



TASSIE TOURISM

masterclass



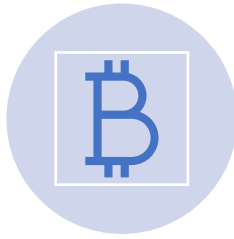
TASSIE TOURISM
masterclass

WEEK 1: GET TO KNOW OUR INDUSTRY
Presented by David Reed
Tourism 101, Markets and Tourism Strategies



THE BASICS

INTRODUCTION TO THE BUSINESS OF TOURISM



WHAT ARE THE VARIOUS
OPPORTUNITIES FOR
YOU?



ACCOMMODATION?
LARGE, SMALL, BOUTIQUE,
HOTEL, GLAMPING ETC



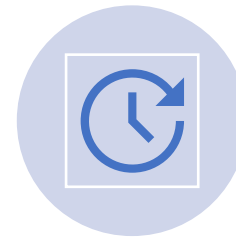
TOURS



LOCAL GOVERNMENT
ADVICE AND
INFORMATION



EXISTING BUSINESS OR
START UP



ALL SECTORS MAY FIND
THIS INTERESTING IN
SOME WAY

POST VIRUS AS AT MAY 2020

State border closures

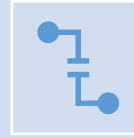
Airline collapses

International travel suspended indefinitely

Cruise ships as petri dishes

So what does the future hold?

LET HISTORY PAVE THE WAY FORWARDS



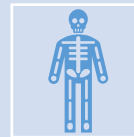
Let's dice up the market to understand the market segments. Who was coming to Tasmania prior to the virus?



Where did they come from? When did they arrive? Have they been here before? Are they on holiday? Do they bring kids?

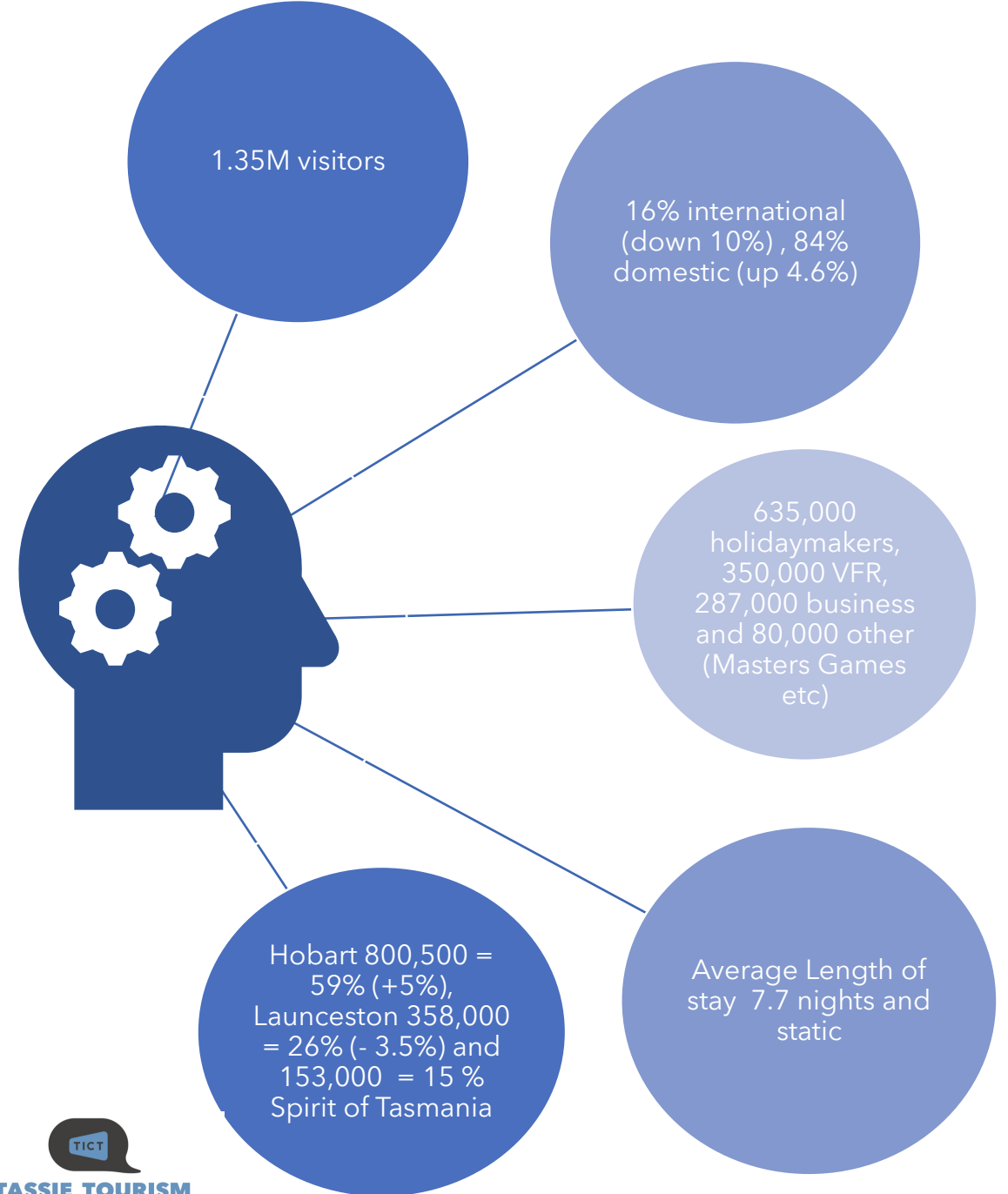


Who's unlikely to be travelling again soon?



Where will our recovery begin?

BASIC NUMBERS AS AT DEC 2019



WHAT'S THE SIMPLE TAKE OUT?



International may come back ... but after a reasonably long timeframe



Business is being done differently now - maybe less reason for travel in the future



Pent up demand in the VFR market will be hot when airline return



It was a "Hobart-centric" market - as the key driver - and will still be so

OTHER FACTORS

No Dark MOFO, no Festival of Voices...
winter could be especially challenging

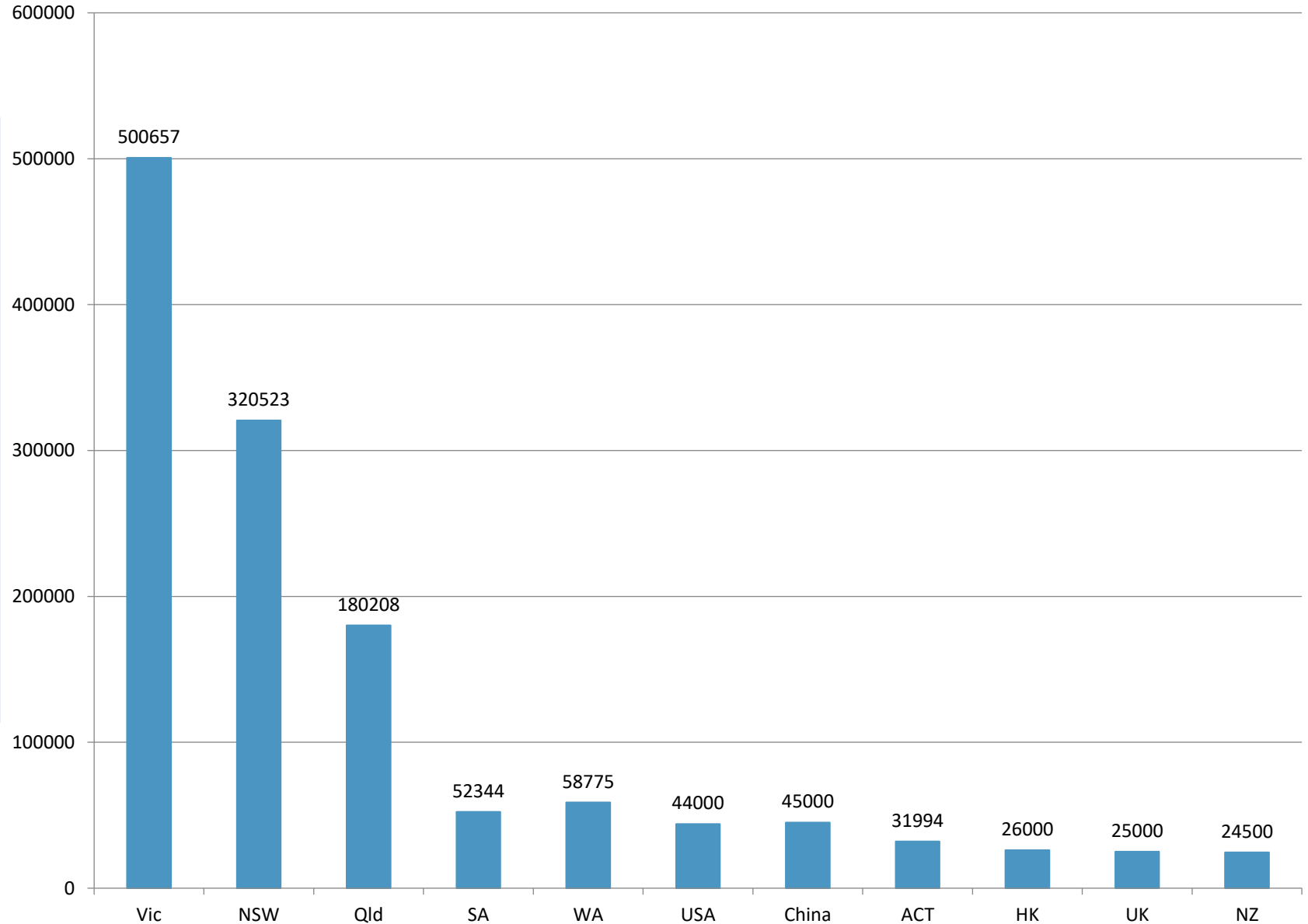
TT Line is ready and waiting to activate
their markets

Jetstar started out with Tasmanian routes
and is likely to re-start again with us - it's
a natural selection - so...

We could re-start before other states

So what did the market look like last
year?

Tas Visitor Origin 12 mths to Dec 2019



LUCKILY...

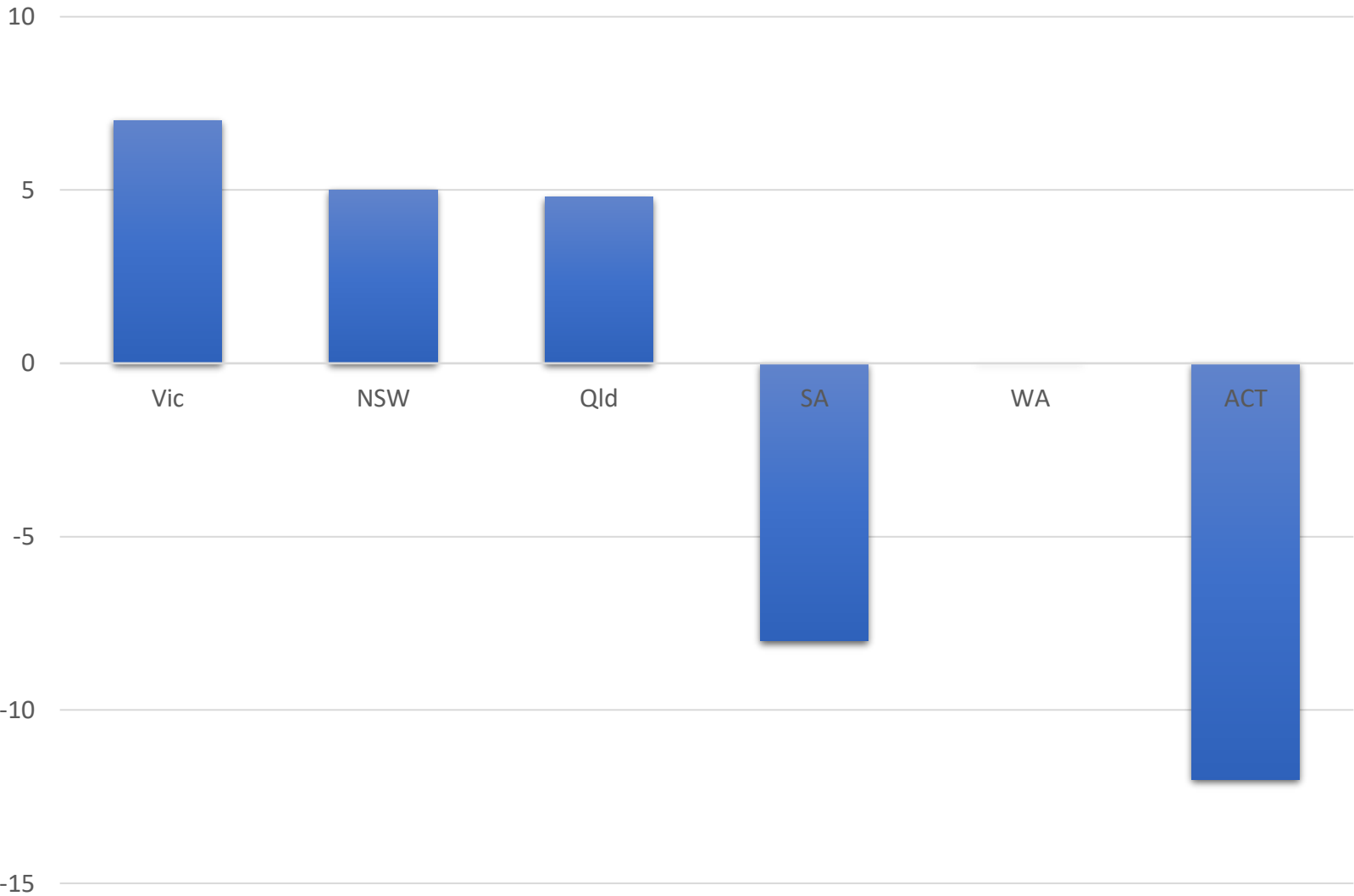
We are
predominantly a
domestic
destination (84%)

What was
happening with
those domestic
markets prior to
this pandemic?

How the markets were looking



Interstate markets - % change Jan to Dec 19



WHICH MARKETS ARE CHANGING?

500k Victoria (44%) +7%

320k NSW (28%) +5.5%

180k (16% QLD) +4.8%

SA 52K -8%

WA 58k 0%

ACT 32 -12%

SO WHAT?

We are so lucky that the vast majority of our visitors are coming from Victoria and it was growing at 7%

NSW was growing at 5% and Qld was at 5%

Driven by a number of factors – not the least of which was frequency, cost and capacity of air travel

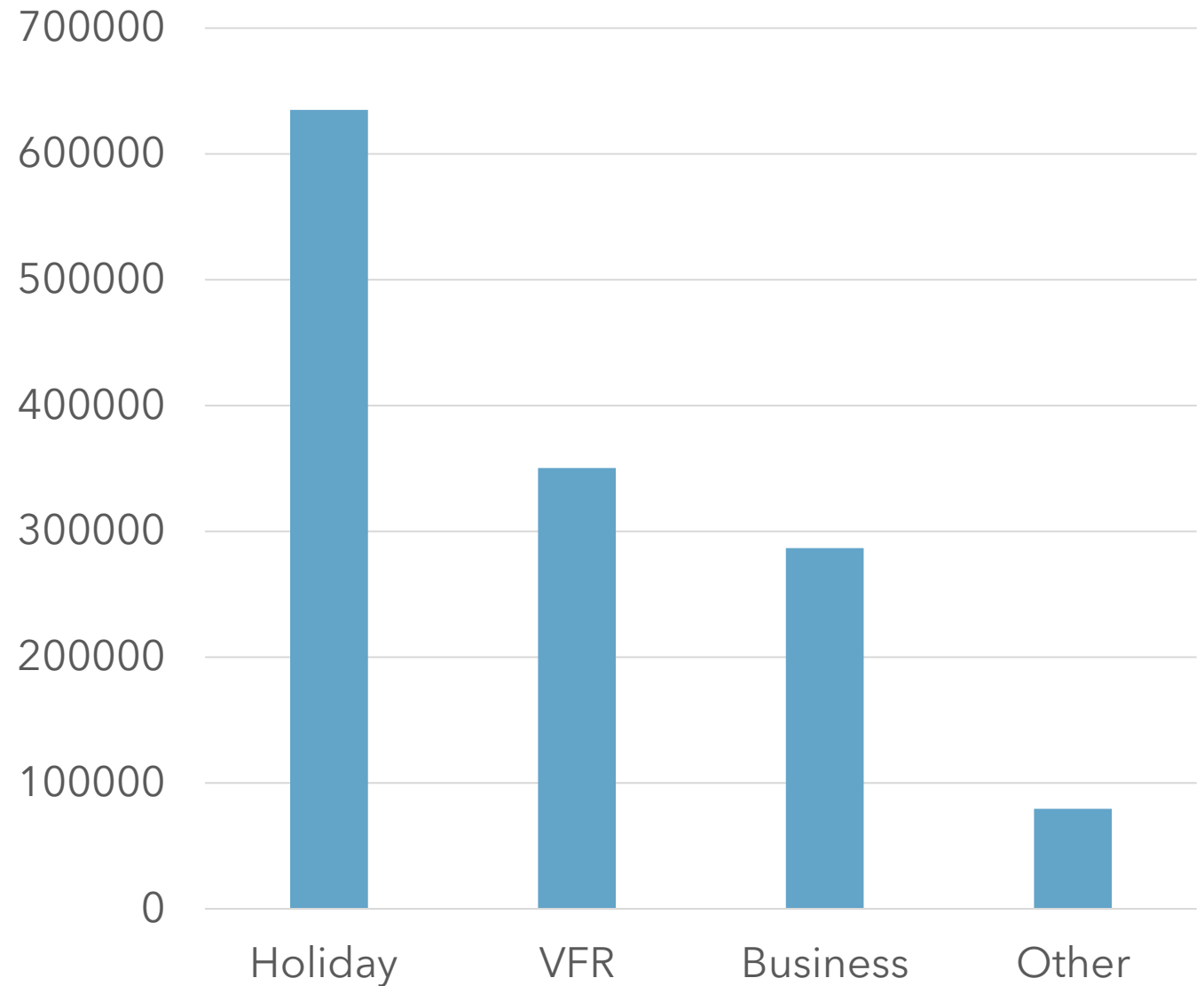
WHY ARE THEY COMING?



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Why people visited Tasmania 2019



MORE NUMBERS

939,000 have visited before
(32% already in 2019)

Amazing !

So who are we talking
about?

70 % are repeat visitors

33% with partners and only
11% with families



WHICH MEANS

We are not primarily a family destination



Most visitors have a very good idea of what Tasmania is all about (70% of them have been here before)



About half are on holidays and 27% are VFR



Their trigger to return maybe

Access (flight resumption
but new prices ?)

Family separations

unlikely the business sector
will rebound quickly (if ever)
back to its prior levels

EVEN MORE NUMBERS

Airbnb rose by 563% - from 166k nights FY 2016 to 936k nights in 2019

But how many have been taken out from the inventory back to long term rentals?

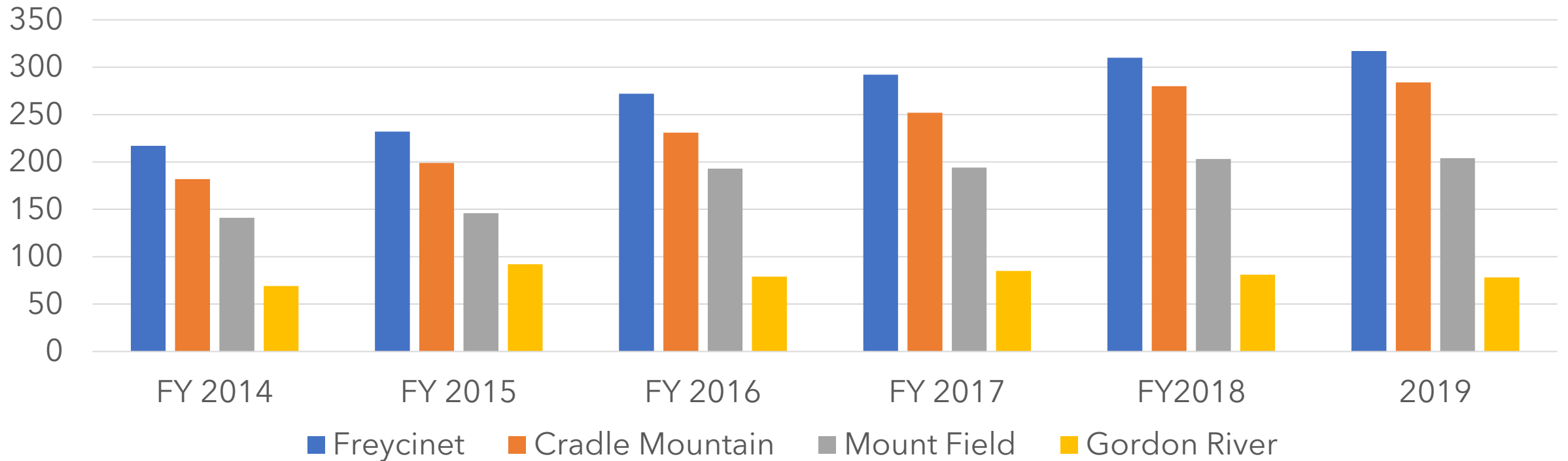
And is everywhere the same in growth?

The National Parks visitation shows some dispersal details



PARKS SHOW DISPERSAL

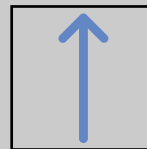
Tasmanian National Parks Visits



TASMANIANS THE PRIMARY FOCUS



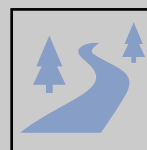
The last survey in 2018 - we took 1.43m overnight, intrastate trips



Growing at 10% pa



It's big business - let's say from 500,000 total population, 400,000 people travel somewhere intrastate each year



They would take 3.5 overnight trips each year.

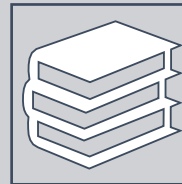
WHERE CAN YOU GET ALL THIS STUFF?



International is Tourism
Research Australia
website



Tasmanian data is the TVS
analyser on Tourism Tas
corporate website (Dr
Allison Anderson)



Try the University of
Tasmania, Tourism Studies
- Dr Anne Hardy

THE MANAGEMENT OF TASMANIAN TOURISM

THE STATE GOVERNMENT LEVERS

- Starting at the top... Premier for Tourism, Peter Gutwein
- Minister for State Growth (Roads, infrastructure, Events. Supply) Michael Ferguson
- Minister for Environment and Parks (Roger Jaensch)
- Minister for Arts and Heritage (Elise Archer)
- The Governments shipping line
 - TT Line - CEO, Bernard Dwyer

THE BROADER TOURISM INDUSTRY

TOURISM AUSTRALIA

Promotes Australia as a tourist destination



TOURISM TASMANIA

Promotes Tasmania as a tourist destination



REGIONAL TOURISM ORGANISATIONS

Promotes one of four TAS regions



VISITOR CENTRES & TOURISM ASSOCIATIONS

Promotes their local region



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THE MANAGEMENT OF TOURISM



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2 sides - Demand (getting people to visit - making promises) and Supply (delivering on the promises we made to get them here)

DEMAND = Tourism Tasmania and Tourism Australia

Brand development,
Awareness and
intention

National and
International

Partnerships

Access

WHAT DO THEY BOTH ACTUALLY DO?



Build awareness - people read about us, see ads about us, social media raves about us, carriers make offers to us, spruiking ambassadors for us and talking everywhere - that's what Tourism Tasmania and Tourism Australia are all about



Create a desire to travel



Tourism Australia only market internationally - Tourism Tas do both domestic and international

TOURISM AUSTRALIA



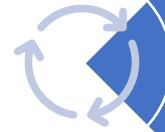
- Supply latest industry statistics.
- Keep you informed of marketing activities across the globe.
- You can leverage off their marketing campaigns.
- Keep you informed of industry news and updates.



TOURISM
AUSTRALIA



TOURISM TASMANIA



Their role is to create demand for travel to the state by connecting people culturally and emotionally to Tasmania



What can do they do for you?

- Marketing Campaigns
- Research
- Keep you informed of industry news and updates
- Provide an image gallery
- Manage ATDW



tourismtasmania.com.au (corporate)



discovertasmania.com (visitors)



Tourism
Tasmania



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TOURISM TAS LATEST CAMPAIGN

The State's evolved **tourism** brand **Tasmania- Come Down for Air** invites travellers to take a break from the stress and routine of their everyday lives.

When everywhere can feel generic - our potential visitors are being encouraged to feel more human on an island of difference.



NORMALLY WE THROW
THE TIDDLERS BACK



Flinders Island Food
and Crayfish Festival
Flinders Island

discovertasmania.com.au/air

TOURISM TASMANIA INTERNATIONAL MARKETING

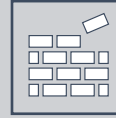
They work in close partnership to deliver campaigns, trade engagement, training programs and media/PR activities

Work closely with Tourism Australia on:

- Cooperative campaigns and programs eg Restaurant Australia, Coastal & Aquatic campaign
- Trade engagement and training programs including trade shows and events within Australia and in the international markets.



THE MANAGEMENT OF TOURISM



SUPPLY



The Visitor Experience, the capacity, the product development, roads, signage - all within Department of State Growth. Jacqui Allen



As is Events Tasmania - supporting a vital ingredient



Co-ordinator Generals Office - for new and mixed developments



Parks and Wildlife - Manager Visitor Strategy. The agency with our major product.

STATE GROWTH

www.business.tas.gov.au

- Online Tasmanian government resource for all small Tasmanian businesses
- Portal to a wide range of business resources & tools
- Digital Ready Program - digitalready.tas.gov.au
- Business Enterprise Centres - www.enterprisecentres.tas.gov.au
- Mentoring Service
- Grants administration and information
- Subscribe to e-newsletter
- Small business forums



**Tasmanian
Government**

TOURISM PEAK BODIES

- Tourism Industry Council Tasmania (TICT)
 - Accreditation and star ratings
 - Industry Leadership and political lobbying
 - Conference and professional development
 - Some 1,100 tourism operator members statewide
- Tasmanian Hospitality Association (THA)
 - Membership around 400 - Hotels, Motels, Clubs and pubs
 - Workforce development, skills training in sector
 - Political lobbying
 - IR and HR support



OTHER TOURISM ORGANISATIONS

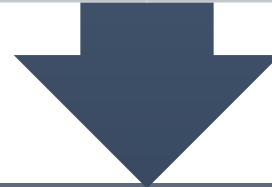
RTO's

4 around the state -
various membership and
operating models

Supported by government,
councils and industry

local brand identity, local
events, local marketing

DAP initiatives and a focus
on the major role of Local
Government investment



LTA's, Chambers of Commerce, Progress and Development Organisations



REGIONAL TOURISM ORGANISATIONS (RTO'S)

What can they do for you?

- Keep you informed of marketing activities
- Work collaboratively to achieve greater marketing reach.
- Keep you informed of industry news and updates
- Industry development opportunities



Tourism
Northern
Tasmania



DESTINATION
SOUTHERN
TASMANIA



TICT
TASSIE TOURISM
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east coast
tasmania



WEST BY
NORTHWEST

LOCAL TOURISM ORGANISATIONS LTO'S ALSO KNOWN AS LTA'S

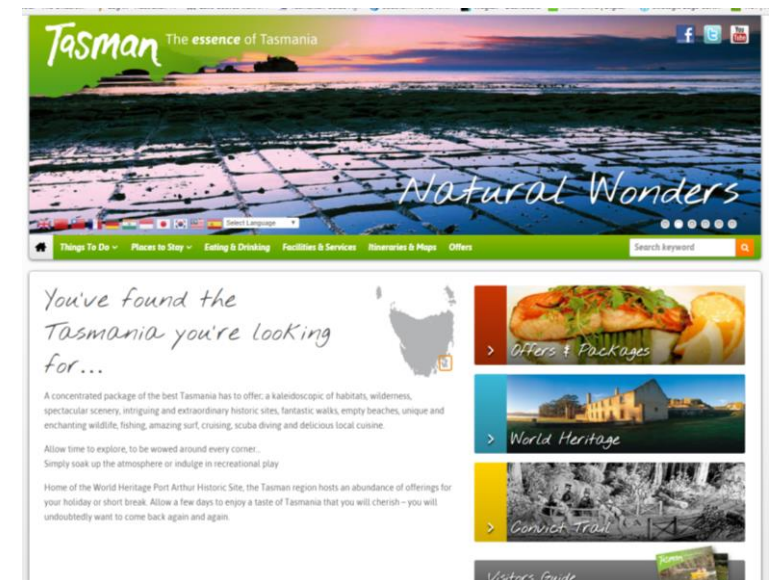
Tasmania also has many LTO's within the RTO regions that work with local tourism businesses on marketing and representing their sub region.

Example

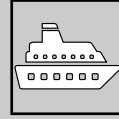
- Port Arthur and Tasman Tourism Association (PATTA) promotes the Tasman Peninsula
- LTVTA represents industry in the Launceston and Tamar Valley
- Or ask your RTO for the contact details of your most appropriate LTA



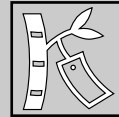
southern
trove
Experience the treasure.



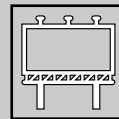
HOSTS OF OTHERS ASSIST IN TOURISM



Cruise Ships - (Cruise Australia)



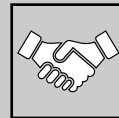
Heritage Tasmania



Brand Tasmania



Tourism Research Australia - NVS



Business Events Tasmania

BUSINESS EVENTS TASMANIA

WWW.BUSINESSEVENTSTASMANIA.COM.AU

- Peak organisation for the business events sector in Tasmania
- Convention Bureau, incorporated, not for profit, sales and marketing organisation
- Primary role to market Tasmania's business event credentials nationally & internationally and work with local industry and event planners to bring business events into the destination.
- MICE industry (Meetings, incentives, conferences and exhibitions/events)
- 187 members



Business Events
Tasmania



TOURISM VISITOR INFORMATION CENTRES (TVIC)

Located throughout the state, provide information on the destination, accommodation, attractions, activities, and tours in their local area.

What can they do for me?

- Promote and sell your product (15% commission)
- Provide opportunities to advertise your product (brochure display, video, posters etc)
- www.startwithi.com.au



TASMANIAN

BRAND TASMANIA

New Act 2018

New chair - Nick Haddow from
Bruny and new Board

The power of Place Branding

www.tasmanian.com.au

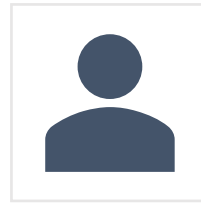


WHAT HOLDS ALL THIS TOGETHER?



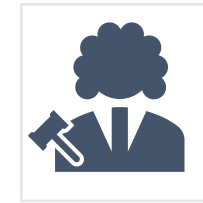
Tourism 21

Agreed parameters, whole of government, Industry/ Government partnership, agreed targets, bi-partisan



Parks 21

Management of commercial practices, licensing of operators



Protocol Agreement

Agreement of dispute mechanisms between TICT and State Government.

QUALITY EXPERIENCE



How do we get better at what we do?



What is quality leadership?



Do we aspire to be a better destination than most?



Is it a Tasmanian thing to be different?

QUALITY TOURISM FRAMEWORK



TASMANIAN TOURISM AWARDS

Pinnacle Tourism Awards Program in Australia

Winners from Tasmania become finalists in the Australian Tourism Awards

Submission based, site visit for verification

State winners submission re-judged by a different set of national judges



THE SYMBOLS OF QUALITY

Display the Quality Tourism logo

Display the Tasmania Quality Assured logo, incorporating the Brand Tasmania mark

The Quality Tourism logo will automatically display on your Australian Tourism Data Warehouse (ATDW) listings, which supply to over 150 websites worldwide including

discovertasmania.com

australia.com

qualitytourismtas.com.au

trustthetick.com.au.



MANAGING YOUR REPUTATION



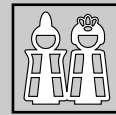
Streamline
Operational
Improvements

Guarantee
Service
Excellence

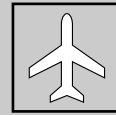
Improve
Guest
Satisfaction

Boost
Rankings
& Revenue

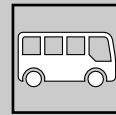
TRADITIONAL DISTRIBUTION



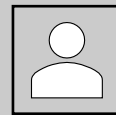
TOURIST sees footage of beautiful Tasmania on the TV and through his friends and decides to find out more...



Tourist visits local RETAIL TRAVEL AGENT, ends up booking a thorough 8 week adventure including accommodation, tours and activities...



Travel agent plans comprehensive TAS itinerary through the brochure of a TOUR WHOLESALER and books itinerary through them...

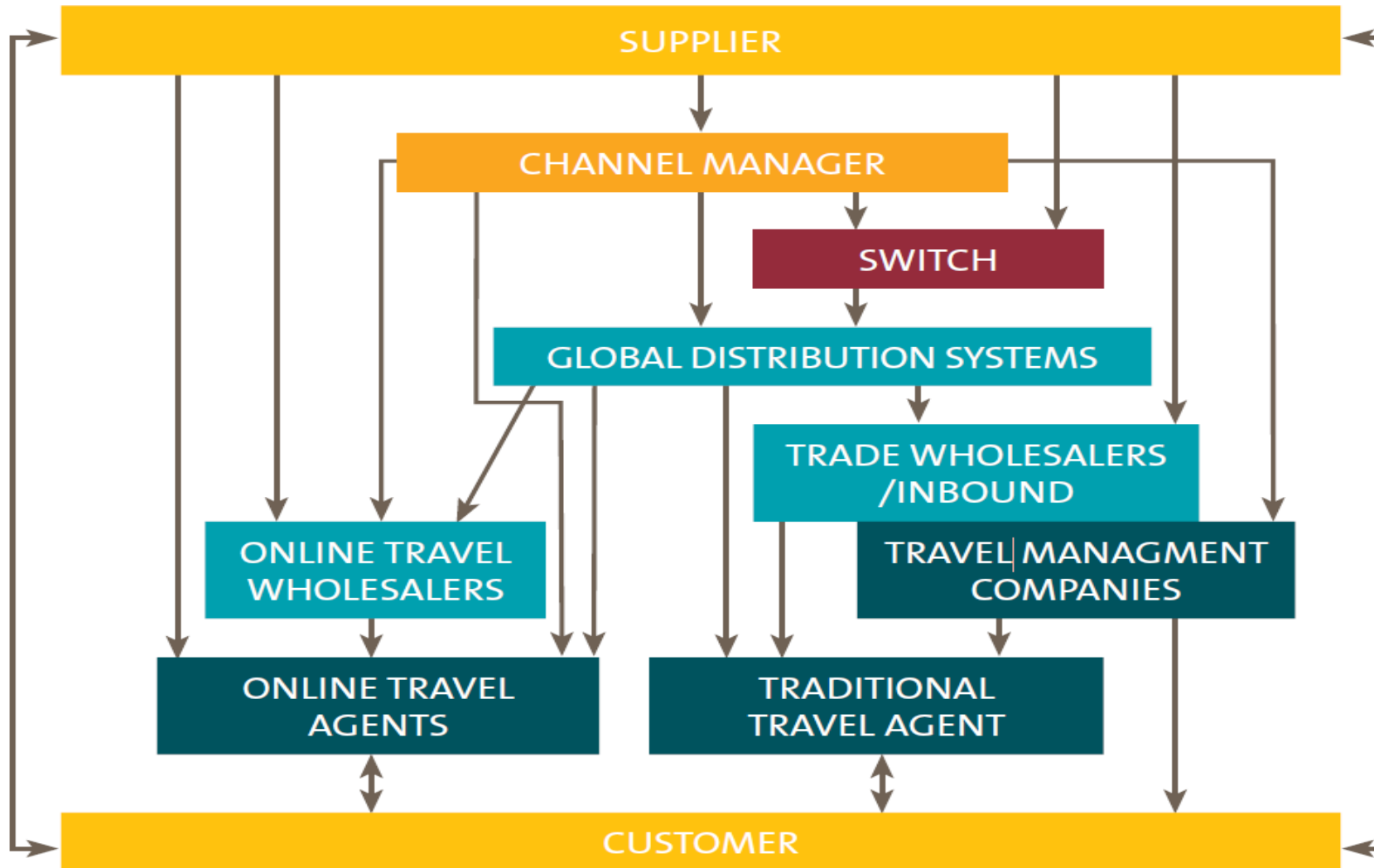


Tour Wholesaler contacts an INBOUND TOUR OPERATOR (ITO) to book each individual element of itinerary...



The Inbound Tour Operator contacts individual LOCAL TOUR components directly..

DISTRIBUTION TODAY - DISRUPTORS



THANK YOU

CALL DAVID 0419 394362

OR EMAIL
david@reedconsulting.com.au



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Tourism Industry Council Tasmania