



Asia Engagement Marketing Strategy

June 2016

Table of Contents

Executive Summary	4
Background.....	5
The Project Objective.....	7
Tasmania’s Current Market Positioning and approach	7
The Visitor Experience.....	7
International Market Overview	7
China.....	8
Distribution.....	8
The Chinese Traveller Snapshot.....	9
The Marketing Approach	9
Content.....	9
Brand Advocacy.....	9
Strategic Partners for Conversion.....	9
Hong Kong.....	10
Distribution.....	10
The Hong Kong Traveller Snapshot.....	10
The Marketing Approach	11
Content.....	11
Brand Advocacy.....	11
Strategic Partners for Conversion.....	11
Singapore.....	12
The Singapore Traveller Snapshot.....	12
The Marketing Approach	13
Content.....	13
Brand Advocacy.....	13
Strategic Partners for Conversion.....	13
Malaysia.....	14
The Malaysian Traveller Snapshot.....	14

The Marketing Approach	15
Content.....	15
Brand Advocacy.....	15
India.....	16
The India Traveller Snapshot.....	16
The Marketing Approach	17
Content.....	17
Brand Advocacy.....	17
Strategic Partners for Conversion.....	17
Indonesia	18
The Indonesian Traveller Snapshot.....	18
The Marketing Approach	18
Content.....	18
Brand Advocacy.....	18
Strategic Partners for Conversion.....	18
Japan	19
The Japanese Traveller Snapshot.....	19
The Market Approach.....	19
Content.....	19
Brand Advocacy.....	19
Strategic Partners for Conversion.....	19
Korea	20
The Korean Traveller Snapshot	20
The Market Approach.....	20
Content.....	20
Brand Advocacy.....	20
Strategic Partners for Conversion.....	20
Conclusion.....	21
Forward Projections.....	23
Summary of Market Focus Areas 2016 - 17.....	24
Appendix.....	25

Executive Summary

Tourism Tasmania has undertaken an analysis of its current engagement in the Asian region. Australian leisure arrivals and growth rates, review of each markets broader travel environment and visitor demographics, have been considered in the drafting of this marketing strategy.

The strategy will be reviewed on an annual basis and updated with year ending June figures to track longitudinal changes, as due to small sample sizes particularly in emerging markets more regular updates would provide considerable volatility in the results.

This analysis has identified the priority markets for Tourism Tasmania over the period 2016 – 2020 and has also outlined the most effective approach and focus for each market.

The key criteria for identifying these priority markets are:

- Alignment of Tasmania against the core appeals of each market as defined by Tourism Australia's Consumer Demand Project (CDP) research.
- Visitation factors including, growth, visitor spend and duration of stay as defined by the International Visitor Survey (IVS).
- Insights gained through Tourism Australia and Tourism Tasmania's in market representatives regarding more general travel trends and behaviours and economic factors within each market.

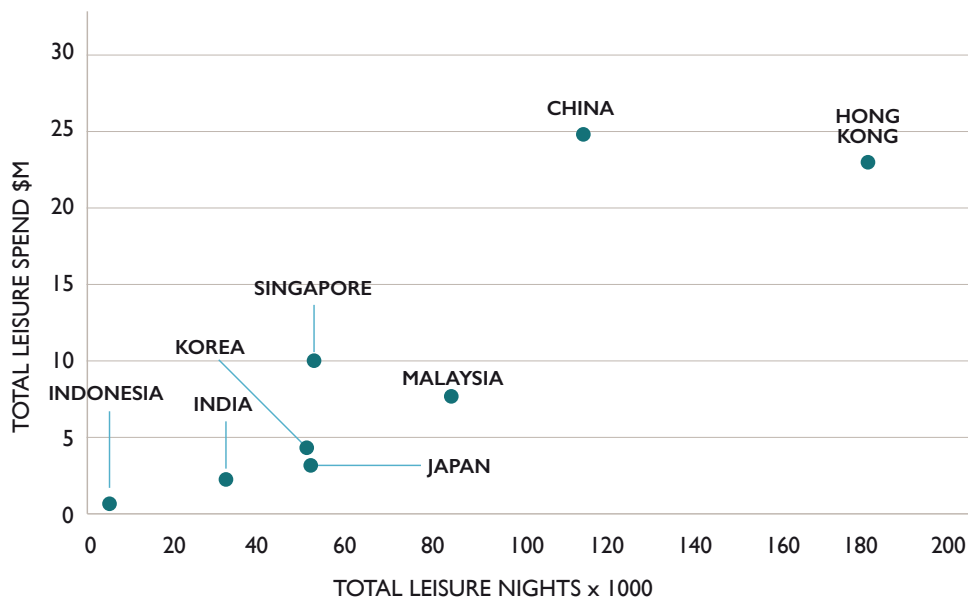
The core priority markets in the Asian region are:

- China
- Hong Kong
- Singapore
- Malaysia

These markets provide the strongest yield and growth opportunity. This review has also identified India and Indonesia as requiring watching briefs.

The table below provides a snapshot of the priority markets in regards to total visitation nights and spend.

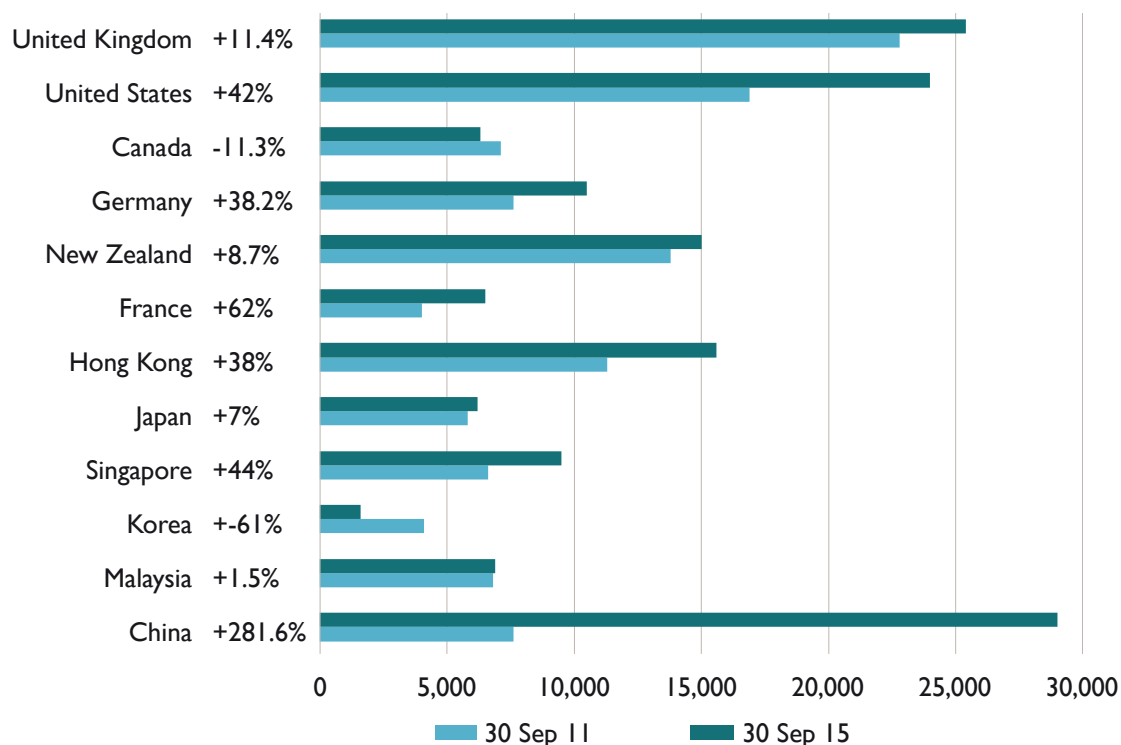
YEAR ENDING JUNE 2015



Background

Tourism Tasmania has been actively marketing to the Asian region for over 10 years, albeit with limited resources. The four key source markets of China, Hong Kong, Singapore and Malaysia represent around 5% (total 59 200) of Tasmania's total visitor arrivals, and 30% of Tasmania's total international visitors (198 300).

There has been a significant shift in the international arrival numbers to Tasmania from a five per cent decline in 2012 to 19% growth year ending June 2015 as demonstrated in the graph below.



Comparison of international arrivals to Tasmania by market 2012 - 2015

This graph shows that growth has been strongest in the markets where Tourism Tasmania has partner marketing programs and physical representation.

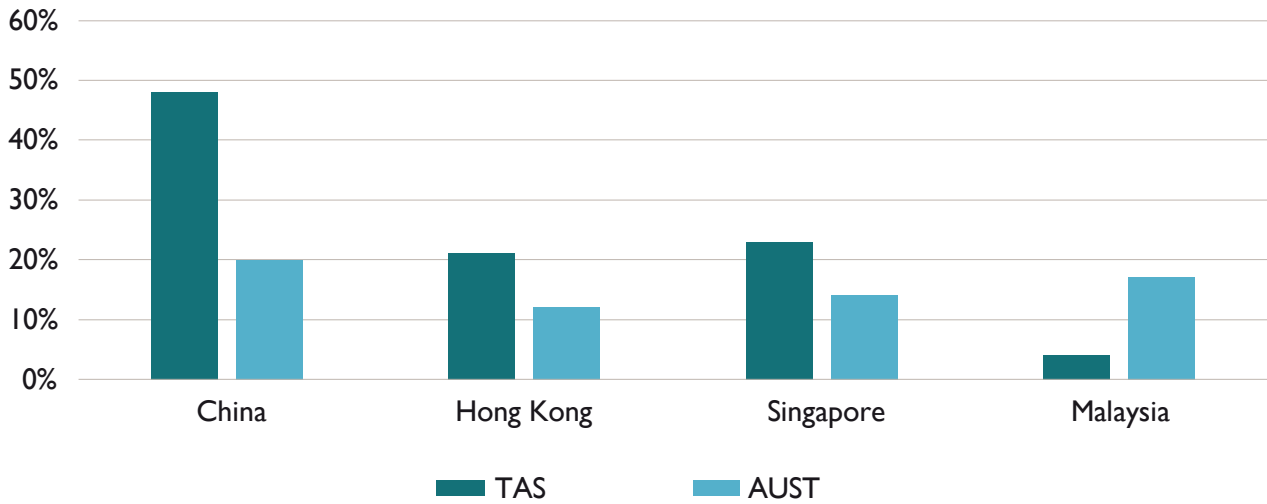
In 2013, Tourism Tasmania took a revised approach to its international marketing. At the time, international arrivals to Tasmania were in decline and the spend in international marketing was disproportionately high given that it provided only approximately 10 percent of total visitors to Tasmania. The review aimed at repositioning to align with the broad strategic need of the organisation.

This review had implications on the Asian region and resulted in a withdrawal of physical representation in the markets of Japan and Korea, and an increase in focus and resource in the Greater China and South East Asian markets of Singapore and Malaysia.

Overall, Tasmania's growth rate is almost double the growth rate to Australia over the same period (except Malaysia) as illustrated in the following graph;

Key Asian Source Markets – Australia compared to Tasmania

**Asian Leisure Visitor Growth
CAGR% 2012 - 2015**



The Project Objective

The purpose of this Strategy is to:

- Maximise targeted growth from maturing Asian markets.
- Test current strategy against macro environment and market travel and respond to changes in consumer travel patterns and behaviours.
- Align internal and market resource support for the Asian engagement strategy including new areas of focus and innovation such as airline and strategic partnerships.
- Assess emerging markets and respond strategically.

Tasmania's Current Market Positioning and approach

In the mature markets of Hong Kong and Singapore there is a trade focused strategy based on driving conversion, whereas in emerging markets of China and Malaysia, this approach is overlaid with a consumer direct approach to drive destination awareness.

Tourism Tasmania's targeted position in the Asian region is as a premium destination and is focused on affluent, high yield visitors, rather than volume. This strategy is focussed towards small group tourism and Free Independent Travellers and is underpinned by the destination's core appeals of nature, wildlife, produce and people.

The Visitor Experience

Tourism Tasmania is committed to the priority of generating demand for travel to Tasmania and will invest in commercial partnerships and cooperative marketing programs with international air carriers to grow capacity and demand to create access opportunities through this visitation. Through the T2I framework, the Tasmanian Government will support and enable industry associations, Regional Tourism Organisations, Business Events Tasmania and Brand Tasmania to continue to build capacity and capability within the industry.

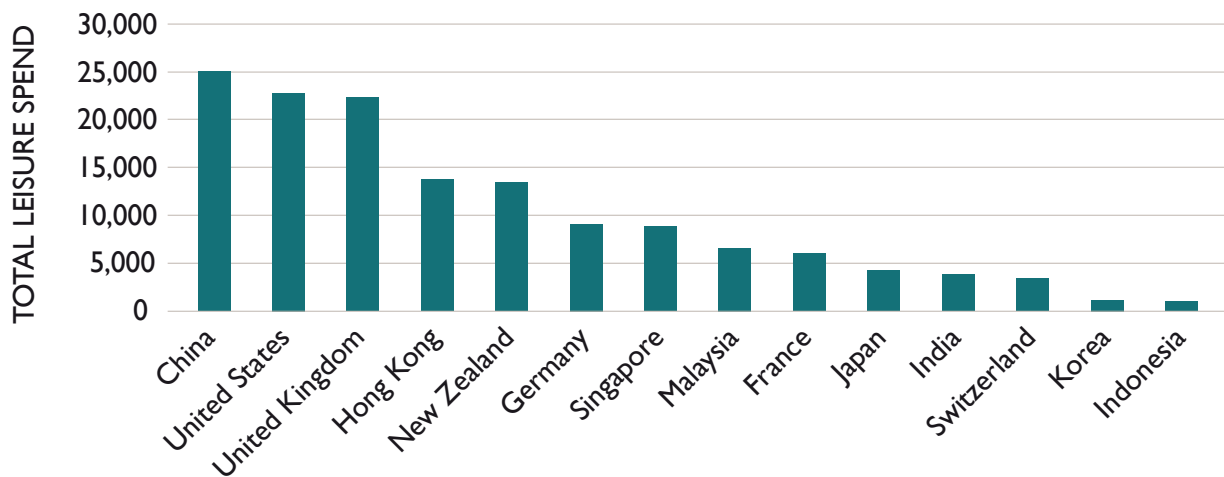
Where relevant, Tourism Tasmania will share insights in regards to the type of experiences sought by Asian visitors with the objective of ensuring satisfaction levels remain strong and the quality of infrastructure is meeting consumer expectations.

International Market Overview

As Tasmania continues to enjoy positive growth in international arrivals understanding key markets is imperative in order to meet the states visitor arrival targets.

Key Asia markets now represent well over 30% of the total international visitors to Tasmania and almost 40% of the leisure segment of the market.

Total Leisure Visitors to Tasmania YE June 2015



In order to be able to prioritise key growth markets a detailed understanding and analysis of each of these markets is required. The result will be a clear portfolio of priority Asian markets with an identified approach to growing visitation.

The following section of the document reviews each market to assist in informing how those markets are identified as priorities for Tasmania moving forward.

China

The rise of China on a global scale over the past five years has had a significant impact on trade, investment and tourism trends in Tasmania.



In the year ending September 2015, Tasmania exported goods to China, including Hong Kong, with an estimated value of \$652 million, comprising one quarter of the States total international exports.

China is one of Tasmania's major inbound source markets and represents a total of 16 per cent of total international leisure visitation to the State. Tasmania has experienced almost double the compound annual growth from China, compared with Australia overall, over the past five years, and although year on year growth is now trending downwards, the arrival numbers are anticipated to continue to rise.

The falling Chinese stock market has raised some concerns about the impact this could have on China's outbound travel to Australia. However, the impact is not expected to be significant, as only 6 to 9 per cent of the Chinese population are directly exposed to the stock market.

The Chinese economy is transitioning from being heavily reliant on investment and exports towards more sustainable growth, where household consumption takes up a stronger role. This transition has caused the growth to slow in recent years, and could lead to a depreciation of the Renminbi against major foreign currencies if household consumption does not increase strongly enough.

Tasmania is well positioned to leverage the growth from China as it aligns to the core appeals of the market. According to the Tourism Australia Consumer Demand Project, the top five most important factors for Chinese travellers when selecting a holiday destination are:

- World class beauty and natural environments (57%)
- Good food, wine, local cuisine and produce (46%)
- A safe and secure destination (45%)
- Rich history and heritage (34%)
- Spectacular Coast Scenery (27%)

Tasmania embodies these attributes and offers a refreshing destination within Australia for the mature Chinese leisure traveller.

Distribution

Although the travel distribution system in China is highly regulated, with more than 2000 travel agencies authorised to operate outbound travel business, coupled with the Approved Destination Status (ADS) scheme and China Tourism Law, independent travel is growing at a fast rate. The 'high quality' Tasmanian experience and infrastructure is well suited to this independent middle class traveller.

China *continued*

The Chinese Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 25,010 Chinese visitors arrived in Tasmania.
- Chinese leisure visitors spent approximately \$24 million.
- The majority of Chinese visitors came for a holiday (46%), followed by VFR (29%), Education (14%), business (9%) and employment (2%).
- Tasmania attracted approximately 3% of total Chinese visitors to Australia in that period.
- Average Leisure Spend per Visitor to Tasmania : \$957
- Average Leisure Spend per Night in Tasmania: \$210
- Average Length of Stay: 5 nights

The Marketing Approach

Tourism Tasmania will continue a 'full build' model in China. This approach incorporates the ongoing development of access and strategic partnerships, consumer and trade marketing campaigns as well as distribution development.

This includes the following pillars aligned with Tourism Tasmania's Strategy Map 2015 - 2020:

Content

- Progressive and dynamic digital and social platforms and underpinning strategy.
- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs and via their third party partnerships (.e.g Ali Barbar, Visa)
- Consolidated content plan through strategic partners including Qantas and China Eastern airlines, trade and consumer distribution channels.

Brand Advocacy

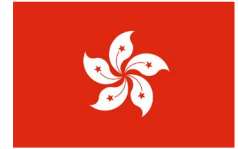
- Robust PR and advocacy plan for the market including alignment across Tasmanian Government to ensure unified brand message in the market.
- Destination awareness 'managed' through media channels – IMHP and VIP programs including utilising influential opinion leaders to deliver brand messages.
- Consumer engagement and recommendation through leveraging of social and digital platforms to allow sharing.

Strategic Partners for Conversion

- Align and integrate airline partnerships into marketing activity to drive seamless conversion process.
- Marketing campaigns with Key Distribution Partners to increase booking volume.
- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program
- Increased partnerships with high performing consumer segments such as premium and special interest travellers (Golf, Walking etc)

Hong Kong

Although some research analysts include Hong Kong as part of greater China, Tourism Tasmania separates the markets in regards to its marketing approach due to the significant differences in the travel trends and consumers within both markets.



Hong Kong is a more mature market for Tasmania with a higher destination awareness among consumers and stable growth over a longer period than China.

The political and economic environment is generally stable, with the consumer sentiment for outbound travel strong, with the low Australian dollar also being viewed favourably. It is the century of 'So-Lo-Mo' (social, local and mobile) in Hong Kong with a strong online culture.

Tasmania is well positioned as an appealing or 'exotic' destination by the growing segment of independent travellers from Hong Kong and there is opportunity to further target the younger 'DINKS' segment that is emerging from the market.

Although there is currently no Consumer Demand Project (CDP) undertaken individually for the Hong Kong market, the attributes that resonate with the Greater China research remain relevant, particularly the food and produce that is harvested and enjoyed locally.

Unlike China, there has been minimal growth in route capacity in recent years and Cathay Pacific have almost half the total market share out of Hong Kong to Australia, followed by Qantas Airways.

Distribution

The distribution system in Hong Kong has taken a big step towards digital and online platforms and traditional retail agencies frequently promote their own online booking portals. However, there is still a major bulk of consumers booking through the extensive branch networks of retail agencies especially for the financial transaction of the booking.

The Hong Kong Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 13,376 Hong Kong visitors arrived in Tasmania.
- Tasmania attracted approximately 7% of total visitors from Hong Kong to Australia in that period.
- Visitors from Hong Kong came for the purpose of a Holiday (94%), followed by VFR (2%), Education (3%), Business (1%)
- Hong Kong leisure visitors spent approximately \$26 million.
- Average Leisure Spend per Visitor to Tasmania : \$1,603
- Average Leisure Spend per Night in Tasmania: \$122
- Average Length of Stay: 13

Hong Kong *continued*

The Marketing Approach

Tourism Tasmania will also continue a 'full build' model in Hong Kong with a focus on partnership led conversion

This includes the following pillars aligned with Tourism Tasmania's Strategy Map 2015 - 2020:

Content

- Progressive and dynamic digital and social platforms underpinning strategy.
- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs
- Consolidated content plan through Key Distribution Partners and strategic partners such as Qantas.

Brand Advocacy

- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs including utilising influential opinion leaders to deliver brand messages.
- Consumer engagement and recommendation through leveraging of social and digital platforms to allow sharing.
- Brand advocated through niche sectors of appeal such as golf, wine etc.

Strategic Partners for Conversion

- Align and integrate Qantas partnerships into marketing activity to drive seamless conversion process.
- Marketing campaigns with Key Distribution Partners to increase booking volume.
- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program
- Identify and develop partnerships targeted at emerging youth 'DINK' market.

Singapore

Singapore has a stable political and economic landscape with the same ruling party easily reclaiming victory and the next election not due until 2010.



Singapore is a mature Asian source market for Tasmania, which has had a long presence in the market, and is well positioned as an inspiring destination to visit.

Singaporeans are discerning consumers who seek value for money destinations that offer safety and security. The shift in perception as an expensive destination is a result of the weakened Australian dollar, which provides opportunity for Singapore in the medium term.

Tourism Australia's Consumer Demand Project reflects this as being a 'safe and secure' destination as the most important factor for 64% of research respondents.

Good food and wine and local produce is also important with respondents aligning the key factors with that of the Tasmanian offering. This includes:

- Fresh produce grown or raised in a pristine natural environment (52%)
- Fresh Seafood (47%)
- Fish and chips on the beach (37%).

There is direct access from Singapore to all of Australia's gateway cities and although Singapore Airlines has strong market share, this is declining with the increase in choice and low cost carriers.

Singapore is also in the era of So-Lo-Mo (social - local - mobile) which is reflected in the increase in online bookings, and retail agencies are expanding their online presence. The traditional wholesaler model does not apply in Singapore, where large retail agencies brochure and market their own programs with links to inbound tour operators.

Search engines are important for the Singapore consumer who researches extensively as part of the price sensitive mentality. There are a significant number of consumers who will purchase airfares directly for the airline and then source ground arrangements through Online Travel agents or a retail agent.

The Singapore Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 8,867 Singapore visitors arrived in Tasmania.
- Tasmania attracted approximately 3% of total visitors from Singapore to Australia in that period.
- The majority of Singapore visitors came for the purpose of a Holiday (79%), followed by VFR (13%), Education (4%), Business (4%) .
- Singapore leisure visitors spent approximately \$9.8 million.
- Average Leisure Spend per Visitor to Tasmania : \$1,106
- Average Leisure Spend per Night in Tasmania: \$190
- Average Length of Stay: 6

Singapore *continued*

The Marketing Approach

Tourism Tasmania will continue a 'full build' model in Singapore with a focus of partnership led conversion. This includes the following pillars aligned with Tourism Tasmania's Strategy Map 2015 - 2020:

Content

- Strong digital presence with consumer push strategy.
- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs
- Consolidated content plan through Key Distribution Partners and strategic partners such as Qantas.

Brand Advocacy

- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs including utilising influential opinion leaders to deliver brand messages.
- Brand advocated through niche sectors of appeal such as golf, wine etc.

Strategic Partners for Conversion

- Align and integrate Qantas partnership into marketing activity to drive seamless conversion process.
- Marketing campaigns with Key Distribution Partners to increase booking volume.
- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program
- Identify and develop partnerships targeted at emerging affluent singles and 'DINKS' market.

Malaysia



Malaysia is politically and economically volatile. The ongoing corruption allegations, political sackings and deferring to the opposition party, and the impending 2016 election are all contributing to the 'knee jerk' environment. This is enhanced by the weakening of the Ringgit to the US dollar as well as other major economies. Two major Malaysian Airlines incidents over recent years have also impacted the airline industry.

Online bookings are growing rapidly, however the distribution system has become complex with consumers using a combination of online and traditional travel bookings in the decision making process. The preference for last minute travel purchases remains entrenched for most Malaysian travellers.

Tasmania is perceived as a premium destination and appealing to the high-end consumer. The product offering which can be targeted through distinct channels.

According to the Consumer Demand Project conducted by Tourism Australia, more than half of Malaysian travellers cite safety and security as their main motivation when selecting a travel destination. Other appeals are having interesting attractions to visit, value for money, good food, wine and local produce as well as world class beauty in natural environments.

Although, not perceived as a 'cheap' destination, the other appeal resonate well with the Tasmanian offering.

The Malaysian Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 6,646 Malaysia visitors arrived in Tasmania.
- Tasmania attracted approximately 3% of total visitors from Malaysia to Australia in that period.
- The majority of Malaysia visitors came for a Holiday (60%), followed by VFR (25%), Education (11%), Business (4%).
- Malaysia leisure visitors spent approximately \$7.4 million.
- Average Leisure Spend per Visitor to Tasmania : \$1,126
- Average Leisure Spend per Night in Tasmania: \$90
- Average Length of Stay: 13

Malaysia *continued*

The Marketing Approach

Content

- Digital presence through digital partner channels.
- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs
- Consolidated content plan through Key Distribution Partners and consumer direct through travel shows.

Brand Advocacy

Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs including utilising influential opinion leaders to deliver brand messages.

Dial up Tasmania's 'premium' product offering in Australia's image

Strategic Partners for Conversion

- Marketing campaigns with Key Distribution Partners to increase booking volume.
- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program
- Premium market strategy.

India

India is an emerging market for Australia, and Tasmania is seeing consistent quarterly growth, albeit off a low base.



The emergence of the middle class in India is seeing a boom in outbound travel, which is anticipated to continue to rise, with 'Visiting Friends and Relatives' being an important trigger for travel at almost 40% of total reasons for visit.

India has improving access to Australia from a number of key outbound gateways and is serviced by a variety of airlines.

The distribution system in India is highly fragmented, and although the digital environment is important in the planning and research phase, retail agencies still handle the majority of outbound travel bookings. Due to this fragmentation, the Aussie Specialist Program is the primary platform to train and develop frontline sellers on Australian holiday experiences.

Tourism Australia's Consumer Demand Project indicates (in order of preference) that safety and security, world class beauty and value for money is what Indian travellers seek when they are choosing a holiday. Australia's coastline, wildlife and island experiences generate greatest appeal, with aquatic wildlife rated as the most preferred Australian experience.

While these appeals somewhat resonate with the Tasmanian product offering, the lower yield of an Indian visitor combined with the perception of Tasmania as an expensive destination, impacts the long term growth.

The India Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 3,849 visitors from India arrived in Tasmania.
- Tasmania attracted approximately 2% of total visitors from India to Australia in that period.
- The majority of visitors from India came for the purpose of a Holiday (45%), followed by VFR (9%), Employment (7%), Education (3%) and Business (3%).
- Leisure visitors from India spent approximately \$2 million.
- Average Leisure Spend per Visitor to Tasmania : \$477
- Average Leisure Spend per Night in Tasmania: \$63
- Average Length of Stay: 8

India *continued*

The Marketing Approach

Content

- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs.

Brand Advocacy

- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs focusing on leveraging the Restaurant Australia concept.
- Leverage impact of the release of cinema blockbuster 'Lion' in 2017.

Strategic Partners for Conversion

- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program.

Indonesia

Due to its geographic proximity to Australia, developing economy and improved access, Indonesia is a 'watching brief' for Tasmania.



The Consumer Demand Project indicates that the important factors when selecting a holiday in Tasmania are not as well matched with the Tasmanian product offering, with 'Clean cities, good road infrastructure with clear signposts' coming in second only to 'a safe and secure destination'.

Although Garuda, at approximately 40% of total number of Indonesian visitors to Australia, is the largest carrier, there are a wide range of carriers operating on this route and capacity is growing.

The independent traveller market is growing rapidly in Indonesia, but the internet is primarily used as a research tool only, with most consumers booking through retail travel agencies.

The Aussie Specialist Program is the primary platform for Tourism Australia to educate frontline specialists and Tasmania will continue to develop content through this program.

The Indonesian Traveller Snapshot



In the Year ending 30 June 2015:

- A total of 1,044 visitors from Indonesia arrived in Tasmania.
- Tasmania attracted approximately 1% of total visitors from Indonesia to Australia in that period.
- The majority of visitors from Indonesia came for the purpose of Business (44%), a Holiday (40%), followed by VFR (12%) and Education (4%).
- Indonesian leisure visitors spent approximately \$377 thousand.
- Average Leisure Spend per Visitor to Tasmania : \$113
- Average Leisure Spend per Night in Tasmania: \$72
- Average Length of Stay: 2

The Marketing Approach

Content

- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs

Brand Advocacy

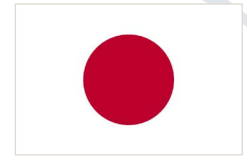
- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs including utilising influential opinion leaders to deliver brand messages.

Strategic Partners for Conversion

- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program

Japan

Although growth has been stagnant for some time, recent increased capacity and direct flights to Australia offer opportunity for stimulus to the Japanese Market, and Tasmania has enjoyed some recent modest growth in visitation.



Tourism Australia's Consumer Demand Project indicates that Japanese leisure travellers look for (in order of importance) safety and security, good food and wine and interesting attractions when choosing a holiday destination. The Great Barrier Reef and aquatic coastal experiences are rated as the most preferred Australian experiences.

Japan's distribution system is highly regulated with three levels of travel agencies. Traditionally the key focus for Australia has been wholesale package tour divisions of the General Travel Agents (GTA's), however independent travellers are growing, with a focus on special interest and segmented travel.

The Japanese Traveller Snapshot

In the Year ending 30 June 2015:



- A total of 4,220 visitors from Japan arrived in Tasmania.
- Tasmania attracted approximately 2% of total visitors from Japan to Australia in that period.
- The majority of visitors from Japan came for a Holiday (55%), followed by Business (21%), VFR (13%), Education (7%), and Employment (4%).
- Hong Kong leisure visitors spent approximately \$3 million.
- Average Leisure Spend per Visitor to Tasmania : \$715
- Average Leisure Spend per Night in Tasmania: \$59
- Average Length of Stay: 12

The Market Approach

Content

- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs.

Brand Advocacy

- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs focusing on leveraging the Restaurant Australia concept.

Strategic Partners for Conversion

- Trade education partnerships with key Partners and through Tourism Australia's Aussie Specialist Program.

Korea

Visitation to Tasmania from Korea has been in decline over recent years and overall visitation to Australia is stagnant.



Koreans primarily seek a safe and secure destination followed by interesting attraction and world class beauty when selecting Australia.

The distribution system in Korea is complex with no formal distinction between wholesalers and retail agents, and there is approximately 40% of group travel inbound to Australia from Korea.

Anecdotal feedback from Inbound Tour Operators indicates that Koreans book only their airfares to Australia from the source markets and make internal travel decisions and bookings once in Australia.

The Korean Traveller Snapshot

In the Year ending 30 June 2015:



- A total of 1,216 visitors from Korea arrived in Tasmania.
- Tasmania attracted approximately 1% of total visitors from Korea to Australia in that period.
- Visitors from Korea came for the purpose of a Holiday (66%), followed by VFR (20%), Business (7%) and Education (3%).
- Leisure visitors from Korea spent approximately \$3.9 million.
- Average Leisure Spend per Visitor to Tasmania : \$3,269
- Average Leisure Spend per Night in Tasmania: \$78
- Average Length of Stay: 42

The Market Approach

Content

- Channel content strategy aligned with Tourism Australia's assets including social, digital, trade education programs.

Brand Advocacy

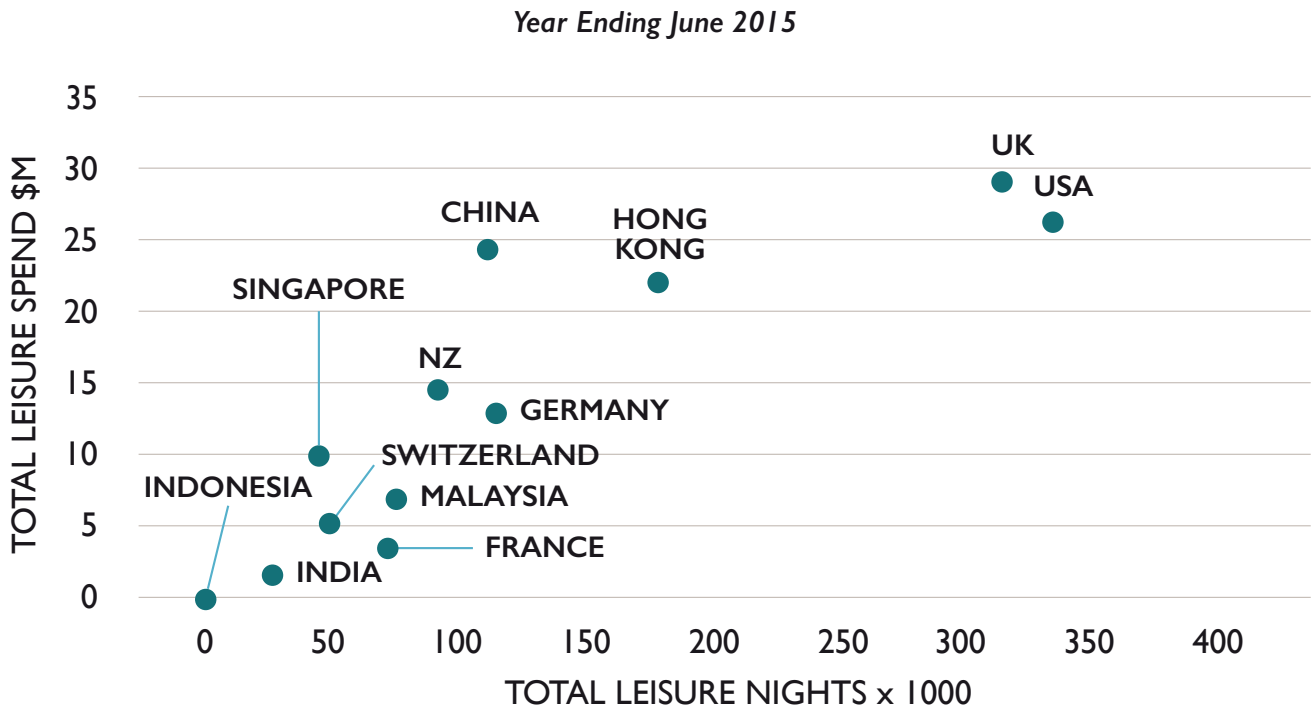
- Destination awareness 'managed' through media channels – International Media Hosting and Visiting Influencer Programs focusing on leveraging the Restaurant Australia concept.

Strategic Partners for Conversion

- Trade education partnerships with key partners and through Tourism Australia's Aussie Specialist Program.
- Domestic travel trade that on sell Korean dispersal once in market.

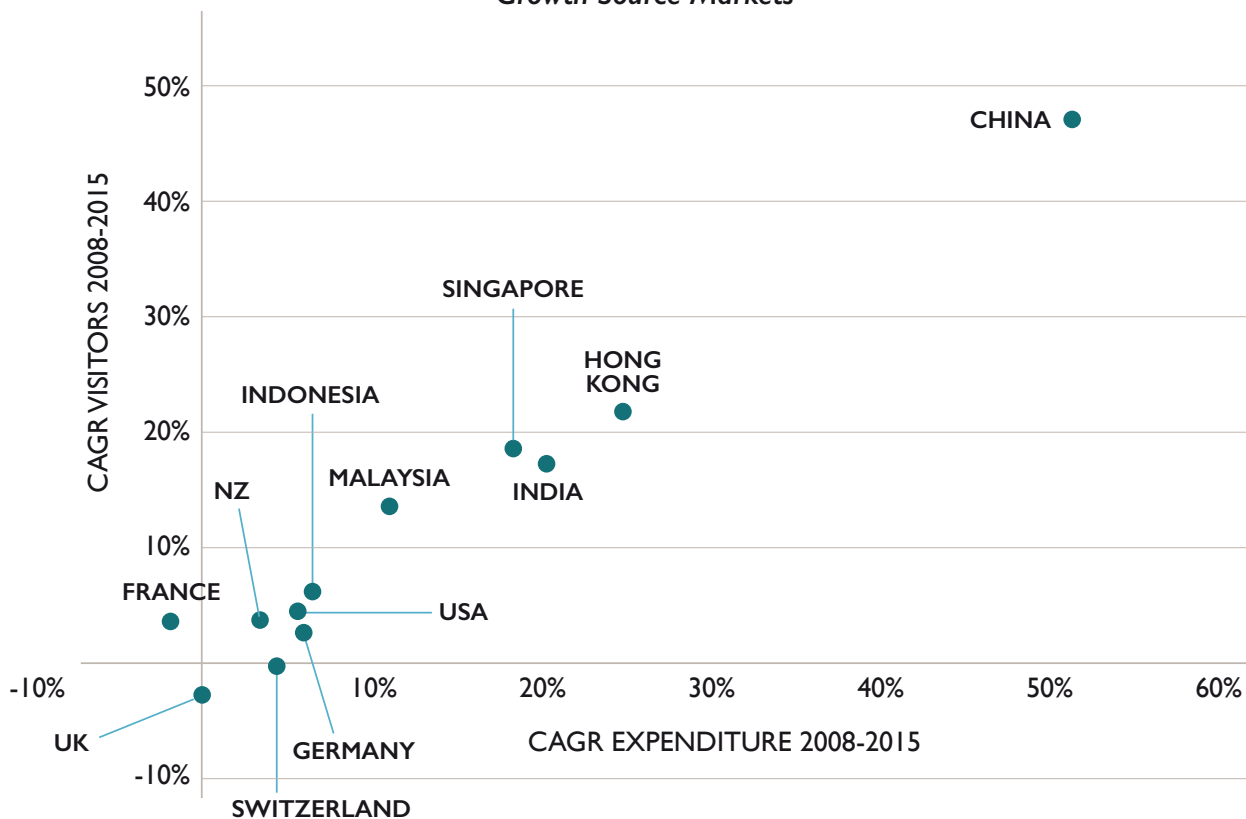
Conclusion

The analysis of each Asian market in detail based on the three key assessment criteria of destination alignment (as defined by Tourism Australia's CDP), the key statistical visitation factors (defined by IVS) and additional market insights from key stakeholders, has identified the priority Asian markets for Tasmania. These markets are, Hong Kong, China, Singapore and Malaysia.



When overlaying an analysis of compound growth and expenditure over a seven year period, India is also identified as an emerging market that will require increased servicing in future planning. This growth is likely to be accelerated through the launch of the blockbuster movie, 'Lion', scheduled for release in 2017.

















































































































Growth Source Markets



Tourism Tasmania will continue to focus marketing effort in areas where it has greatest impact in moving the consumer through the continuum to conversion in order to reach the required growth of international visitation to the state.

This will be achieved through ongoing collaboration and innovation of programs, including a comprehensive education program with Key Distribution Partners in each market to ensure the key destinational messages evolve with the maturity of the market.

Summary of Market Focus Areas 2016 - 17

								
	Hong Kong	China	Singapore	Malaysia	India	Indonesia	Japan	Korea
<i>Tourism Tasmania</i>								
In market representation								
Direct Partnership Campaigns								
Key Distribution Partners								
Consumer Direct social & digital platforms								
Airline Co-op Marketing Partnership								
VJP/Trade Famils								
Sales Missions								
<i>Tourism Australia</i>								
International Media Hosting Program								
Aussie Specialist Program								
Co-op marketing Campaigns								
PR market Activations								
Australia.com content strategy								
ATE/Trade events								

Appendix

The table below lists the key metrics for Asian Markets:

Market	Total Visitors	Total Expenditure	Average Expenditure per visit	Total Nights	Average nights per visit
China	25,010	23,941,803	957	113,884	5
Hong Kong	13,736	22,022,577	1,603	179,897	13
Singapore	8,867	9,808,727	1,106	51,760	6
Malaysia	6,646	7,480,741	1,126	83,548	13
India	3,849	2,011,496	477	31,909	8
Indonesia	1,044	377,243	113	5,266	2
Japan	4,220	3,017,127	715	50,818	12
Korea	1,216	3,974,726	3,269	50,771	42