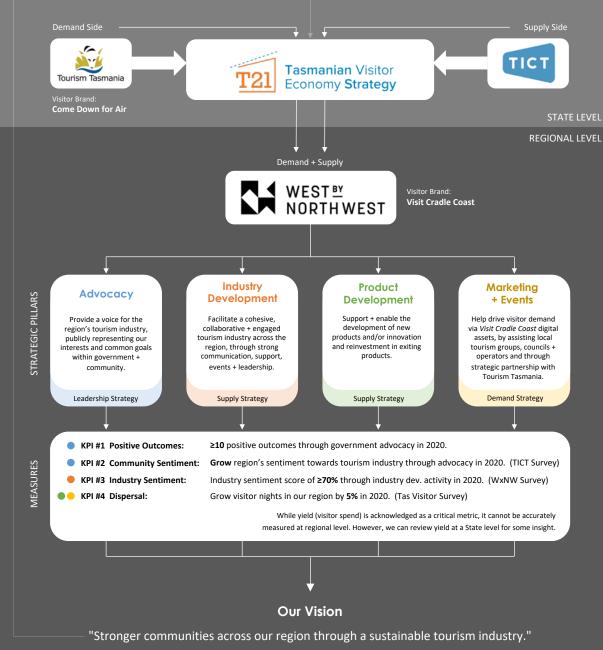


- 1. STRATEGY OVERVIEW
- 2. TOURISM INDUSTRY NETWORK
- 3. STRATEGY EXPANDED
- 4. TACTICAL CALENDAR

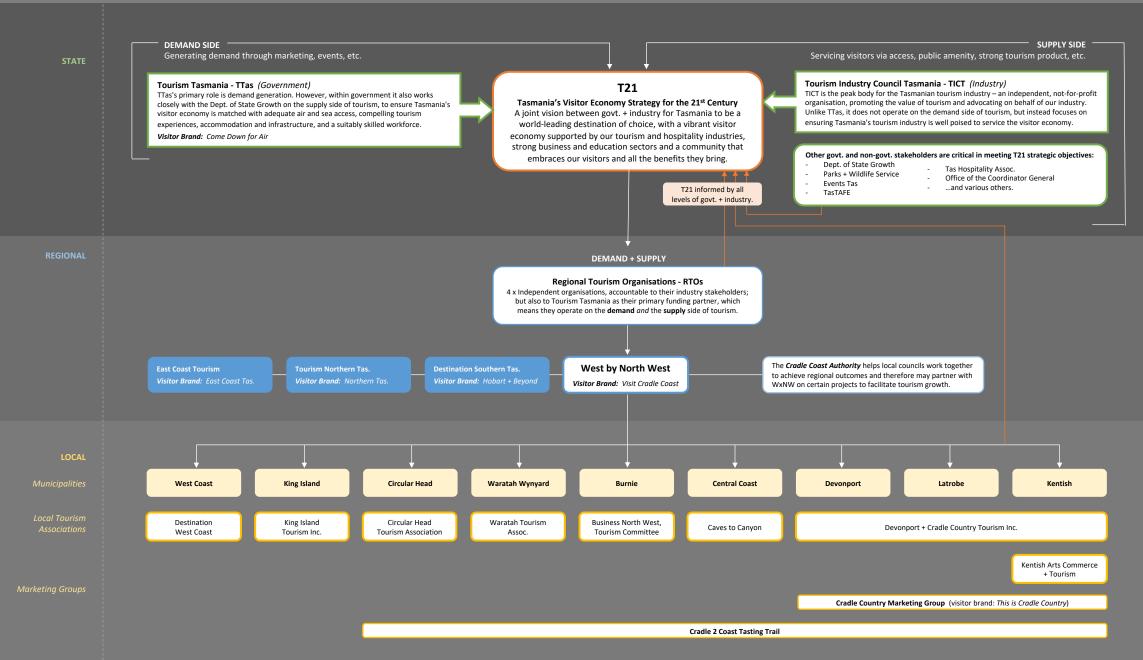






2. TOURISM INDUSTRY NETWORK





3. STRATEGY EXPANDED



CURRENT STATE (SWOT Analysis)

Whilst our region has travel appeal, adequate access ports and a motivated arts + tourism community; our geography, cost of access, fragmented industry and relative shortage of truly world-class and highly differentiated product present barriers to attracting visitors and workers. However, our current opportunities objectively outweigh our threats, providing hope for sustainable growth.

This analysis may not cover every single strength, weakness, opportunity and threat across the region, but hopefully creates a clear enough picture to determine a suitable path to improvement.

Strengths

- . World-renowned visitor icons inc. Cradle, Stanley + Tarkine
- · World's purest air + rain
- · Rich indigenous heritage
- · Strong agricultural district Tasmania's food-bowl
- Cradle 2 Coast Tasting Trail
- · One of the world's best golf courses
- . Access: 3 x airports (KI, Wyn + Dev) and Spirit of Tas ferries
- · Established cruise ship port
- · Burgeoning arts community
- Engaged tourism industry: high proportion owner-operators

Weaknesses

- · Geographic isolation
- · Cost of inbound access via air + sea, compared to LTN + HOB
- · Lack of truly world-class product (accom, restaurants, etc.)
- · Fragmented region (geographically, 9 councils, etc.)
- · Regional tourism industry isolated/disconnected from State industry (comms, activity, collaboration, etc.
- · Cluttered marketing (many websites, brochures, groups, etc.)
- . West Coast, King Island and North West Coast presented as one region to visitors, despite obvious distinctions and barriers
- · Difficulty attracting tourism + hospitality talent to the region

Opportunities

- · Increased capacity of new Spirit of Tas ferries
- · Regional focus created by Drive Journeys project
- Leveraging the attention on Cradle Mountain Master-Plan
- · Investment in MTB + walks infrastructure across the region
- · Growth of indigenous tourism offering
- Growth of agritourism demand
- · Targeting intrastate market during winter + shoulder seasons
- Ready supply of cruise ship passengers
- · Leveraging Paranaple to attract conferences + events market
- Increase industry cohesion, with councils and State goyt.
- · Further develop skills + training for existing workforce

Threats

- · Low demand over winter + shoulder seasons
- · Cost of inbound access remains high, or increases
- · Failure to overcome talent + skills shortage
- . New focus on Cradle not matched by regional appeal
- Failure to meet world-class tourism standard across region
- · Sharing economy disrupting traditional models
- · Forecast slowing of visitor numbers to Tasmania

Marketing + Events

- · Economic instability domestically (bushfires, coronavirus, etc.)
- · Negative community sentiment towards tourism industry
- Cluttered digital platforms making cut-through difficult/costly

STRATEGIC PILLARS (The Pursuit of Regional Dispersal)

The grant deed through which Tourism Tasmania provides funding to RTOs stipulates the following expectations:

- Leadership
- Governance
- Industry Development
- Stakeholder Advocacy and Support
- Demand Generation
- Destination Management

Governance relates to internal management of the RTO. The remaining expectations have been combined with expectations expressed by the region's industry, then summarized into these four strategic pillars. Together, they address the core components of the RTO function, all designed to pursue regional dispersal:

- Supply;
- Demand; and
- Leadership.

Advocacy

Provide a voice for the region's tourism industry, publicly representing our interests and common goals within government + community.

Acknowledging that TICT is the state level advocate for the tourism industry, the RTO will work closely with TICT to advocate specifically on behalf of its region.

Government

Facilitate communications between local, state + federal levels of govt, on matters relating to tourism.

Engage directly with all levels of govt. to advocate on behalf of tourism operators.

NB: Advocacy does not amount to lobbying.

Community

Represent the interests of the region's tourism industry among the community + private sector, through discussion, negotiation, presentation + media liaison.

Leadership Strategy

Industry Development

Facilitate a cohesive, collaborative + engaged tourism industry across the region, through strong communication, support, events + leadership.

This function will also be carried out in partnership with TICT and government agencies.

Communication

Maintain regular, transparent communication with all stakeholders at regional + state level across a range of formats + channels including face-to-face.

Events

Curate a calendar of tourism industry events throughout the year, including consultation, education and social/networking events.

Supply Strategy

Product Development

Support + enable the development of new products and/or innovation and reinvestment in exiting products.

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

Supply Strategy

New Product

Work with all levels of govt... the Cradle Coast Authority, private investors and tourism developers to bring new tourism product to life across the region, through consultation, collaboration, advocacy and leadership.

Existing Product

Assist in the enhancement of existing tourism product through education, advice, benchmarking, supply of

Facilitation

content; and distribution of existing content with the express objective of becoming Tourism Tas' strongest content partner.

Work with all stakeholders to avoid duplication of marketing effort/resource, + ultimately enhance visitor perceptions of the region.

Direct

Creation of new marketing Generate direct marketing activity where appropriate + valuable within the broader strategy, primarily through social media + facilitation of media coverage.

Help drive visitor demand through strategic partnership with

Tourism Tas: through assisting local tourism groups, councils

+ operators; and directly via Visit Cradle Coast digital assets.

For clarity, the RTO is not simply a marketing agency for the

region, but plays a critical role in developing and deploying

marketing strategy at local, regional and state level.

Demand Strategy

FUTURE STATE (Measuring Success)

All KPIs are formulated in line with the SMART Goals model:

- Specific (clearly defined)
- Measurable (quantifiable)
- Attainable (able to be reached) Relevant (worthwhile)
- Time-Bound (clearly defined)

Unfortunately, yield (visitor spend) cannot be accurately measured at regional level and therefore can't be used as a KPI for this strategy. However, we can review this metric at State level for some insight.

- 1. Positive Outcomes: Through liaison with local, state and/or federal government, the RTO were able to influence 10 positive outcomes for its region's tourism industry in 2020. KPI: ≥10 positive outcomes through govt. advocacy in 2020.
- 2. Community Sentiment: By publicly advocating for its region's tourism industry, the RTO influenced growth in community sentiment towards tourism. (annual TICT community sentiment survey) KPI: Grow region's sentiment towards tourism industry through advocacy in 2020.
- 3. Industry Sentiment: By engaging with its region's tourism industry, the RTO grew industry sentiment score from approx. 60% to 70%. (annual WxNW industry sentiment survey) KPI: Achieve industry sentiment score of ≥70% in 2020.
- 4. Dispersal: By supporting product development and destination marketing for the region, the RTO influenced an increase in visitor nights across the region in 2020. (Tas. Visitor Survey) KPI: Grow visitor nights to the region by ≥5% in 2020.

This KPI relates to supply and demand within the broader visitor economy and is therefore shared with government and industry

4. TACTICAL CALENDAR



Our 4 x strategic pillars have potential to produce a very broad range of tactical activity. Therefore, we must be clear about:

- what we may do; and
- · what we won't do

to ensure our strategic objectives remain clear and achievable.

The tactical activity within each of the four strategic pillars is then reported monthly in calendar form. The tactical calendar is an evolving document, projecting activity against need periods and reporting on activity to date.

The calendar is available on our website and distributed monthly to our industry database.

Advocacy

What we may do:

- · Reflect regional sentiment on state level projects
- · Seek action on access issues (air, sea, roads)
- Seek + facilitate training + education assistance
- · Liaise with TICT to lobby on region's behalf
- · Emergency response comms (bushfires/floods)
- · Represent industry via media + community events
- · Provide letters of support, where appropriate

What we won't do:

- Government lobbying (this is the role of TICT)
- Support one operator over others in the region
- Unreasonably favour one municipality over others
- · Provide letters of support to all who ask
- Public comment on matters unrelated to tourism

Industry Development

What we may do:

- · Industry consultation (T21 strategy, journeys)
- · Industry updates between State + Local level, to improve industry dynamics + govt relations.
- Personal site visits with tourism operators, to assist, advise, educate, connect, etc.
- · Activity relating to charity + social awareness.
- · Host events for education, discussion, social/networking, etc.

What we won't do:

 Provide unlimited training and support to one operator or municipality.

Product Development

What we may do:

- · Identification of new product opportunities for the region (indigenous, agritourism, luxury, etc.)
- · Advice + facilitation for new product development
- · Facilitate projects for development of upgrade of public infrastructure (signage, tracks, etc.)
- · Pursue realization of a product's potential (Paranaple, Cradle 2 Coast Tasting Trail, etc.)
- · Enhancement of environmental/social credentials

What we won't do:

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

Marketina + Events

- What we may do:
- · Content creation (image, video, written)
- Content + strategic partnership with TTas Content + strategic partnership with LTAs
- Assist development of Drive Journey's project
- Media + visiting journalists/influencers
- · Visit Cradle Coast website, social platforms, etc.
- · Enhancement of Cradle to Coast Tasting Trail
- · Cooperative marketing projects (multi-operator)
- · Support + facilitate the delivery of cultural events

What we won't do:

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

K	WEST™ NORTHWEST		Nov-19				Dec-19					Jan-20				
- NORTH WEST			WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 1	WEEK 2	WEEK 3	WEEK 4	
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	INDUSTRY DEVELOPMENT		s. Wellers I'm s. young professional, caneer advice			Presented at OffAmeeting, re Journeys Met w. TT-Line to discuss new Spirits Met w. TMN, Exec. Officer	Met vs. King Island LTA()011), President Met vs. Cape Wickharn Golf Course Net vs. King Island Council, Mayor, GM, etc.	West Coast MTB Reference Group Meeting Met ss. The Unconfirmity, Director	Met vs. Feathval of Volces, CEO	Industry Update Email	Media: The Advocabe, Western Wilds	Bushfire Update Ernall to Industry	Met vs. North West Safaris Met vs. Compass Nut Net vs. Kaydale Lodge	Met w. King Island LTA President Met w. King Island Golf Courses Met w. King Island Aleport	Met w. young professional career advice	Industry
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	PRODUCT DEVELOPMENT MARKETING + EVENTS						Letter of Support: Table Cape Luxury Lodge		Met w. operator: new development on coast				Letter of Support: Our Cradle Development			
		New Product Existing Product					Letter of Support: The Unconformity, funding									
Н		(growth)			Met w. PACT - regional ads in Journeys Mag									Met w. Thaire ELK Partnership, Grc. Head	Letter of Support: Burnie Central Townhouse	
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