their trip to Tasmania with nearly 80 per cent of all visitors to the state spending at least one night in Hobart.

Hobart is home to the Salamanca Markets, the Museum of Old and New Art (MONA) and the Tasmanian Museum and Art Gallery and the city also hosts regular Australian Football League and international cricket matches.

The region is also home to Bruny Island, Port Arthur, the Coal River Valley wineries, the Huon and Derwent Valleys, the historic town of Richmond and the Tasman Peninsula.

## East coast

Tourism on the east coast is growing. Visitor data to December 2019 reports that 26 per cent of international and interstate visitors spent a night on the East Coast. Tasmania's East Coast offers long, white beaches, clear waters and secluded coastlines that are perfect for walking, kayaking, diving and sea cruises. The region includes Freycinet National Park, home to the multi-award winning Saffire Freycinet lodge, Bay of Fires coastal area and Maria Island National Park that features the multi-award-winning Maria Island walk.

The Great Eastern Drive follows one of the most dramatic and beautiful coastlines in Australia. With its spectacular national parks, wildlife and many maritime experiences, this route takes you through a temperate natural paradise. The recent development of multiple world class mountain bike trails has contributed to increased visitation in the region.

## Launceston, Tamar and the north

Launceston, Tasmania's second-largest city, is home to many of the state's best events and attractions such as Festivale, the Cataract Gorge and Queen Victoria Museum and Art Gallery as well as some of Australia's best restaurants, hence deserving the UNESCO assigned title as a City of Gastronomy.

The region's historic towns of Evandale, Longford, Campbell Town and Ross preserve the architecture of the 19th century and offer many niche tourism products. Within close distance is the first wine region that was established in Tasmania, the Tamar Valley.

This region offers distinct, premium quality, cool climate wineries and vineyards. Other attractions in the region include Australia's biggest annual craft fair held in the country town of Deloraine, the agricultural showcase Agfest, North East Rail Trail and the world-famous Barnbougle Dunes and Barnbougle Lost Farm Golf Courses.

Almost 44 per cent of guests to Tasmania visit Launceston, and 34 per cent stayed overnight. Growth in overnight stays had increased prior to Covid-19 and is anticipated to continue to grow with the Launceston Airport upgrade, hotel pipeline projects and an array of other building developments under consideration.

## North-west and west coast

With access via both air and sea, this area is home to some of Tasmania's best-known natural attractions, including the world heritage Franklin and Gordon Rivers, Cradle Mountain, the Tarkine – Australia's largest temperate rainforest, the Abt Railway and the roaring surf of Marrawah.

The region includes the cities of Devonport, the home port of the Spirit of Tasmania passenger, freight and transport ferries, and Burnie with the coastal communities of Penguin, Wynyard, Stanley, Strahan and King Island, as well as the hinterland towns of Latrobe, Queenstown and Sheffield. The increased capacity on two new purpose-built Spirit of Tasmania ships in coming years will enable greater direct access and visitation to the region.

The area produces some of the state's finest cheeses, chocolates and farm produce, as part of the Cradle to Coast Tasting Trail tourism experience. The Tasmanian and Australian Governments are investing over \$80 million as part of the Cradle Valley Tourism Development Plan. This will increase visitor numbers by approximately 40 000 per year and result in an additional \$14.4 million in visitor expenditure, delivering a strong, positive impact on the wider regional economy of the Cradle Coast.





## Explore the opportunities

The Office of the Coordinator-General is Tasmania's principal entity to attract and support investment in the state. It provides free confidential services and professional advice to investors, including:

- » connections with local industry associations and government departments
- » information on business opportunities, investment regulations and government assistance
- » insights on business costs, skills availability, taxation and research opportunities
- » expert advice on Tasmania's industry capabilities and strengths
- » site visits to identify suitable locations in Tasmania for your business
- » links with potential joint-venture partners
- » information on industry strategies.

## Useful contacts

### Business Events Tasmania

GPO Box 237 Hobart TAS 7001 Australia  
Phone: +61 3 6231 1366  
Email: [mail@betasmania.com](mailto:mail@betasmania.com)  
Web: [betasmania.com.au](http://betasmania.com.au)

### Cradle Coast Authority (CCA)

PO Box 338 Burnie TAS 7320 Australia  
Phone: +61 3 6433 8400  
Email: [admin@cradlecoast.com](mailto:admin@cradlecoast.com)  
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### Destination Southern Tasmania (DST)

PO Box 184 Battery Point TAS 7004 Australia  
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### East Coast Regional Tourism (ECRT)

PO Box 115 Bicheno 7215 Australia  
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### Local Government Association of Tasmania

GPO Box 1521 Hobart TAS 7001 Australia  
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### Northern Tasmania Development

PO Box 603 Launceston TAS 7250 Australia  
Phone: +61 400 338 410  
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### Tourism Industry Council Tasmania

GPO Box 2158 Hobart TAS 7001 Australia  
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### Tourism Tasmania

GPO Box 399 Hobart TAS 7001 Australia  
Phone: +61 3 6165 5334  
Email: [reception@tourism.tas.gov.au](mailto:reception@tourism.tas.gov.au)  
Web: [discovertasmania.com.au](http://discovertasmania.com.au) (Consumer travel)  
[tourismtasmania.com.au](http://tourismtasmania.com.au) (Corporate)

### Visit Northern Tasmania

PO Box 582 Launceston TAS 7250 Australia  
Phone: +61 3 6380 6099  
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