



West by North West acknowledges the ancient history of the Tasmanian Aboriginal people as the First People of lutruwita/Tasmania and honours the Tasmanian Aboriginal Community, men and women, past and present. We thank them for caring for the land, sea and waterways that we showcase and celebrate as a tourism industry; and where we all now live, work and play.







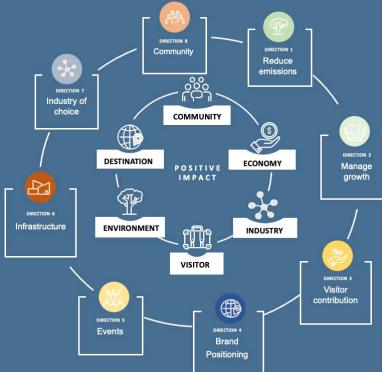
in collaboration with our region's tourism industry. It provides a 3-year strategic horizon, with actions and KPIs to be reviewed annually. Many have contributed to its creation, building on our previous strategies clearly and powerfully into the statewide 2030 Visitor Economy Strategy.

Now, as our region's tourism industry evolves with the opportunities before it, so too should this strategy – an evergrowing document, genuinely owned and led by the community it serves.

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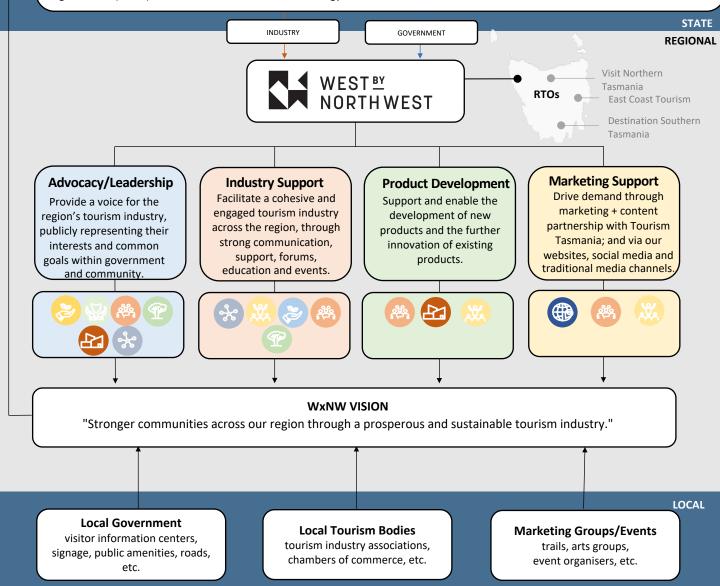
OUR ROLE IN TOURISM

- WxNW is one of four regional tourism organisations (RTOs), each funded by the Tasmanian government to work with the tourism industry at regional level; and with government at all levels. We are the connectors for industry to state government and agencies.
- Our work is viewed through 4 x strategic pillars, that shape our day-to-day
 operations and regional objectives. Marketing is about demand-generation,
 whereas Industry Support and Product Development are focused on the
 supply-side of our industry. Advocacy is a function of leadership.
- As per this diagram, the 2030 strategy is the key focus for both Government and Industry bodies to deliver. The strategy is a plan for growth - and a plan to manage growth sustainably.
- We as an RTO will feed directly into the 2030 strategy's 8 key directions by working with government and industry bodies to grow and manage our visitor economy.

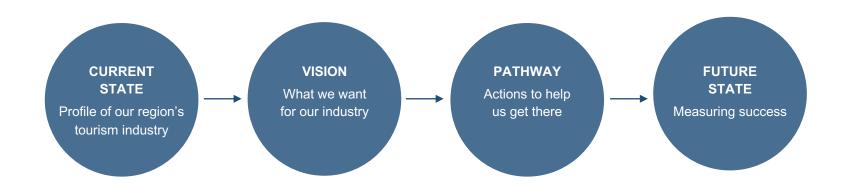


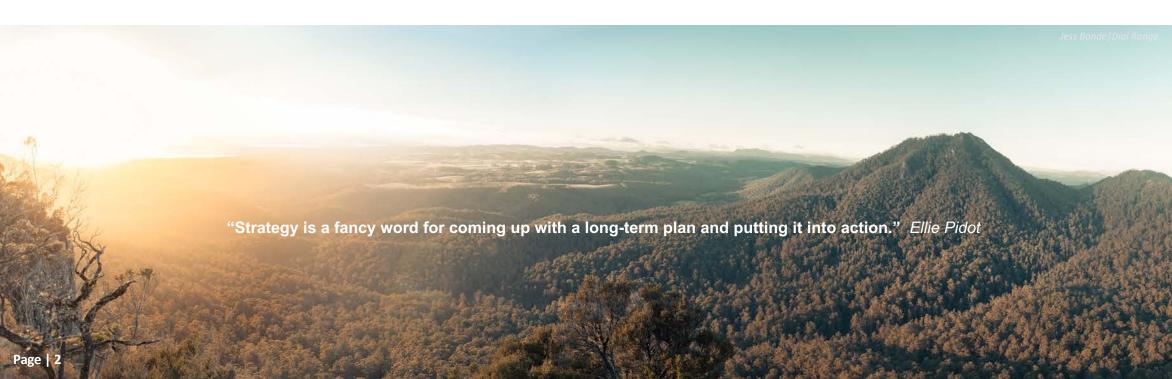
2030 VISITOR ECONOMY STRATEGY TASMANIA

The <u>T21</u> is the partnership between Tasmanian Tourism Industry and the Tasmanian Government. It sets the direction for the visitor economy through the <u>2030 Visitor Economy Strategy for Tasmania</u>. T21 officially comprises the TICT and THA on behalf of industry; and several govt. agencies and departments who report to the Premier's Visitor Economy Advisory Council (PVEAC). The 4 regional tourism organisation (RTO's) contribute to deliver the 2030 strategy.



REGIONAL TOURISM STRATEGY





REGIONAL TOURISM STRATEGY



This **SWOT Analysis** is intended to capture the primary considerations for our region. Obviously, it cannot be considered exhaustive, but it hopefully paints a useful picture of the key strengths, weaknesses, opportunities and strengths that currently face our region's tourism industry. It has been (and will be) reviewed at least annually.

STRENGTHS

Some of the world's purest air + rain

International visitor icons inc. Cradle Mountain, Stanley, Strahan, KI golf World's equal-highest rated wilderness world heritage area

Vibrant agricultural district – Tasmania's food-bowl

Better highlight our space, openness and freshness

Tasting Trail

Some of the world's best golf courses

Access: 3 x airports, Spirit of Tas + established cruise ship port

Passionate arts community

New MTB trails

'Small-town' character and hospitality

WEAKNESSES

Geographic isolation makes travel time a potential barrier
Cost of inbound access via air + sea, compared to LTN + HBT
Not enough truly unique and world-class tourism offerings (critical mass)
Fragmented region (geographically, 9 councils, LTAs, etc.)
Cluttered marketing (many websites, brochures, groups, etc.)
Community attitude towards tourism/hospitality as career pathway

OPPORTUNITIES

Geographic isolation increasingly appealing – regional tourism on the rise Public investment in *Cradle Master-Plan, Next Iconic Walk,* Dismal Swamp, etc. Public investment in MTB + walks infrastructure across the region Improved storytelling of the region's rich indigenous heritage Grow status of adventure tourism (west), agritourism (NW) and golf (KI) Tourism Tasmania's aspiration to be world-class drive touring destination Tourism Tasmania's 'off-season' campaign, improving year-round viability Grow conference + event visitation, leveraging 'newness' of *paranaple* Increased capacity of new Spirit ferries
Leverage new renewables projects to tell story of region's eco-pursuits

THREATS

Current global economic instability

Traditionally low demand over winter + shoulder seasons

The cost of inbound access remains high, or increases

Failure to attract skilled tourism + hospitality workers

Failure to improve clustered approach to marketing across region

Potential for renewables projects to have visual impact on landscape

Ability for large renewables projects to deplete tourism workforce supply

SUPPLY

Approx. 840 tourism businesses operate across the region in the form of accommodation (45%), attractions (19%), tours, transport, events, dining + info services. This does not include Airbnb, which fluctuates around 1,600 listings. There are three airports, one cruise port and the TT-Line ferry port.

DEMAND

Pre-covid, our region welcomed over 560,700 visitors annually, equating to 2.2mil visitor nights.

STRUCTURE

Populatio
4,263
8,383
1,617
14,695
20,497
23,360
26,970
12,962
6,807
119,554

Local Tourism Groups

Destination West Coast
Circular Head Tourism Inc.
King Island Tourism Inc.
Business North West | Tourism
Caves to Canyon Tourist Association
Mersey Valley Tourism Group

Visitor Information Centres

Yellow i

Devonport, Sheffield, Ulverstone, Wynyard, Strahan, Smithton White i

Shearwater, Latrobe, Currie, Cradle Mountain, Penguin, Stanley & Queenstown



The 2030 Visitor Economy Strategy pursues a 2030 horizon, whereas this regional tourism 'sub-strategy' pursues a shorter 3-year horizon (to 2025). It provides a vision against each strategic pillar and each of our sub-regions*; all contributing to an overarching WxNW vision for *stronger* communities across our region through a sustainable tourism industry.

What does this mean in practical terms? We review our position in October 2025 against this collective set of visions. We also work towards annual KPIs against each strategic pillar to evaluate our progress.

These regional visions are useful when interpreting and delivering on the statewide 2030 Visitor Economy Strategy, allowing us to focus on elements that are of particular relevance to our region.

The 2030 Visitor Economy Strategy core principle is Positive Impact Tourism: ensuring the visitor economy provides benefits beyond the tourism industry to the broader Tasmanian community; and that any tourism impact is objectively positive.



VISION by STRATEGIC PILLAR

Advocacy/Leadership: Our communities understand and appreciate the value of tourism – sharing the best parts of living in the region with our visitors through stories, experiences and great service.

Industry Support: Our industry is engaged and cohesive, positively contributing to our regional community and focused on delivering quality experiences aligned to the region's strengths.

Product Development: With many new and exciting tourism offerings, our region is no longer seen as 'a long way from Hobart', but instead a destination that must be visited to experience the best of Tasmania.

Marketing: Our region's destination marketing is collaborative (focusing more on the visitor journey than municipal boundaries) and powerfully aligned with Tourism Tasmania's work to leverage the state's significant investment in destination marketing.

VISION by SUB-REGION

WEST COAST

To be recognised as Tasmania's wilderness adventure-tourism hub, with experiences ranging from soft to hard adventure experiences delivered by a professional and passionate local tourism industry.

NORTH WEST

To be Australia's preeminent agritourism destination, embracing, celebrating and sharing our rich agriculture and iconic wilderness; as a truly *unified* region of passionate tourism professionals.

KING ISLAND

To be a bucket-list destination for those seeking indulgent escapes from the modern world; and for golfers seeking the *holy grail* – all delivered as a well coordinated onisland visitor experience.

VISION by REGION

Stronger communities across our region through a sustainable tourism industry.

*Although it would be convenient to treat these sub-regions together as one destination with a single vision, <u>a market study we</u> conducted in 2020 revealed that visitors view these three sub-regions as distinct destinations with unique characteristics.





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

We also advocate back the other way, providing a voice for government on tourism matters, to our region's tourism industry and our local communities.

Acknowledging TICT as the *state level* advocate for the tourism industry, the RTO will work closely with TICT to advocate *specifically on behalf of its region*. However, unlike TICT, our advocacy cannot extend to political lobbying, as we are a government-funded organisation and therefore must remain apolitical.

What we WILL do

Jess Bonde | Julius River, Tarkine

- Reflect regional sentiment on state level projects
- Seek action on access issues (air, sea, roads)
- Provide regional context to TICT for their lobbying
- Support emergency response comms to tourism industry
- Represent industry via media + community forums
- Provide letters of support, where appropriate
- Maintain a productive working format with our 9 councils
- Inform positive community mindset towards tourism, thereby attracting staff, investors and entrepreneurs

What we WON'T do

- Political lobbying (this is the role of TICT)
- Unreasonably favour one LGA over others
- Provide letters of support to all who ask
- Publicly comment on matters unrelated to tourism

PRIORITY INITIATIVES | 2023-2024

- **Skills and Training**: Support 2030 to attract and develop talent into our region's tourism industry.
- Carbon Neutral: Support 2030 to reduce carbon emissions and improve sustainability beyond carbon.
- Inclusive Tourism: Work with government and industry to grow awareness of inclusive tourism.
- Visitor Engagement Model: Support 2030 in developing a contemporary model of visitor engagement, from marketing and booking, to onground experiences inc. visitor info. servicing.
- **Visitor Access**: Advocate for improved air and sea access to our region; and for improved road access (hire cars, public transport, tour operators, etc.).
- **King Island Airport**: Advocate for required upgrades to the King Island airport and runway.
- Major Tourism Projects: Provide a voice for our region's industry through the Cradle Mountain Experience Visitor Master Plan, Next Iconic Walk, Project Far North West, Don River Railway and TT-Line projects and others.
- **Agritourism:** Advocate for legislative change with regulation mapping





INDUSTRY SUPPORT

We facilitate a cohesive and engaged tourism industry across the region through:

Strong communication: maintaining regular, transparent communication with all stakeholders at regional and state level across a range of formats/channels including face-to-face, eNewsletters, social media, meetings and presentations; and

Forums + Events: curating of a calendar of tourism industry events throughout the year including consultation, education, networking and socialising.

This work is carried out in close partnership with Tourism Tasmania, TICT, THA, our counterpart RTOs and various other bodies.

What we WILL do

- Industry consultation (inc. 2030 strategy) Facilitate liaison between government (state/local) and industry.
- Operator site visits to assist, advise, educate and connect.
- Facilitate operator presentations to Tourism Tasmania.
- · Activity relating to charity and social awareness.
- · Host events for education, discussion and social/networking.
- Communicate opportunities for grants and/or other funding.

What we WON'T do

Provide unlimited training and support to one operator or municipality.

Function | **SUPPLY-SIDE**

PRIORITY INITIATIVES | 2023-2024

- **Industry Events**: Deliver a calendar of forums and events that respond to the needs of industry as they arise; providing education and networking.
- Famil Program: Develop a program whereby tourism operators and other stakeholders can experience tourism product ('famils') across our region to improve product awareness and assist TTas with supporting famils.
- **Local Tourism Associations:** Actively contribute to the LTA's to assist in achieving their key priority actions.
- **Cruise**: Support and educate our industry on how to capitalise on the Cruise sector.
- Council Strategies: Where required, assist councils to develop a local tourism plan, drawn from this regional strategy, aligning with the 2030.
- **Agritourism**: Actively maintain momentum in developing this sector.
- New Spirit Shups: Work with industry and with local and state government to prepare for the arrival of the new Spirit of Tasmania Ships.

PRIORITY INITIATIVES | 2023-2024

- West Coast Adventure Tourism: Grow adventure tourism on WC by leveraging new MTB trails, supporting existing operators and new entrants through the Adventure Tourism Prospectus.
- King Island Visitor Engagement: Support development of improved visitor interaction with the island via maps, app, signage and/or interp.
- Tasting Trail: Drive the next stage of development, through enhanced membership, experience delivery and growth of the TrailGraze event.
- West Coast Heritage Tourism: Work with the consultant in pulling together the Heritage Tourism Strategy, alongside the project reference group.
- Visitor Events: Drive continuation of regional events including TrailGraze, Permission to Trespass, Stanley Tarkine Forage Festival, Unconformity and a focus on Business Events.
- Develop Existing Product: Proactively support established product in region, Emu Valley Rhododendron Garden, Wild Mersey, Home Hill, Julie Burgess etc..

PRODUCT DEVELOPMENT

We support and enable the development of new products and/or the innovation and reinvestment in existing products.

Tourism product refers to any private sector business or public infrastructure that services the visitor economy, including accommodation providers, tour operators, public signage, events and trails.

We support **new or expanding** tourism developments that align with Tasmania's brand and vision (private and public) through consultation, advocacy, industry liaison, strategic planning, media/marketing support and by connecting developments with available support services, tools, data, grants or education programs.

What we WILL do

- Identification of new product opportunities for the region (Aboriginal, agritourism, adventure and luxury).
- Advice + aid for new product development.
- Support public infrastructure upgrades (signage, tracks, camping).
- Support the growth/enhancement of strategically important 'cornerstone' products for the region.
- Improve environmental credentials of new/existing products.

What we WON'T do

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

Function | SUPPLY-SIDE

MARKETING SUPPORT

We are not resourced to perform in the awareness phase of the Marketing Funnel*. Instead, we support Tourism Tasmania in creating *awareness of our region* in the visitor market, then provide compelling research tools encouraging conversion, visitation and dispersal.

We help to drive tourism demand for our region through:

Strategic marketing partnership with Tourism Tasmania, making sure WxNW products, places and experiences are featured prominently at all stages of the visitor journey, by being Tourism Tasmania's best content partner.

Marketing coordination with state and regional stakeholders to avoid duplication of effort/resource across all phases*;

Destination websites and social media for the region; and

Public Relations where appropriate, to generate media coverage for the region's tourism offerings (*Awareness* phase).

* Marketing Funnel | VISITOR JOURNEY Awareness Advertising, social, etc. Research Websites, social, etc. Booking WxNw are Mainly here

What we WILL do

- Create compelling visual content (image, video, written).
- Facilitate media + visiting journalists/influencers through Tourism Tasmania.
- Manage/support destination websites and social platforms for North West, King Island, West Coast and the Tasting Trail.
- Ensure all marketing communication is aligned to an agreed and customer-focused destination identity for each sub-region.

What we WON'T do

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

PRIORITY INITIATIVES | 2023-2024

- Content Generation: Work with Tourism

 Tasmania, LTAs and local councils to identify any content gaps in our visual library then manage the creation of content to address those gaps.
- **ATDW**: Support the ATDW re-platforming project rollout to industry and actively promote ATDW to acquire new and retain existing business listings.
- Destination Websites: Improve our region's destination websites to optimise user-experience:
 - o northwesttasmania.com.au
 - tastingtrail.com.au
 - westcoasttas.com.au (council-owned)
 - www.kingisland.org.au (council-owned)
- Social Media: Improve our region's destination social media performance against agreed metrics.
 - @visitnorthwesttasmania
 - @visitkingisland
 - @tastingtrailtas
 - @westcoasttas
 - @westcoastmtb

Function | **DEMAND-SIDE**

	PILLAR	GOAL	26 x PRIORITY ACTIONS 23/24	2030 Alignment	KPI (YE Oct 24)	NOTES
	*		Skills and Training	Advocating the core principle of the 2030 strategy, positive impact. Creating a strong foundation for both growth and responsible management by embracing sustainability and a net-zero emissions future. Additionally, focusing on attracting workers to the industry and providing opportunities to the community to see the industry as valuable career.		This pillar is unique, in that advocacy and leadership are required across all other pillars. For example, we will advocate for government support of Don River Railway, for the interests of Tasting Trail members and for strong representation of the West Coast in marketing campaigns.
			Carbon Neutral		≥10 positive tourism projects/outcomes through government advocacy.	
			Inclusive Tourism			
			Visitor Engagement Model			
			Visitor Access			
			King Island Airport			
			Major Tourism Projects			
			Agritourism			
	w Kry Su	Our industry is engaged and cohesive, growing with the opportunities before it and focused on delivering quality experiences aligned to the region's strengths.	Industry Events	2030 vision alongside the Tasmanian score of ≥70%		The nature of this pillar is somewhat reactive, insofar as we will offer industry support however we can, as required. However, these priority projects provide a framework to pursue our KPI.
			Famil Program		Industry satisfaction score of ≥70% (WxNW Industry Survey).	
			Local Tourism Association's			
			Cruise			
			Council Strategies			
			Agritourism			
			New Spirit Ships			
	With many new exciting tourist offerings and the home of the Spirit of Tasmania, our region is seen as a must see destination, with visitors turning right as soon as they get off the boat.	the home of the Spirit of Tasmania, our region is	Visitor Events	Sustainable management of our existing assets, and future development in our region. Creating a positive experience for both the community and visitors coming to our region.	≥5 assisting new tourism products to launch or existing operators to diversify and enhance their product in the region.	Although this should not be viewed as an exhaustive list of product development projects we will support, they will be our strategic priorities for 2024.
			Develop Existing Product			
			West Coast Adventure Tourism			
		·	King Island Visitor Engagement			
			Tasting Trail			
		West Coast Heritage Tourism				
	is powerfully aligned, with digit (websites, social media, etc.) sp language, sharing consistent in focused more on the visitor jou	Our region's approach to destination marketing is powerfully aligned, with digital platforms (websites, social media, etc.) speaking the same language, sharing consistent information and	Content Generation	We will work alongside Tourism Tasmania to manage growth, a value over volume strategy. We will focus on increasing yield, attracting visitors to our region, increasing winter and shoulder seasons along with targeting customer segments aligned with Tasmania's brand.	Net increase in visitor nights for our region (TVS + NVS Report).	It's important to remember, this particular pillar is primarily built around our partnership with Tourism Tasmania, as the state's destination marketing agency with resources to be effective in market (RTOs are very small organisations).
			ATDW			
			Destination Websites			
		focused more on the visitor journey perspective than local/municipal boundaries.	Social Media		(175 + 1175 Report).	
		Ž	Drive updates/content into Tourism Tasmania			







WEST COAST VISION FOR 2025

To be recognised as Tasmania's wilderness adventure-tourism hub, with experiences ranging from soft to hard adventure experiences delivered by a professional and passionate local tourism industry.

DESTINATION MANAGEMENT | FOCUS FOR 2024

- Amidst the launch of the adventure tourism prospectus, the expansion of the MTB
 network and the development of the next iconic walk. Our focus is to position the
 West Coast as an adventure tourism destination through product development.
- Given the apparent revival in market demand on the West Coast, our attention needs
 to focus towards the supply-side. This includes prioritising workforce development,
 the need for accommodation and fostering heightened collaboration within the local
 industry.
- The development of a West Coast Heritage Tourism Strategic Plan, encompassing the West Coast Wilderness Railway and Heritage Centre concepts, is crucial for preserving the region's history, driving sustainable tourism, and fostering a genuine connection between visitors and the area's rich heritage.

WEST COAST | DESTINATION NARRATIVE

You know Tasmania. You know quiet walks and rolling fields. You know art and wine and scenic drives. But you don't know this place. You don't know what exists beyond the range of mobile signal, where the weather changes minute to minute. Where paths have to be made instead of followed. Where the trees have endured for 10 thousand years. You don't know the Tasmania that demands you exist on the terms of the land. But you will know it soon. You'll encounter the raw, the untamed and the untouched. You'll come face-to-face with the powerfully, eternally, undeniably wild. And once convenience and excess have been stripped away, you'll discover true nature... and *your* true nature.

All it takes is a short trip outside your comfort zone.







NORTH WEST VISION FOR 2025

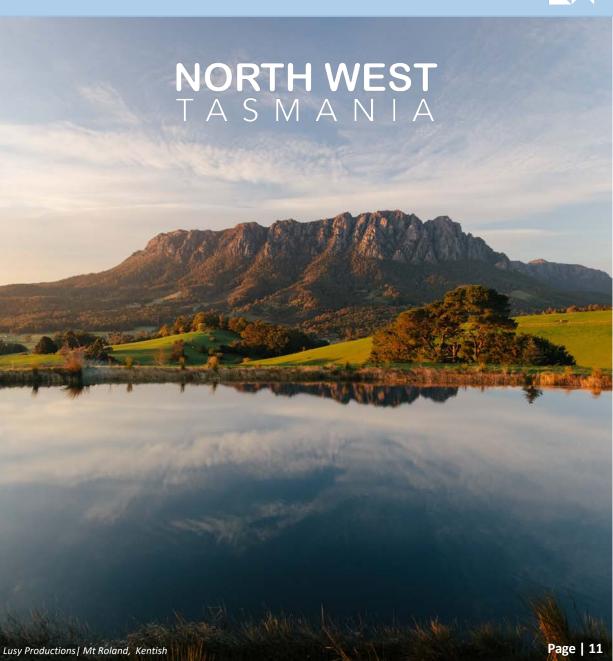
To be Australia's preeminent agritourism destination, embracing, celebrating and sharing our rich agriculture and iconic wilderness; as a truly unified region of passionate tourism professionals.

DESTINATION MANAGEMENT | FOCUS FOR 2024

- With the increase of agritourism product and the potential for more, we must advocate for **legislative change** to reduce red tape to be able to continue to be Australia's preeminent agritourism destination.
- While developing new products, our priority is to proactively elevate established tourism businesses and their offerings, as well as capitalizing on consumer and business events as opportunities to attract visitors to the region.
- We will be a strong voice for our major projects in the region, Dismal Swamp, Cradle Mountain Visitor Experience Master Plan and Don River Railway and will communicate this to our stakeholders.
- Preparing our industry for the the arrival of **new Spirit of Tasmania ferries** in 2024/25.

NORTH WEST | DESTINATION NARRATIVE

We are Tasmania's most successful farmers, industrialists, entrepreneurs, and artists... but we're not big on bragging. Why? Because it's easy to create a beautiful dish with ingredients like this: world-heritage wilderness on one side, empty pristine beaches on the other, and Australia's richest agricultural soil spread between, creating a trail of fresh and unforgettable tastes. And to top it off, we have the cleanest air in the world. Yep, the world! Not bragging, just saying. Just grab the car and drive. Explore! And don't worry about shutting the gate... we know you'll be back.







KING ISLAND VISION FOR 2025

To be a bucket-list destination for those seeking indulgent escapes from the modern world and for golfers seeking the *holy grail* – all delivered as a well coordinated on-island visitor experience.

DESTINATION MANAGEMENT | FOCUS FOR 2024

- Collaborate with Tourism Tasmania and Council to pull together and analyse visitor data to understand who is visiting King Island.
- There is work required in capacity building for the **King Island airport** to ensure its able to welcome the right aircraft, from the right destinations at the right frequency.
- Given the apparent lack of accommodation on King island, our attention needs to
 focus towards the supply-side. This includes prioritising workforce development, the
 need for accommodation and fostering heightened collaboration within the local
 industry.
- Developing a more cohesive on-island **visitor experience**, particularly using digital assets, maps and signage.

KING ISLAND | DESTINATION NARRATIVE

King Island is a long table dinner with food, art, conversation and character unlike anywhere else. Why so different? Because we have to be. More creative, more honest, more challenging, more cooperative, more delicious and more fun. Our golf courses and boutique lodges, steak and triple brie, art centre and museum can't just be good – we have to make them extraordinary. Together.

Life here is just a little bit more... life. A wave from the steering wheel to every approaching vehicle is mandatory; car keys always stay in the car; the hotel concierge and the airport baggage handler are the same person; and we do have traffic lights... but only on a Wednesdays.





In pursuit of our 2025 future state (vision), we will measure our performance annually to monitor progress. For this year's strategy, we will review KPIs at year-end October 2024.

ADVOCACY / LEADERSHIP

Vision for 2025: Our communities understand and appreciate the value of tourism – sharing the best parts of living in the region with our visitors through stories, experiences and great service.

KPI for 2024: ≥10 positive tourism projects/outcomes through government advocacy by YE Oct 24.

INDUSTRY SUPPORT

Vision for 2025: Our industry is engaged and cohesive, positively contributing to our regional community and focused on delivering quality experiences aligned to the region's strengths.

KPI for 2024: Industry satisfaction score of ≥70% by YE Oct 24 (WxNW Industry Survey).

PRODUCT DEVELOPMENT

Vision for 2025: With many new and exciting tourism offerings, our region is no longer seen as 'a long way from Hobart', but instead a destination that must be visited to experience the best of Tasmania.

KPI for 2024: ≥5 assisting new tourism products to launch or existing operators to diversify and enhance their product in the region.

MARKETING

Vision for 2025: Our region's destination marketing is collaborative (focusing more on the visitor journey than municipal boundaries) and powerfully aligned with Tourism Tasmania's work to leverage the state's significant investment in destination marketing.

KPI for 2024: Net increase in visitor nights for our region by YE Jun 24 (TVS + NVS data). In Oct 24, the most recent data will be from YE Jun 24.



PROJECTS IN THE PIPELINE

Major funded projects for the West Coast, King island and North West. Projects are listed in estimate commencement and duration timeframes



