



Access 2020

FIVE YEAR AIR AND SEA ACCESS STRATEGY
2015 - 2020

Premier's Foreword



The availability of affordable air and sea services connecting Tasmania to the Australian mainland and the world is a critical economic and social issue. It's crucial for the growth and development of our tourism industry; it supports our business community; it provides opportunity for our growing agricultural sector and it's important for all Tasmanians.

As an island community, we compete with other jurisdictions to attract the services we need to support our economic growth and community wellbeing. Our competitive ability to secure sustainable air and sea services to both Australian and international hubs has never been stronger; visitation is at record levels; there's strong demand for our high value and high quality fresh produce and there's unprecedented interest from China in our premium products, business and leisure activities. As well, low global fuel prices along with significant investments in our gateway airports provide an ideal opportunity to establish improved sustainable connections to key growth markets for Tasmanian exporters and tourism operators.

To deliver better sea and air access for all Tasmanians, visitors and businesses, the Tasmanian Government has developed strategic partnerships with air and sea carriers, Tasmania's airports and Tasports. We are committed to delivering sustainable air and sea access to meet the State's goals of attracting 1.5 million visitors annually to Tasmania by 2020 and raising the farm-gate value of agriculture tenfold to \$10 billion by 2050.

The Government is developing the *Tasmanian Integrated Freight Strategy* and working with the tourism industry to develop *T21 – The Tasmanian Visitor Economy Strategy 2015 – 2020*. I am confident this, the first state-wide access strategy for Tasmania, will complement these related strategies and deliver access investments that will maximise the economic and social development of Tasmania through the provision of safe, affordable, sustainable and effective air and sea services.

Hon Will Hodgman
Minister for Tourism



Executive Summary

The efficient and cost-effective movement of people and freight to and from Tasmania is integral to Tasmania's overall economic performance and while passenger and freight access to Tasmania is currently good, it has fluctuated greatly over the years. The purpose of this plan is to improve access to Tasmania through a sustainable increase in frequency and connectivity.

The plan identifies and addresses barriers to services, and will create opportunities that support the Tasmanian Government's goals of attracting 1.5 million visitors by 2020 and increasing the value of Tasmania's premium food exports. The success of the Government and industry tourism strategy *T21 – The Tasmanian Visitor Economy Strategy 2015 – 2020*, relies on sustainable and increasing air and sea access to Tasmania.

Improvement in air access over the last three years has been the single largest driver of visitation to Tasmania. The number of available seats has increased on all air routes from Melbourne, Brisbane and Sydney. The outcomes for Tasmanian routes have been lower prices and a strong growth in visitation.

By improving access to key markets through more frequent and more direct flights, the *Access 2020* plan aims to drive visitation of high yield holiday markets, grow business and social connectivity and improve speed-to-market for Tasmania's premium produce exporters. The plan supports significant investments in the production of Tasmania's high quality seafood, fruit, meat and dairy industries.

Increased air and sea domestic capacity and frequency to meet and drive demand are deliverables of the plan along with improvements in seasonal demand and affordable airfare availability. Increases in international visitation and the attainment of direct international services are also important components of the plan.

To meet Tasmania's target of 1.5 million visitors a year by 2020, total air capacity will need to increase by 700 000 seats over that time. To achieve this, the plan targets 140 000 new seats per year.



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Tasmanian Context

Visitation

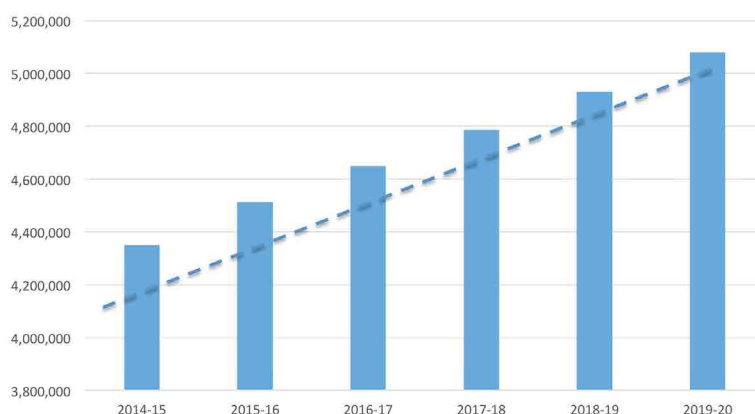
The global aviation industry is forecasting significant growth; Airbus forecast global traffic to double in the next fifteen years with the greatest growth coming from the Asia Pacific region. Aviation has also proven to be resilient to external shocks, growing 73% globally in the last 10 years with only short-term dips through multiple crises. Lower fuel prices are helping to improve the viability of airlines, most of which continue to operate with low return margins on invested capital.

In Australia, domestic aviation returns are improving following a sustained period during which airlines prioritised additional capacity and market share strategies. In 2014, a shift from capacity growth to focus on yield stabilised the industry. However, given the intensity of the current competition in the market and the sharp increase in visitors to Tasmania over the past year, a shift to yield-strategies by airlines brings a risk of slowing visitor growth. Tasmania needs to monitor this closely in future and develop strategies to sustain growth in capacity, yield and visitor numbers. In the year ending June 2015, some 82 857 additional adhoc and scheduled air seats were flown to Tasmania's gateway airports, Hobart and Launceston representing a 2% capacity increase on the key routes of HBA-MEL, HBA-SYD, HBA-BNE & LST-MEL, LST-SYD & LST-BNE.

Tourism Tasmania's domestic Tourism Info Monitor (TIM) research identified the potential for Tasmania to nearly double its current share of domestic leisure visitors if market barriers were overcome. The three barriers identified by travelling Australians in the research were more frequent flights from where they live, more direct flights from where they live, and the availability of holiday packages. The report also revealed that the affordability of flights was not as important as the frequency and availability of direct flights.

Record visitor numbers, high international awareness following the Chinese President's visit, the Lonely Planet Top Regions to Visit in 2015 listing, other international recognition, and the global Restaurant Australia campaign are

Access 2020 - Airline capacity target (main routes)



- Air capacity on major routes (HBA & LST – SYD / MEL & BNE) in 2014 was 4.19 million seats.
- Almost 1 million visitors (90% of all visitors to Tas) came by air; therefore an estimated 2 million seats were used by visitors to Tasmania.
- If 90% of visitors continue to travel by air, an estimated 2.7 million airline seats will be required to support 90% of the 1.5 million visitors Target for 2020.
- If you add the 2.2 million seats held for Tasmanians, assuming low population growth, this would require total air capacity to reach 4.9 million seats by 2020.



driving international demand for holidays in Tasmania. The most recent International Visitor Survey shows that there were 197 600 international arrivals to Tasmania in the year ending March 2015, a 28% increase from the previous year. China was the biggest growth market with a 42% increase to 28 000 visitors.

The Hobart Airport runway extension and the Launceston and Hobart passenger terminal investments are timely and designed to deliver improved passenger experience and more efficient passenger processing. The runway development will enable wide-body jets to fly direct to Asia and swing gates allow for international customs processing as required. Other facilities for passenger and freight services are the subject of ongoing planning by Hobart and Launceston Airports.

Agriculture

The Government's vision to grow the value of agriculture tenfold to a \$10 billion industry by 2050 will require increasing both sea and air access. This strategy focuses on air freight solutions, both dedicated flights and as belly space on passenger services. The State's investment in expanding irrigation to increase production of premium, value-added foods as well as seizing opportunities to access new markets are important steps toward achieving this goal. For premium foods with a limited shelf life, direct airfreight services would enable access to new interstate and international markets previously out of reach and bolster the value of our brand and products by ensuring produce arrives in top condition. Expanding the freight options available to Tasmanian producers opens supply chain opportunities and will augment the shipping services over Bass Strait. These are all important steps toward achieving the 2050 goal.

Sea Access

Sea services are an important part of Tasmania's access mix. Most of Tasmania's freight is transported across Bass Strait by sea. However sea freight services and the sea ports at Hobart, Devonport, Burnie and Bell Bay form part of the Government's *Tasmanian Integrated Freight Strategy* and are not addressed under this *Access 2020 strategy*.

Rather, *Access 2020* addresses sea passenger access and considers the Spirit of Tasmania as critical tourism infrastructure given that around 10% of Tasmania's visitors arrive by sea aboard the Spirit. These visitors bring their own vehicles, and on average stay longer, spend more and disperse more widely around the state than air passengers¹.

Passenger sea access to Tasmania is evolving and has the potential to increase yield for the state. In the year ending June 2015, TT-Line carried 384 501 passengers on Spirit of Tasmania I & II, a 7% increase on the previous year. TT-Line also carried 102 000 twenty foot equivalent units (TEU's), their largest ever freight load. Over the next five years, TT-Line will focus on growing passenger numbers to Tasmania through increased day sailings.

The 2015 refurbishments give the Spirits a new contemporary design, improving passenger comfort and facilities and extending the life of the ships to 2022. The refurbishments have generated significant interest and strong forward bookings. A total of 33 additional sailings have been scheduled for 15-16 and TT-Line and Tourism Tasmania have entered into a Memorandum of Understanding (MOU) to collaborate more closely on further market stimulation activity.

¹ Source: Tasmanian Visitors Survey, YE June 2015



Cruise Ships

Cruise ships present Tasmania with a long-term opportunity to grow visitation and yield. This is a traditionally high volume, lower yielding market segment, however there are opportunities to increase the yield from this sector through increased shore excursions, overnight stays, fly-cruise connections and seasonal base port and ship provisioning solutions. Cruise visitor numbers to Tasmania rose again during the 2014-15 summer period to a record 162 815 visitors. Cruise Down Under estimate that cruise ships contributed \$32 million² to Tasmania in 2014-15. Growing this contribution through a greater number of ship visits and more time spent in port are the key goals of this strategy.

Regional Access

Tasmania's smaller regional air services and airports provide essential services to their local communities and enable visitor dispersal around the state.

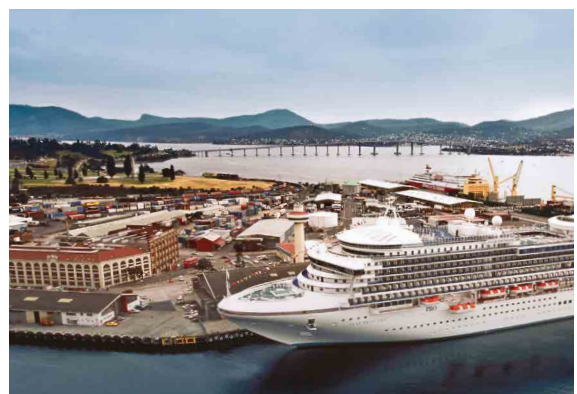
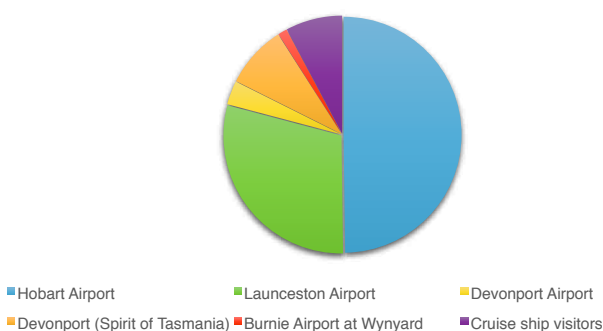
Burnie Airport is a key link to King Island, as Launceston Airport is to Flinders Island. These connections are important for maintaining access for those local communities and the businesses that support them. Burnie and Devonport Airports are equally important to the North West region of Tasmania. The Tasmanian Visitors Survey shows Burnie Airport carries mostly business and visiting friends and relatives traffic, while Devonport Airport has a more even split of business, visiting friends and relatives and holiday passengers.

The Government recognises a need for flexibility regarding regional access and will respond to the challenges and opportunities in the regions as they arise.

A Whole of Economy Approach

The Tasmanian Government believes that a whole-of-economy approach to access that engages stakeholders provides the most appropriate mechanism to develop and implement strategies aimed at building and maximising capacity for Tasmania. Stakeholders include visitor and residential passenger traffic, inbound and outbound freight, Australasian and international Antarctic programs, and international student programs. All of these support the economics of the sea and air passenger services that are provided in a complex and competitive commercial environment in which Tasmania competes with other destinations to retain and build capacity.

Access points - combined resident and visitor departures source; TVS YE March 15





Enabling Infrastructure

Access infrastructure generally consists of ports and airports. In Tasmania, the ownership and management of access infrastructure is mixed. Tasports, a Government owned entity, operates Tasmania's main seaport infrastructure as well as Devonport Airport. Local Governments own and operate Burnie Airport, Flinders and King Island Airports. The Tasmanian Gateway Consortium, a partnership of Macquarie Global Infrastructure Fund and Retirement Benefits Fund, owns and operates Hobart Airport, while Australia Pacific Airports Pty Ltd is the owning majority of Launceston Airport in partnership with Launceston City Council.

The Tasmanian Government is working with these infrastructure companies to ensure that these essential assets meet future demand and that supporting services such as roads support this growth.

Significant investments in our ports and airports have been announced or recently delivered during the development of this plan. These investments will provide the necessary expansions and facilities required to meet passenger and freight growth targets and deliver on the access goals set out in this plan.

With over 90% of all visitors to Tasmania coming by air safe, efficient and competitive airports are essential to all Tasmanians. Our major airports of Hobart and Launceston are required under Commonwealth legislation to develop a detailed master plan every five years that provides a strategic plan and outlines infrastructure development for the airport based on passenger forecasts.

Hobart Airport

Hobart Airport is undergoing an exciting period of redevelopment and growth with an overall investment of \$100 million in three key projects to expand and improve Tasmania's major gateway.

Hobart Airport carries 60% of all scheduled air traffic to Tasmania. At June 2015, this translated to a record 2.18 million passenger movements, an increase of 5.2% from 2014.

One of these projects is a \$40 million runway extension that will add 500m, bringing the runway to 2,700m and enabling larger aircraft to travel further when leaving Hobart. This will allow wide-body aircraft to fly direct to Asia and provide more flexible operations to Antarctica. The runway extension enables many economic opportunities for Tasmania and is an important part of the airport's infrastructure plans.

The 500m extension is essential for improving Australia's air link to Antarctica and to strengthening Hobart's competitive position as the gateway to Antarctica.

The \$25 million investment in the Hobart Airport terminal will expand the terminal area, improve the passenger experience and allow for international passenger processing at Tasmania's premier gateway by 2018. The terminal will deliver a boutique Tasmanian experience featuring Tasmanian food and beverage offerings, Tasmanian retail products, more than double the space for departing passengers and improved overall comfort and efficiency for operations and passengers.

Other investments include a recent \$30m runway and taxiway overlay and investments in car parks and the airport road network.

Hobart Airport is an important part of the Tasmanian economy with an annual economic contribution of \$143 million and over 731 full time equivalent employees across the site³.

³ Source; Draft Hobart Airport Master Plan 2015



Launceston Airport

Launceston Airport has experienced significant passenger growth during calendar years 2012-2014 (averaging 4.7% per year). By June 2015 Launceston Airport passenger traffic reached 1.28 million, putting it in the top twelve airports in Australia.

Enhancements to the airfield completed in 2013 include a \$6 million upgrade to the southern freight apron, providing the capacity to accommodate three B737 freighter movements concurrently. The airport completed significant improvements to the passenger screening facility and operations in May 2014. And an extensive \$5.8 million works program, completed in early 2015, transformed the airports landside precinct by upgrading the entrance, roadway systems, taxi and coach staging areas, improving car park capacity and adding for the first time an undercover car park. The airport completed an \$11.5 million runway overlay in May 2015 and has commenced a \$3.5 million terminal upgrade. The upgrade will double the retail space, maximising passenger views of Mount Barrow, and will include additional dining areas and a showcase platform for Tasmanian beer, wines, whisky and other signature products. The facility will also introduce phone chargers, power outlets and Wi-Fi. The project is due for completion before December 2015.

Contributing significantly to economic activity in the north, Launceston Airport and its on-airport operators employ more than 400 people in a diverse range of activities. Some 28 individual businesses operate on the airport precinct, with a further 37 off-airport business and contractors engaged in servicing operators at the airport.

Hobart and Launceston airports are significant economic drivers and together welcome 86 per cent of visitors to Tasmania. The considerable investments both airports are making are delivering critical access infrastructure and driving tourism and economic growth in the state.

Regional Airports

Tasmania's regional airports, located at Devonport, Burnie, Flinders Island and King Island, provide vital services to their local communities and create corridors for visitors and business travellers into Tasmania's regions.

Smaller facilities exist in Cambridge, Smithton, Strahan, St Helens and Queenstown. Some are council operated and some are privately owned. These facilities allow for charter and private flights on smaller aircraft and facilitate business and leisure travel where it is uneconomical to operate regular passenger transport (RPT) services.

This Access 2020 plan includes project delivery elements that address access to Tasmania's regional airports.

Spirit of Tasmania

Spirit of Tasmania is a critical piece of Tasmania's tourism and access infrastructure with around 10% of visitors to Tasmania arriving on the Spirit. However it is not the role of this plan to address the details of TTT-Line's forward strategy. Instead, it addresses regular domestic sea traffic as part of Tasmania's overall access capacity and forward targets.

Sea visitors are a critical part of Tasmania's visitor mix. On average they stay longer and they spend more per person per trip compared to air visitors, that is, 17.6 nights and \$2686 spend per person per trip compared to 6.8 nights and \$1582 per trip for air visitors⁴. Sea visitors also disperse more widely to regional areas of Tasmania.



Lowering fares and growing sea visitors to Tasmania via Spirit of Tasmania, while at least maintaining the current freight load, are goals of this access plan and are best achieved by sailing the twin ships more often.

Tasmania has invested in the refurbishment of the Spirit of Tasmania vessels in order to improve the visitor experience and to better provide extra daytime sailings designed to accommodate more visitors to Tasmania during our peak season. TT-Line completed the refurbishment of both vessels in September 2015.

Access Working Group

The Tasmanian Government has appointed a Director of Access and Aviation Development to take responsibility for a whole of government approach to access issues including the development and delivery of this long-term strategy in line with overall government policy and in conjunction with key stakeholders.

An Access Working Group, led by the Secretary, Department of State Growth, provides direction and assistance to ensure the strategy is effectively implemented. The Access Working Group oversees the development and delivery of Tasmania's five year access plan and provides a platform for a coordinated whole of government and industry approach to the implementation of the Access 2020 plan. The group is responsible for progressing outcomes through commercial and government channels and monitoring the effectiveness of the strategy.

The group's focus is passenger access. The group will also address airfreight issues and those aspects of freight that impact on the economics and development of passenger services. The working group considers access in the context of both direct and connected services that link Tasmania with interstate and overseas destinations, including air and sea services and the infrastructure that supports them, mainly ports and airports.

The group work with sea and air access partners and infrastructure managers on pricing, market stimulation, asset utilisation and yield management activities to deliver the best outcomes for Tasmania. The group will measure the ongoing impacts and effectiveness and undertake strategy review through the life of the plan.

The members of the Access Working Group are:

- Secretary, Department of State Growth (chair)
- Secretary, Department Premier and Cabinet
- CEO, Tourism Tasmania
- CEO, Hobart Airport
- General Manager, Launceston Airport
- General Manager, Commercial and Trade, Tasports
- CEO, Spirit of Tasmania
- Director, Access and Aviation Development



Goals and Strategies

Access 2020 is a dynamic, market-driven access plan. Over the life of the plan, Tasmania's passenger and airfreight requirements will change and fluctuate, as will the operating environment of airline partners, as fuel prices and other operating conditions fluctuate.

To achieve the best access outcomes, Tasmania needs to remain acutely aware of conditions on both the demand and supply side of access provision and be able to respond and 'pitch' for capacity and services. The ability to stimulate and support demand in growth markets to take up new capacity is critical to the success of the project.

This document provides an overview of the Tasmanian Government's goals and strategies, acknowledging that success will require a flexible and opportunistic approach to solution delivery.

The primary objectives of Access 2020 are:

- **Domestic Air Access:** Increase available seats and frequency of flights and the optimisation of affordable fares to deliver a target of 700 000 new domestic airline seats by 2020
- **International Air Access:** Increased international visitation through improved connectivity to Tasmania and the attainment of a small number of direct flights from two Asia-Pacific hubs
- **Air Freight:** The introduction of effective airfreight solutions to stimulate growth and improve delivery of time-sensitive products to domestic and international markets
- **Sea Access:** Increased sea passenger access via TT-Line following the Spirit of Tasmania refurbishments and capacity increases. This also includes increasing the yield and direct economic contribution of the cruise industry.
- **Regional Access:** Increasing tourism yield in regional areas of Tasmania through visitor dispersal via regional access points and improving the sustainability of Tasmania's regional access infrastructure.





Domestic Air Access Development

Goals

- Grow capacity across the key routes MEL/SYD/BNE to Hobart and Launceston by 700 000 seats by 2020
- Improve connectivity, frequency, and low fare availability on existing domestic routes to support and drive visitor growth
- Develop and support new direct domestic routes
- Flatten seasonality through increased demand from new and existing markets in order to retain capacity viably all year round

Domestic Access Strategies	Projected Outcomes
Improve data analysis and understanding of aviation traffic and performance to enable business case development and effective airline approaches for additional capacity and new routes	Data tools and forecasting models to accurately monitor and forecast air traffic flows. Regular reporting and investigation of current route performance and monitoring forecast viability for potential new routes
Sustainably improve Tasmania's connectivity with mainland Australia by engaging with all domestic airlines to develop and present business cases for increasing frequency, capacity and the availability of affordable fares on key routes between Hobart, Launceston, Devonport and Burnie and Melbourne, Sydney and Brisbane	Build the ability to influence short and long-term capacity decisions on Tasmanian routes Maintain and increase airline focus on Tasmanian routes Increase visitors, access for businesses and opportunities for domestic air freight
Develop new direct domestic connections by closely monitoring traffic between Tasmania and Australian destinations e.g. Perth, Adelaide, Gold Coast, Canberra, in order to prepare and present co-ordinated and supported business cases for new routes when viability is suggested	New domestic routes in the medium and long term delivering increases in visitors, business and freight connections
Align tourism and other State Growth marketing strategies and network planning activities with airline partners to drive demand in the key markets of Victoria, New South Wales and Queensland Maintain and build our marketing partnership with each domestic carrier to continually drive demand and monitor performance. There is a focus on cooperative marketing activity to flatten seasonality by stimulating shoulder and off peak demand.	Innovative airline campaigns that drive conversion in Tasmanian holidays, by maintaining awareness and low cost seats to Tasmania Growth in demand for Tasmania to secure capacity and frequency increases Improved airline yield
Work with Tasmanian access infrastructure owners to ensure gateway infrastructure and facilities at Tasmania's ports and airports meets passenger demand	Completion of runway and terminal redevelopments at Hobart and Launceston airports Successful master plan process for Hobart and Launceston airports Improved visitor arrival experiences, on-time performance and freight logistics solutions Suitable infrastructure maintained at regional gateways, Devonport, Burnie, Flinders and King Islands

International Air Access Development

Goals

- Grow international visitation by improving connections to Tasmania through Melbourne, Sydney, Brisbane hubs to Launceston and Hobart
- Secure the introduction of direct flights from two international cities by 2020, adding approximately 57 000 direct seats per annum

International Access Strategies	Projected Outcomes
Grow an international access partnership with the Qantas Group	Increased visitation from China, Hong Kong, Europe-UK, NZ and USA via Qantas and Qantas alliance partners
Drive increased international visitation via Virgin Australia and its partners, using connecting domestic services originating in Melbourne, Sydney and Brisbane	Increased international visitation from Singapore, China, USA, Europe and New Zealand via Virgin Australia and their partners
Work with Hobart Airport to develop international airport capability, effectively support the runway and terminal developments and help prepare for regular international air traffic, including customs and logistics and improving international passenger arrival and departure experience	Completion of the runway and terminal projects in 2018 Limited number of direct, seasonal international services, building to sustainable regular international air services direct from Tasmania to Asia-Pacific visitor source markets
Work with airlines and Hobart Airport to develop a direct Asian connection	Establishment of a new direct service to an Asian hub that delivers increased visitation and dispersal to Tasmania by international visitors already arriving into main Australian airports
Develop Melbourne and Sydney as a gateway airports to Tasmania by improving the processing experience of passengers transferring to Tasmania in cooperation with the airports	Increased traffic via Melbourne and Sydney with better connections and scheduling Improved passenger experiences and easier connections and Tasmania promoted within distribution networks and at the airports

Sea Access and Cruise Development

Goals

- Grow visitor numbers arriving in Tasmania via TT-Line by 10 000 a year from 2015 to 2020
- Grow the number of cruise ship visits and the time spent in port to maximise economic benefits to the state
- Grow yield from the cruise ship sector through overnight stays, ship provisioning and increased air lift requirements

Sea Access and Cruise Strategies	Projected Outcomes
Build demand for more sailings by working with TT-Line on the development of a long-term joint promotional program	Increase passenger capacity through seasonal day sailings by TT-Line Improved strategic alliance between TT-Line and Tourism Tasmania and a program of cooperative marketing activities that deliver increased visitation to the state
Grow tourism revenue from the cruise ship sector through longer, more frequent berthing of large ships, overnight stays and provisioning of vessels in Tasmania	Increased yield for Tasmania from cruise ship visitors
In partnership with Tasports, grow the number of large cruise ship visits to regional ports, particularly Burnie	Tas Ports has announced the provision of additional infrastructure at Burnie. A mooring dolphin to be installed to attract larger cruise liners. The \$1.5 million project, to be managed and funded by Tasports, will give access to the city for 19 cruise liners operating in Australian waters and previously unable to dock and will be completed by the 2016-17 cruise season.
In partnership with Tasports and Hobart City Council, evaluate and prepare a business case to use Hobart as a base port, including provisioning the vessels and embark/disembark passenger processing	Growth in embark/disembark and provisioning activity to increase ROI over lower yielding transit port activity and development of fly/cruise market Increased use of Hobart port facilities
Work with the higher yielding, smaller ship expedition cruise operators to develop Tasmanian itineraries and grow the market following the relaxation of coastal shipping regulations by the Federal Government	Increase of high yield, small-scale cruise activity in regional areas, encouraging longer stays, repeat visits and affecting dispersal

Regional Air Access Development

Goals

- Grow visitors and yield to regional areas of Tasmania – dispersal via access points
- Improve sustainability of regional access infrastructure, addressing challenges and opportunities as they arise

Regional Access Strategies	Projected Outcomes
Grow current air services to Burnie and Devonport, working in conjunction with the airports, carriers and Regional Tourism Organisations	Increased traffic and capacity to Devonport Airport Increased traffic to Burnie Airport
Improve the long-term sustainability at the regional gateways of Flinders and King Island and manage the risk of one-carrier operations by supporting remote airports in co-operation with the local and Federal Australian Governments	Local government developed access plans for the islands Sustainable services for passengers and air freight Create long-term access solutions to support unique infrastructure, for example, golf course development
Ensure adequate access to meet demand for King Island golf courses	Significant increased demand for King Island driven by two new world-class links golf courses Opportunities for further development of the tourism industry on King Island and related services
Assist University of Tasmania and their partners in their China-Asia aviation training certification and pilot training to develop an aviation training program, delivered at Tasmania's regional airports	Increase in international students attending University of Tasmania Increased sustainability and use of regional airports Raising Tasmania's profile with Asian airlines and encouraging international airline investment and interest in Tasmania

Air Freight Access Development

Goals

- Introduce effective airfreight solutions, particularly for new, growing export markets and domestic markets beyond New South Wales and Victoria
- Increase air freight uptake to improve air service viability and provide an opportunity to increase air capacity (domestic and international)

Air Freight Strategies	Projected Outcomes
Integrate air freight potential into passenger business cases	Improved air service viability and sustainability Increased exports and subsequent Tasmanian awareness Increased opportunity for domestic and international capacity additions
Develop and introduce effective airfreight solutions for Tasmanian producers and exporters of high value, perishable exports such as cherries, abalone, lobster, salmon, berries, flowers, milk, meats and other fish	Improved speed to market for Tasmanian exporters and producers Improved supply chain solutions
Explore intermodal freight solutions that incorporate air freight through the Department of State Growth's Integrated Freight Strategy	Effective freight solutions through an intermodal hub Improved air freight solutions at Hobart and Launceston airports



Conclusion

The development and implementation of a long-term sea and air access plan for Tasmania is a critical enabler of tourism, business and social growth. *Access 2020* aims to increase access to Tasmania in partnership with the airlines, airports, ports and shipping companies to ensure visitation growth continues and to provide air freight solutions to Tasmania's emerging agriculture markets. Increasing capacity and frequency to passenger and freight services will produce more affordable fares ensuring access for all. In the competitive commercial environment of aviation and access service delivery, Tasmania can only achieve these goals with all sectors of government and industry working together to gain a competitive advantage through co-ordinated efforts.

Over its five-year life *Access 2020* will identify air and sea access development strategies, including working with the aviation industry on pricing, market stimulation, asset utilisation and yield management activities. The Tasmanian Government is committed to delivering the sea and air access capacity, frequency and connectivity required to create real opportunities and growth for all Tasmanians. This plan will contribute to achieving the goals of attracting 1.5 million visitors annually into Tasmania by 2020 and raising the farm-gate value of agriculture tenfold to \$10 billion by 2050.

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