

Hobart Airport



Hobart Airport
TASMANIA

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Strong Growth

Hobart Airport

- Hobart Airport - a key economic driver for Tasmania
- 2.7 million passengers last year
- Responsible for \$143 m in economic activity*
- 731 direct and indirect jobs*
- Expected growth to continue – 5% year on year
- Passenger numbers to 4.3M by 2030
- Domestic and International opportunities
- Commercial development to diversify portfolio



Connecting Communities



The Downturn

March 2020 - a month to remember

As a result of COVID-19 response, flight movements initially reduced by 94 per cent from 60 per day to two (one plane a day!)

This meant:

- 96% decline of PAX numbers for the quarter;
- Reducing the PAX numbers by 625k for the quarter or 48k per week;



The Downturn

April 1 st – July 19 th	2019	2020	Difference
Flights	3144	185	-2,959
Pax On	429,970	8,298	-421,672
Pax Off	409,358	5,915	-403,443
Freight	979,928kg	510,068kg	-469,860kg

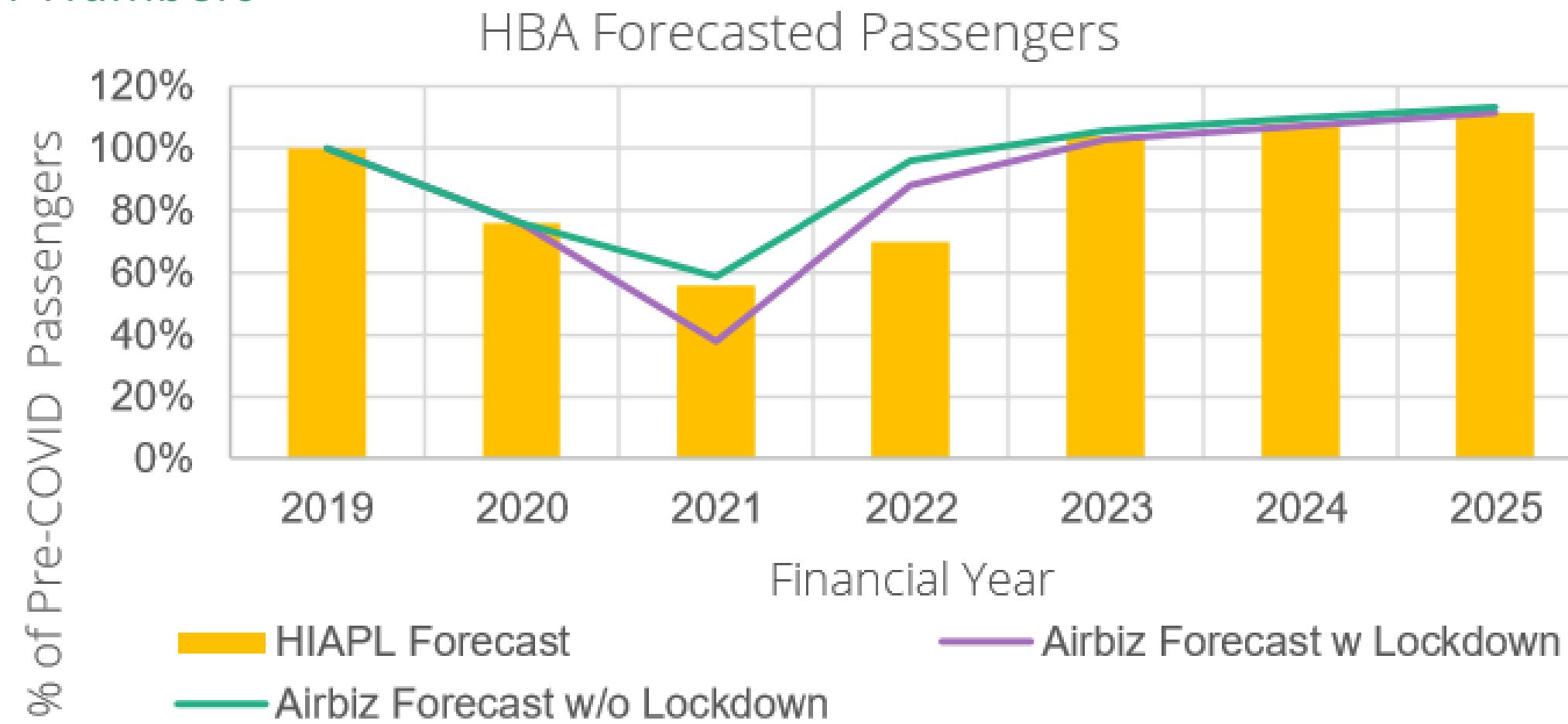


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Recovery

Forecasted Passenger Numbers



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Recovery Approach

Increasing Consumer Confidence to fly.

- Providing reassurance on risk reduction measures and the safety focus of the airport
- Focus on consistency of protocol across the customer journey
- Ensuring consistency of messages with government, airlines and other airports

Stimulating Demand

- Communicate jurisdictional restrictions and timing for lifting
- Industry partnerships to support lower fares and linkages to hotels/tourist destinations
- Include corporate travel focus
- Support local tourism campaigns

Increasing Consumer

Confidence to fly



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Global Key insights: Travel 2020

01

Safety is the number one concern governing the foreseeable future of travel, across every demographic

02

The delaying of vacations and flights has steadily increased over the course of the pandemic

03

Vacation behaviors are already showing clear signs of a shift towards domestic travel as restrictions and continued global transmission dampens travel confidence

04

Safety concerns are being compounded by financial concerns as an increasing realization of the personal financial impact of the outbreak sets in

05

Intent to travel in the future is still very much present, and many are tentatively checking prices and researching future destinations in the anticipation of a recovery

Local Community Feedback Overview

Facebook Survey

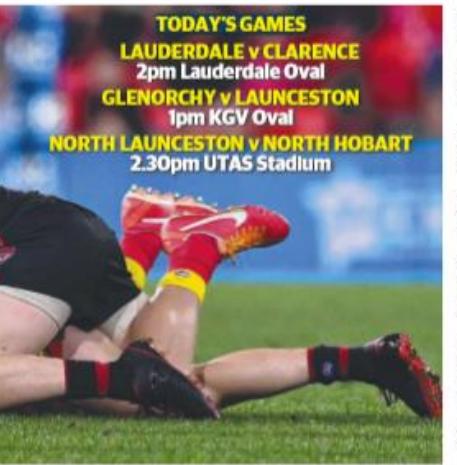
- Pre Covid, VFR and Holiday were the two most popular reasons for travel sitting at 40% each.
- 43% of respondents would consider flying as soon as our borders open with 38% waiting at least 6 months
- 55+ Are the most cautious about returning to air travel
- QLD is the top destination listed for travel when our borders re-open for all age groups except 65 + who are heading to NSW
- VFR will be the primary purpose for travel for those who are 45+ and a Holiday is top of mind for those who are 18 – 44

Communications

HOW WE ARE PROTECTING YOU

- Additional hand sanitiser stations in high traffic areas
- Rearrangement and removal of some seating to promote social distancing
- Regular cleaning of high touch areas including bench tops, seating, door handles and power outlets
- Helpful signage and markers to promote social distancing when queuing
- Zero contact parking option using number plate recognition
- Hobart Airport TASMANIA

first bounce



TODAY'S GAMES
LAUDERDALE v CLARENCE
2pm Lauderdale Oval
GLENORCHY v LAUNCESTON
1pm KGV Oval
NORTH LAUNCESTON v NORTH HOBART
2.30pm UTAS Stadium

have it taken away from you, you want it even more.

"I know the players are looking forward to it, and I'm sure the supporters are as well."

Glenorchy coach Paul Kennedy said players and fans were champing at the bit for footy.

"It has been the longest wait for the season and it has happened all in a rush," Kennedy said.

"Most of us were thinking late July or early August for the start, and then that became July 18 and all of a sudden July 11."

"We had two weeks' notice that we were on, but it has been great and I know the players are ready and the supporters are ready as well."

"Having footy will return a little bit of normality to our lives and if footy can open up the door for people to get out and enjoy something that will be a big kick-along for everyone," he said.

lockdown and they're looking a little bit of normality to our lives and if footy can open up the door for people to get out and enjoy something that will be a big kick-along for everyone," he said.

"It has been doom and gloom, everyone has been in

"It's like anything – you

As our borders re-open and we ready ourselves to resume travel once again, we want to assure you that we have put measures in place to promote safe travel.

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We're ready when you are and look forward to seeing you soon.

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13 TSL PLAYERS TO WATCH

The cancellation of a number of competitions around the country has seen all State League clubs secure some high-profile recruits, and **ADAM SMITH** lists his 13 players to watch — a combination of new faces, rising talent and established stars.

Jaye Bowden (Glenorchy) While he is nearing the end of his playing days, he remains a dangerous force with an ability to impact the scoreboard as well as rack up possessions through the midfield.

Jackson Callow (North Launceston) The high-flying Bomber will be eager to impress in the hopes of catching the attention of any AFL recruiters with no Devils program this year.

Sam Collins (North Hobart) Collies is considered one of the strongest Tasmanian draft hopes this year. The rebounding defender can keep his name in the mix with a strong TSL campaign.

Nicholas Connors (Lauderdale) Connors hosted a premiership-winning goal from 50m with just two seconds left in the Gerringong Football League in 2019. With the GFL not going ahead in 2020, Lauderdale swooped on the flag hero.

Brad Cox-Goodyer (North Launceston) In the past few seasons Cox-Goodyer has claimed the mantle as the TSL's best player. The lethal left-footer can do it all.

Josh Green (Clarence) There will be few players in the competition this season who have a better goal sense than Green. Twice Brisbane's leading goal kicker, the exciting

small forward returns to the Roos after booting 132 goals in TSL matches for the Lions and Essendon.

Job Harper (Launceston) The Blues skipper remains in the upper echelon of midfielders and finished equal runner-up in the Lynch medal count last year.

Kieran Lovell (Tigers) Returned to his junior club last year after stints with Hawthorn and in the VFL and made an immediate impact with a runner-up finish in the league best and fairest.

Josh Ponting (North Launceston) In a side brimming with top-level talent, Ponting has emerged as a bona fide star.

Fletcher Seymour (Launceston) A multi-sport talent, Seymour — once a Tigers cricket rookie — ditched the bat and ball to focus on football last season and reaped the rewards.

Sam Stegnes (Lauderdale) Arguably the most flexible player in the league. At 194cm can easily hold down a key position post at either end of the ground and has proven his credentials as a mobile ruckman.

Patrick Walker (North Hobart) One of a dozen Devils on the Demons list, Walker will be aiming to transition solid junior numbers into senior TSL level.

Mackenzie Wills (Tigers) Boom recruit for the Tigers, benefitting from the NEAFL competition not getting underway this season. Brings more AFL experience to the club, having played five games for Gold Coast in 2015.

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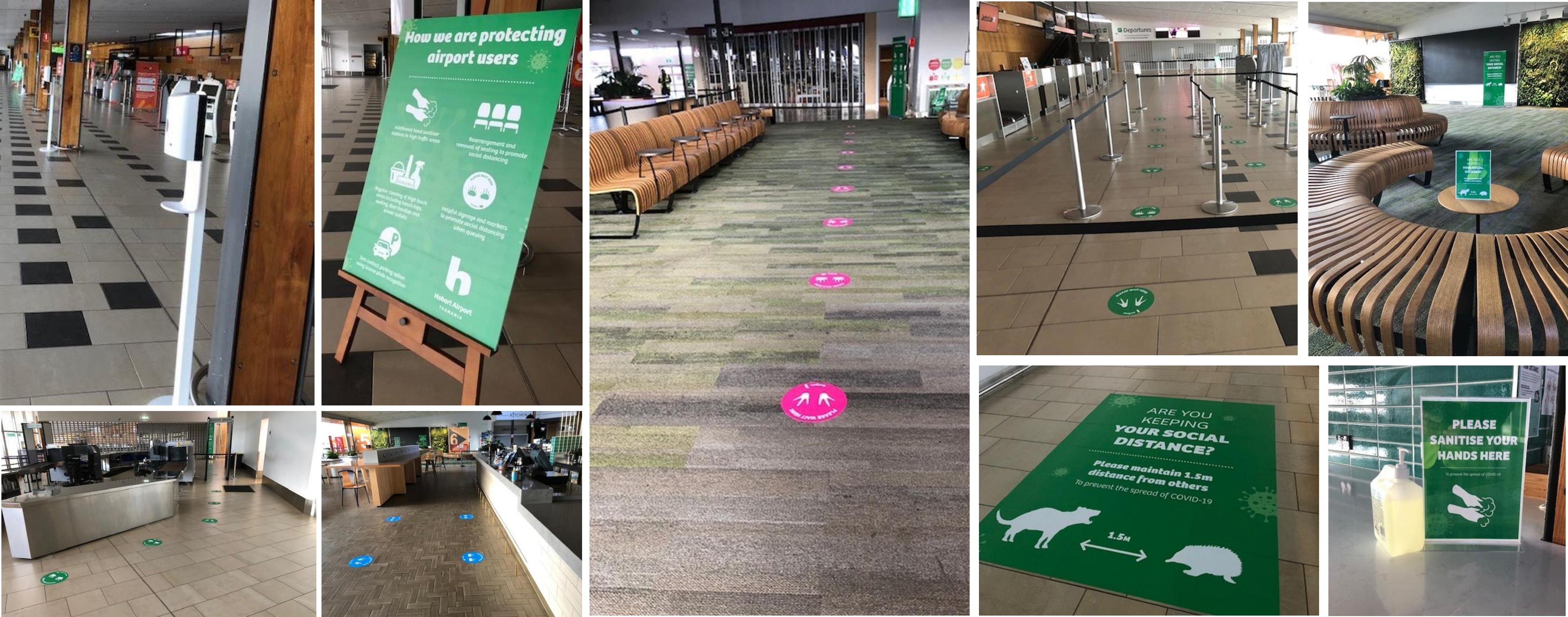
Digital



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Signage



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Stimulating Demand



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A wide-angle photograph of an airport runway at sunset. A large commercial airplane is captured in mid-takeoff, its landing gear still deployed. The runway is a dark strip of asphalt with white and yellow markings, surrounded by green fields and trees. In the background, a range of mountains is visible under a sky filled with scattered clouds. The sun is low on the horizon, casting a warm, golden glow over the scene. The overall atmosphere is one of travel and adventure.

Hobart Airport will play an important role in Tasmania's economic recovery through domestic and international flights, freight and Antarctic opportunities.

Recovery

Domestic Recovery

- Heavy engagement with airlines, and Government
- Recovery of pre-existing routes the key
- COVID-Safe States important
- Playing our part in the economic recovery
 - Island hopping
- New opportunities
 - Canberra
 - New routes?



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Recovery

The ‘Trans Tasman’ Bubble

- An economic study completed prior to the impact of COVID-19 found that international flights into Hobart, including New Zealand, could increase tourism spending by up to \$120 million per annum, creating an additional 600 (FTE) direct jobs.
- Seizing the opportunity of welcoming passengers directly to Tasmania from New Zealand will be extremely beneficial to the state’s economic revival, creating jobs and investment to ensure our future growth.



Connecting Communities



Diversifying our Portfolio

Freight

Recent discussions suggest that there is an interest in dedicated, wide body aircraft operating to and from Tasmania to move produce from the State to domestic and international ports. This would increase the role of air freight, particularly in meeting export demand for high value, time-sensitive products.



Diversifying our Portfolio

Antarctic Operations

Tasmania is the Antarctic gateway for Australia and Hobart Airport is home to Australia's Antarctic Aviation Programme.

The recent Hobart City Deal suggests a bolstering of capability in Hobart to provide further support for Antarctic operations into the future, and ensure Hobart is maintained as the Australian Antarctic Gateway.

There is also opportunity to potentially attract other countries involved in Antarctic exploration.



Diversifying our Portfolio

The Hobart Airport Precinct

- Freight Handling Facility 50% tenanted, with new Federal Government tenant commencing a lease shortly.
- New business opportunities being progressed with State Government proponents.
- Draft Property Strategy has been prepared that will assist to guide the evolution of Hobart Airport's non-aero development opportunities.



Master Plan

and TXP



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The Future

- Our Major Development Plan for the terminal expansion was approved in late 2019.
- Like many other businesses, Hobart Airport has been impacted significantly by the COVID-19 pandemic.
- The dramatic drop in passenger numbers and the reduction in flights has meant that we have had to review our plans for expanding the terminal.
- We want to convert on any opportunity to grow the network for Tasmania
- We will ensure that we have facilities in place to convert on domestic and international opportunities
- We received a 12-month extension for our Master Plan which will be reworked and released in 2021
- We look forward to sharing our development plans in due course.



Thank you



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