



# Tourism Tasmania's International Market Approach

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# Introduction

*The global tourism landscape is increasingly competitive. Destinations are investing in their tourism offering and finding exciting ways to reach and engage with potential visitors. These visitors are spoiled for choice, and the target of an ever-growing number of destinations.*

Within this context, Tasmania must take a focused and smart approach to its efforts to attract visitors to the state. As the Tasmanian Government's destination marketer, Tourism Tasmania is responsible for encouraging more leisure travel to Tasmania, and better air and sea access to support this.

International visitors are an important focus for Tourism Tasmania's marketing and the future growth of Tasmania's visitor economy.

To this end, Tourism Tasmania recently undertook a comprehensive review of its international marketing operations and activities, to ensure it is engaging in markets with the best prospects for Tasmania and investing in marketing and other activities which will best position the state to participate in the growth of global tourism.

The outcomes of the review have provided an opportunity for Tourism Tasmania to refresh its international market approach.



# Tourism 21 – The Tasmanian Visitor Economy Strategy 2015-2020

Tourism 21 – The Tasmanian Visitor Economy Strategy 2015-2020 (T21) continues a long-standing partnership agreement between the Tasmanian Government and tourism industry to grow Tasmania's visitor economy and in doing so, provide economic, social and cultural benefits for Tasmanians and their communities.

*The strategy seeks to grow annual visitor numbers to Tasmania to 1.5 million by 2020. More importantly, by doing so it aims to generate visitor expenditure of around \$2.5 billion a year, encourage more regional dispersal and create more tourism jobs.*

**The Government and industry are collectively focused on achieving the T21 goals by addressing four priorities:**

- Generating more demand for travel to Tasmania
- Growing air and sea access capacity
- Investing in quality tourism infrastructure
- Building capability, capacity and community

## Tourism Tasmania's Role

Tourism Tasmania contributes to the fulfilment of the T21 strategy by investing its marketing resources to encourage more leisure travel to Tasmania, and better air and sea access to support this.

We fulfil this role by connecting people culturally and emotionally to Tasmania through domestic and international marketing programs that lead and activate the Tasmanian brand, and grow economic and social value.



**International leisure visitors being targeted**

## The importance of international visitors

Visitor growth in recent years has kept Tasmania on course to meet the T21 goals. However Tourism Tasmania will need to attract even more leisure visitors from international source markets if it is to sustain the rate of leisure growth required to meet its 2020 targets.

Tourism Tasmania's goal is to increase the number of international leisure visitors coming to Tasmania from 215 000 in 2016 to around 241 000 by 2020.

*Leisure visitors are high-value visitors. They are more likely to stay longer, spend more, do more and explore our regions.*

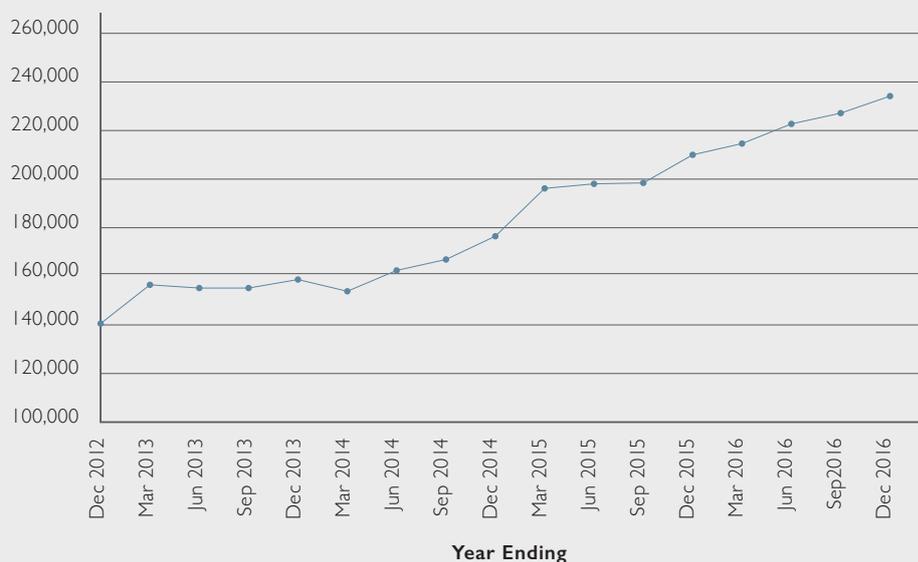
International visitors currently make up around 16 per cent of all visitors to the state. Tourism Tasmania's long-term target is to increase international leisure visitation to Tasmania as a proportion of the total.

Growing international visitation will contribute to the T21 goals and help 'future proof' the Tasmanian tourism industry. A diverse regional and more balanced visitor portfolio will also help balance the state's current reliance on the domestic market and the local economic conditions that influence it.

In 2016, Tasmania welcomed almost 77 000 more international visitors than three years ago. This strong growth also mirrors Australia's recent growth rate and provides a positive environment for targeted international marketing activity.

### International visitation to Tasmania

#### Visitors



(Source: International Visitor Survey, Tourism Research Australia)

# International Markets Review

Tourism Tasmania has undertaken a comprehensive review of its international operations to ensure it is engaging in markets with the best prospects to achieve its goals.

*The broad focus of Tourism Tasmania's marketing efforts in international source markets is to build on the awareness of Tasmania as a travel destination, to increase conversion from awareness to purchase and to enhance existing and build new relationships with key partners.*

The review sought to confirm the highest priority international markets for Tasmania, and highlight opportunities to enhance Tourism Tasmania's international operations and activities.



## Identifying the highest priority international markets

The review undertook a detailed assessment of Tourism Tasmania's key international source markets as well as new and emerging markets. The assessment included several elements including analyzing source market size and spend, growth and market share, product match, current and future access, maturity, dispersal and future demand.

The initial assessments were then further tested against three specific factors: future demand, source market size and the desire for Tasmanian tourism products.

The future demand profile (along with the anticipated size of the market) was a key consideration in ensuring that Tourism Tasmania's efforts yield the best outcomes for the industry and the state.

The fit between Tasmania's tourism offering and customer needs and interests was also a key consideration in identifying Tourism Tasmania's potential source markets.

### Identifying priority international markets



## Outcomes of the review

The review process confirmed the importance of Tasmania's existing priority international markets.

*A key outcome of the review was the identification of Tasmania's highest priority markets. These were North America, Continental Europe, Singapore, Hong Kong and China.*

The review also identified an opportunity to change the way Tourism Tasmania operates in international markets and ensure stronger collaboration and support between in-market resources and the Australian-based team.

# Working in International Markets

*The review revealed the opportunity and benefits for Tourism Tasmania in taking a differentiated approach across its priority international source markets.*

## Priority markets

### North America

In North America (incorporating the United States and Canada), a Tasmanian Marketing Manager will be embedded within the operations of Tourism Australia. The Marketing Manager will be jointly supported by Tourism Tasmania (Hobart) and Tourism Australia.

This first of its kind partnership with Tourism Australia will enable Tasmania to benefit from Tourism Australia's significant network and spend in the market, be proactive with trade and other partners, and be responsive to new PR and media opportunities. It also reinforces to those markets, their importance to Tasmania through this continued presence and investment.

As visitors from North America generally do not visit Tasmania exclusively, Tourism Tasmania will also work closely with Tourism Australia in marketing Australia and ensuring Tasmania features strongly in their Australian itineraries.



## Asia

Tourism Tasmania will engage dedicated country managers in Hong Kong, China and Singapore to service its priority Asian markets, with Singapore being used as a hub for other significant SE Asian countries like Malaysia and Indonesia.

The approach in these markets is to have individual country managers empowered to adapt and customise content to meet the needs of their respective markets, and supported directly by the team in Australia. This will ensure greater consistency in content and brand messaging, and align efforts around channel management.

The direct working relationship between the country managers and the team in Australia will ensure that the needs of these markets are considered in the early stages of any marketing initiatives thereby bringing greater efficiencies across Tourism Tasmania's domestic and international marketing efforts.

## Continental Europe

In Continental Europe (focusing on Germany, France and Switzerland), a Tasmanian Marketing Manager will be embedded within the operations of Tourism Australia. The Marketing Manager will be jointly supported by Tourism Tasmania (Hobart) and Tourism Australia.

This first of its kind partnership with Tourism Australia will enable Tasmania to benefit from Tourism Australia's significant network and spend in the market, be proactive with trade and other partners, and be responsive to new PR and media opportunities. It also reinforces to these markets, their importance to Tasmania through this continued presence and investment into those regions.

As visitors from key markets in Continental Europe generally do not visit Tasmania exclusively, Tourism Tasmania will also work closely with Tourism Australia in marketing Australia and ensuring Tasmania features strongly in their Australian itineraries.



## Supporting the in-market representatives

*To support its international marketing approach, Tourism Tasmania's Australian-based team structure will alter to better align its effort and activities. Dedicated resources will support the staff embedded with Tourism Australia in western markets and its representatives in Asian markets.*

There will also be a dedicated person working with Tourism Australia on the Aussie Specialist Program, ensuring the most up to date and contemporary Tasmanian tourism content is dispersed globally, together with webinars and market specific product updates.

A number of sales and marketing activities will continue to be coordinated from Hobart to support locally-based marketing and industry-led programs and to support initiatives across our rest of world markets.

## Moving beyond trade-based marketing

*The review also confirmed an opportunity to broaden the operational focus of in-market teams. While deep engagement with the trade will remain critical to success, further emphasis on PR, media and partnerships will provide new opportunities for Tasmania.*

The evolved international marketing approach will embrace a more brand-aligned content strategy nuanced by market, using trade-based marketing, digital, social, PR and other media opportunities. This will amplify Tasmania's market profile in the priority markets, build our brand awareness and convert the increased awareness and interest into travel to Tasmania.

The mix of activities undertaken will vary across different markets based on the maturity of the market and specific needs of the trade, consumers and partners.

## Other markets

*Tourism Tasmania's efforts will continue to extend beyond the priority markets listed earlier. Partnerships with airlines and other key travel intermediaries, like TripAdvisor, will enable Tourism Tasmania to deliver targeted activity in other important markets, such as the United Kingdom and New Zealand.*

Tourism Tasmania will also continue to invest in programs facilitated by Tourism Australia such as the Australian Tourism Exchange (ATE) and the Aussie Specialist Program (ASP) which allow tourism operators to connect with the trade across a broad set of source markets. Consumer-focused initiatives including social media, PR and media hosting will also be used to extend our reach.

The Australian based international team will continue to engage with markets, including but not limited to the United Kingdom and New Zealand, with targeted sales calls and partnership activity.

This includes the ongoing evaluation of global trade and media tourism events to ensure a full calendar of visiting international journalists, influencers and key distribution partners is maintained to not only show first-hand the tourism offering in Tasmania, but introduce new stories and opportunities.

