



Tasmanian Sport Fishing Tourism Development and Marketing Plan



Phase 3 Market Analysis & Activities Plan Recommendations December 2006



An Australian Government Initiative

AusIndustry[™]



Tasmanian Sport Fishing
Tourism Development and Marketing Plan





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Cover photograph courtesy Tourism Tasmania. Bill Bachman photographer.





EXECUTIVE SUMMARY

Tasmania has held a position as a trout angling destination since the early 1900's when anglers traveled from interstate and beyond to fish the "Shannon Rise." The State's reputation was further enhanced by large fish experiences as new Hydro Lakes came on line and Lake Pedder particularly gained a wide recognition as a "trophy" water attracting many anglers.

The World fly fishing championships were held in Tasmania in 1988 and again attracted the attention of international and interstate anglers.

Despite these opportunities there has not been a coordinated approach to capitalize on Tasmania's reputation or advance our fishing resources and this plan's recommendations provide a pathway to re-establish Tasmania as a "must fish" destination.

This marketing plan is designed to increase tourist visitation and spend through recreational and guided fishing which can be achieved with comparatively modest outlays.

Tasmania is a boutique destination and our reputation and existence worldwide is steadily growing. These marketing plan recommendations are designed to strengthen this reputation.

Analysis of our market shows that this marketing plan will be implemented at a time when Tasmania's tourism industry has plateaued and there will be a need for activity based products with strong market appeal.

It is essential that industry moves from the "access led" phase to one that cares for quality activities particularly for the "short break" market sectors.

Despite recent increases in participation, BDA forecasting shows that there may be a 6% decline in Tasmanian fishing by the year 2011 resulting in significant losses to the State through visitor spend and license sales. If interstate rates of fishing continue to decline then there is a possibility to see a decline far exceeding 6% should we do nothing more.

Clearly and urgently the time to act is now.

For the very first time this plan has commissioned highly professional detailed research on fishing alone, recognising this sector as a key tourism opportunity and product.

This research clearly identifies some 90,000 interstate people with a propensity to fish in Tasmania and further, this group leaves home for recreational pursuits some 5.6 times per year.

This targeted group provides a central core to which marketing can be directed rather than the past practices of marketing predominantly to the single sector at the high end of the market for guided specialty fly fishing.

Significant partnerships have now been established, a State wide access programme devised and our fisheries managers have a new and invigorated approach with an understanding of contemporary needs.

Major progress has been made in gathering together all elements of the fishing community together with the concerned State Government instrumentalities and local Governments.

Adoption and implementation of this revolutionary plan in concert with a "whole of Government" approach will enable Tasmania to reach its full potential as a valued and world class fishery.

EXECUTIVE SUMMARY



Finally it is accepted that, historically changes to our angling resource require gradual introduction with significant consultation. This marketing plan should be considered in conjunction with the other recommendations of the “Tasmanian Sport Fishing Tourism Development and Marketing Plan.” The complete plan provides a real opportunity to place Tasmania’s fishery at the head of Australia’s recreational angling and provide significant benefits for all Tasmanians.

We acknowledge the seminal research of BDA Marketing Planning and the analysis of Reed McKibben Consultants written under the instruction and management of the primary consultants to the overall plan.





TOURISM CLIMATE

The National Tourism Climate

At a national level, various social and economic factors have seen the overnight leisure market in decline for several years. These include:

- Low cost air fares and massive promotional campaigns for targeted destinations
- Visitors taking shorter length holidays
- Increasing share of leisure travel taken as “visiting friends and relatives” (VFR), rather than holiday travel
- The strong Australian dollar fuelling outbound travel
- Rising fuel costs turning travelers away from car travel
- Competing products for the Australian consumer’s discretionary spend.¹

The Tasmanian Tourism Climate

- The Tasmanian tourism industry has continued to host an increasing number of visitors to the State, but is now a reflection of national trends.
 - 820,600 visitors in 2005, growth of 4% on 2004
 - 385,000 were Holiday Visitors, down 1% on 2004
 - Domestic arrivals are still dominated by Victoria and New South Wales
 - 112,300 International arrivals – up 10% on 2004.
- These statistics should be viewed within the context of several other important factors:
 - Average holiday length of stay down from 9.4 nights to 8.7 nights
 - Average holiday visitor spend per night up from \$210.00 to \$222.00
 - Average holiday visitor spend per trip down from \$1967.00 to \$1942.00
 - Holiday touring market (4+ nights) is down 2%, but remains the dominant market with 301,600 visitors
 - Holiday short break market (1-3 nights) is down 4% to 80,300 visitors.²
- There are several significant issues currently impacting on the Australian and Tasmanian tourism industry, amongst these:
 - Reduced/Low cost air fares
 - Shorter holidays
 - Increased VFR market
 - Average holiday visitor spend per night up from \$210.00 to \$222.00
 - Average holiday visitor spend per trip down from \$1967.00 to \$1942.00
 - Holiday touring market (4+ nights) is down 2%, but remains the dominant market with 301,600 visitors
 - Holiday short break market (1-3 nights) is down 4% to 80,300 visitors.³

These are resulting in a changing visitor mix and a decreasing yield across many sectors. While these changes offer many different opportunities, their potential impact on fishing holidays must be considered.

This plan is designed to improve the total visitor spend through a key segment – fishing. Tasmania is a small boutique destination, and niche markets such as fishing can make a significant contribution to visitor experience and spend.

TASMANIA'S MARKET OVERVIEW



Tasmania's Market Overview

- Tasmania has out-performed the rest of Australia in the last five years; however national trends are now beginning to affect travel patterns across the State, with a greater visitor emphasis in and around the major gateways of Hobart and Launceston. Change offers other opportunities that will require careful management.
- The Tasmanian tourism market is predicted to slow over the next five years.
- According to research commissioned by Tourism Tasmania, the State has already lost some of its competitive preference through national trends although there are some signs that this may be leveling off.⁴
- Some regional areas are experiencing challenges in attracting stronger visitation, although BDA Marketing Planning (BDA) research suggests that they are doing better than many of their regional counterparts on the mainland.
- Both nationally and locally, the VFR market is defying other, broader trends, with Tasmania experiencing an increase of 17% to 216,200 arrivals.⁴
- In the broader context however, the development of fishing in Tasmania will occur at a time when the Tasmanian tourism industry has plateaued; the need for an activity with strong market appeal (especially to the short break market) will be critical as the industry moves out of an access-led phase, to one that relies on the quality of our product offerings.
- **This overview demands an urgent “call to action”**





THE FISHING STORY

The Fishing Story

Against this backdrop of significant increases in visitation to Tasmania over the past 5 years - a 60% rise from 500,000 visitors to 800,000 in 2005, the number of angling licences purchased has declined, bottoming to 22,000 licenses in 2001/02 but since then steadily recovering to some 28,500 last year which is still lagging well behind the peak of 32,000 in the mid 90's.

There were a number of reasons for the decline - the main ones being:

- The lack of cohesive and ongoing marketing strategies through a whole of Government approach
- Under funded resource management prior to the present regime, resulting in a declining fishery
- Unsuccessful alterations to the organization and costs of inland licenses by previous managements
- Poor organisation and low morale amongst Tasmania's fisheries managers with a lack of contemporary vision, driven by resourcing deprivation
- The inability of professionals and amateurs to work collectively and share a strategic vision for the good of Tasmanian recreational fishing
- A lack of a "whole of government" approach to the fishing resource
- A marketing focus on the top end of the market as opposed to total resource opportunities

The improving licence sales have been the result of a new and invigorated Inland Fisheries Service that has introduced new stocking policies and improved resource management to the betterment of the resource as a whole.

A "popular water" strategy has been introduced where waters close to population centres are extensively stocked resulting in reliable catches for all angling methods. This strategy has also given a clear indication that appropriate stocking has the ability to not only improve angler satisfaction but also influence behavior patterns and participation rates.

The greatly improved management of the fishing resource is central to the motivation of the RFDP

The Organisation of Fishing in Tasmania:

Through the initiative of Trout Guides and Lodges Tasmania (TGALT) a sub-Committee, the Recreational Fishing Development Committee (RFDC) was formed which in 2005 was successful in winning a grant through the auspices of **AusIndustry** enabling the research and writing of this plan.

During consultation with stakeholders it was apparent that licensed anglers as a group felt they had little say in the management of the fishery. It was clear that such a body with a mandate

THE FISHING STORY



and strategic vision to address the ongoing improvement of the fishery was essential and a new body Anglers Alliance Tasmania (AAT) was formed representing the interests of all anglers.

The inestimable value of a strategic and shared view of what has to be done to address product development, access and marketing has been realised by the RFDC in association with TGALT and AAT and this has coordinated the approach to Government and angling stakeholders.

The challenge has been to engage all angler groups, fisheries management, government, marketers, consultants, water management authorities and power generators to present a clear direction and to get the various strategies funded appropriately.

What has been achieved to date has been significant since November 2005:

- The successful formation and ongoing operation of AAT as the peak body for licensed anglers with full fishing stakeholder recognition
- This body now is recognized through its credentials and ability to influence and assist government
- A re-invigorated IFS with a focus on the problems at hand

Now that these major breakthroughs have been achieved and proper research conducted strategies can be developed for implementation. Trout Guides and Lodges have submitted a grant application to [AusIndustry](#) for consideration in this year's round of the Australian Tourism Development Grants.





THE BASIS OF THE PLAN

The Basis of the Plan

For this marketing plan to work effectively, it is based on these fundamental research paradigms:

- We must learn who is coming now to Tasmania to fish, what are their dynamics and spending habits?
- Are they international or domestic visitors?
- How many people living in Australia have the propensity and desire to fish in Tasmania?
- If we can get to know that – where do they live and what are the easiest ways to communicate an attractive offer to motivate them to travel?
- It must be simple, easily understood and have appeal to TGALT and industry who may wish to join in co operative marketing activities, as well as enmeshing with Tourism Tasmania and State Brand characteristics / personality.
- It must be embraced by the government agencies involved in fishing, namely IFS primarily, also Forestry, Parks and Wildlife and Hydro Tasmania.

Research commission and Ownership

RFDC commissioned BDA to undertake a seminal piece of research for Tasmanian fishing.

The incredible value of this research must not be lost by inaction, nor must it be traded widely, as the key learnings from this work are now the very valuable intellectual property of the RFDC. Therefore, it should not necessarily be circulated widely in Australia with a potential resultant loss in competitive positioning.

A full copy of the BDA report is not part of this document due to the need for confidentiality of the research and its importance to the State of Tasmania.

THE SPORT FISHING SCENE



The Sport Fishing Scene in Australia

Overseas Inbound:

The number of people traveling from overseas (the inbound market) who fish whilst here, represent 4% of the total inbound market - a small but important percentage sensitive to statistical variables.

The total estimate is 175,000 visitors to Australia fished whilst here.

Tasmania gets 2% of these (3,500) but whilst this may be a small number they are an important potential market with much of forecasted future growth coming from the internationals who spend more and stay longer.

Overseas out

Australians going overseas to fish have increased in their numbers over the last two years - from 50,000 to 90,000

38% of those travel to NZ, 16% go to Fiji and 5% go to the US. (The top three destinations).

43% of the outbound market resides in NSW – and it's growing fast. This is a major market opportunity for Tasmanian trout fishing as 50% of this group travel to New Zealand.

Australians fishing at home

In December 1999 there were nearly 5 million fishing day trips taken by Australians and that number is now down to below 3.5 million in 2005.

The vast majority of fishing trips are down over the last few years (intrastate and interstate) since a peak in 2003

Interstate fishing trips are down by a massive 20% from 04 to 05- and 70% of all interstate fishing trips are taken to Qld and NSW.

The most popular interstate fishing destination is the South Coast of NSW with a capture rate of 15% of all trips. Whilst this is undoubtedly the result of population distribution and salt water opportunities, it represents a potential market.

The Sport Fishing Scene in Tasmania

Our share of the declining market in Australia is increasing (from 2.8% to 4%) through past marketing strategies implemented by Tourism Tasmania in association with Trout Guides and Lodges.

About 37,000 fishing trips were made last year from interstate.

Given the overriding change to Tasmanian visitation, it is not surprising that the fishing participation is increasing in the Short Tour (up to 1 week stay but not in one place) and in the Visiting Friends and Relatives segment.

Overall however, participation in fishing generally is declining in Tasmania and has been doing so for 3 years or more,

Interstate Visitors who fish whilst here show the same desire for Tasmanian produce, the wilderness and cultural heritage as all other visitors and they tend to stay longer and spend more.

The inbound fishing visitors are small in number to Tasmanian (3,500) and most originate from the UK. However they are an important secondary market to Tasmania and provide a major opportunity for high spend, long stay visitation increases.





THE IMPORTANCE OF TROUT TO TOURISM

The Importance or Otherwise of Trout to Tourism

Out of the 37,000 interstate fishing trips to Tasmania, 18,000 were for trout. (50%)

The research showed that Trout fishers spend more per day than other fishing trips.

The other question is – how many people came to fish for trout and did not do much more on their trip? How important is trout fishing? This was measured by those people who visited one or more non natural attractions. 27% of interstate fishing visitors only came for trout fishing and 73% fished for trout and did other things (trout plus)

To quote the research findings-

“Trout Fishing Only” stay for around half the time of Trout Fishing Plus, but only spend slightly less per night. Trout Only trips are much more likely to be based around visiting friends and relatives and are often undertaken alone, by older visitors coming from Victoria whereas those combining fishing with other attractions favour touring holidays and hence are more likely to stay in commercial accommodation. They tend to travel as couples and are more likely to come from either Vic or NSW.

(Marketing Strategy Development DRAFT 42 Prepared by BDA Marketing Planning 13/07/06)

The “trout fish only” and “trout plus” are identified groups which this plan recommends be widely targeted by Tourism Tasmania into the future.

For the inbound market, trout fishing is gaining the market share across all fishing types and is most likely to come from the UK and be visiting Friends and Relatives whilst on holiday.

This group has been identified as part of Tourism Tasmania’s “most profitable prospects” strategy.

Put simply, the trout fishery is the key to position Tasmania as a fishing destination.

A competitive edge

At the same time as Tasmania is rising in prominence as a trout fishery, the quality of trout fishing in interstate waters is diminishing as their fisheries management does not restock with levels of trout, but concentrates more on their endemic species. In addition Tasmania’s waters remain pristine by comparison and this provides significant competitive advantages.

Trout Licencing

Although Licence sales have risen in the last 3 years to 28,120 - they lag well behind the numbers sold in the mid 1990’s – 32,000. 80% are sold to Tasmanians.

Inbound is worth 1.9% of revenues and Interstate is in the area of 20% of all license sales, a figure growing in importance.

74% of the interstate licence sales come from Victoria and NSW, but the interesting fact is, that of all interstate license holders (about 5700 of them) around 35% visit at least twice in the same year, indicating a high incidence of loyalty demonstrated through repeat visitation.



The Primary Market - Interstate

The interstate numbers to Tasmania for visitors who fish are forecast to decline by 6% before 2011, **given that the participation rate does not fall further**, with the resultant loss in revenue to the State from the visitor spend and licence receipts.

If the participation rates of fishing continue to decline interstate – there is a possibility if Tasmania does nothing new – to see a decline much greater than the 6% - between 20 to 30% is forecast.

Tasmania must grasp the opportunity now.

The opportunity

The research team has sought out types of people in Australia through various filters that show the following characteristics:

- 1) That they would like to visit Tasmania and they have said yes to that proposition through market research when tested.
- 2) That traveled overseas or interstate for a holiday in the last year – demonstrating their capacity to and evidence that they spend well on traveling
- 3) That on that last trip they participated in either hunting or fishing.

(Please note that the Roy Morgan Research that includes the joint questions of hunting and fishing cannot be separated, but it is understood that hunting is a tiny proportion of that population.)

90,000 people interstate fit that match perfectly. They are termed the “most profitable prospects”

What else do we know about them?

“There is a concentration into three mid life groups:

1. up and coming Mature Solos and Young Affluent Parents,
2. affluent Families and No Kids couples
3. The less well off Middle Class Families and Lower no Kids, where a higher commitment of disposable income is involved.

Almost two thirds work full time and a majority are men living in the Cities, especially from NSW. Fishing is popular with bureaucrats, the public service and in manufacturing & construction industries.

They are active and sporting, enjoy parties, drink beer – but wine with meals, have ridden the economy well and are willing to try new experiences,.

They use the internet extensively, don't watch free to air TV as much as average Australians, but watch pay TV and buy 8 times the usual number of sport / hobby magazines. They get a lot of their information through newspapers.

Only 9% of them went overseas, very few to NZ, most travel to Queensland and the North Coast of NSW.





THE MARKET

They average 5.6 trips per year, mostly traveling as a couple (35%), then with family (26%) and thirdly alone (18%).

Their travel preferences were

- 1) Their own car,
- 2) Air
- 3) Hire car.

Hardly any of them use travel agents, by far the most are VFR – or have been before, but the internet has doubled from 15% in 2004 to 30% in 2005 of their primary information source.

In summary, there are 90,000 very qualified interstate prospects, who travel frequently with their partners / families and fish, whilst enjoying other aspects of active holidays.

They find out their information through newspapers, and use the internet extensively, and back their own judgment traveling up to 6 times a year for short break holidays, and they like the proposition of visiting Tasmania.

If AAT, TGALT, the IFS and Tourism Tasmania can find a proposition / product to match their needs and communicate the deal to them successfully, there is a huge opportunity to further penetrate this market.

The Secondary Market – Inbound

This market is treated as a development stage, with the UK and USA being the targets. Currently about 3,500 trips for all types of fishing, predominantly from the UK, but showing very high yield prospects.

They characteristically stay twice as long as the non fishing inbound visitor, half of them are visiting friends and relatives, and the USA is growing – albeit from low base numbers.

The plan recognizes that it will take some years to develop these markets to maturity, but that the investment is worthwhile given the yield and potential numbers.

TGALT and Tourism Tasmania have previously agreed to joint 3 year rolling international market visitations with finalisation of these arrangements on the completion of the RFDP.

Marketing Targets

The Tasmanian Recreational Fishing Development and Marketing Plan outlines its main target as increasing licence sales by some 5,000 by the year 2010, of which around 2,000 are visiting anglers.

This translates to an increase in total anglers of 18% and visiting anglers by 40% and this would generate an additional \$15M in tourism spend and 50 additional permanent jobs.

The research from BDA outlines an opportunity of a target market of 90,000 individuals, each of whom have the propensity to take 5 or 6 trips a year - with fishing included as a pastime in their last trip.

This would demonstrate that the notion of an additional 2,000 interstate anglers per annum is a very conservative and highly achievable target.

THE CENTRAL PRODUCT



The Central Product - “The Tasmanian Fishing Club” - Catch the Passion

The long term concept of a state fishing club based around the sale of licences could revolutionise Tasmania’s approach to anglers and the manner in which we care for their needs throughout a full year and beyond rather than a single season.

Put simply the heart of this marketing plan is to value add to each license sale through membership of the “Tasmanian Fishing Club.” In effect this membership is the license but brings with it significant and numerous advantages which would give Tasmanian angling a significant marketing edge over other Australian States and New Zealand. There should be nothing compulsory about this membership and those not wishing to partake can simply request a licence alone.

The plan consultants well appreciate that there are possible legislative difficulties in adopting this concept but with ownership of the Club remaining with the IFS it could well be regarded as just a different method of marketing angling licenses.

It is also understood that there are other issues that will demand a structured approach to the introduction of this club concept. Primarily it will be necessary to test financial viability and ensure that the IFS are in a position to adopt this exciting proposition.

The IFS whilst having ownership of the club could expect significant financial and in kind input from angling organizations, sponsors and others to ensure that their core business continues uninterrupted and the needs and understanding of all anglers are met whilst gradually introducing change.

Inherent to this plan is that local anglers will enjoy the same benefits of the club as visiting members and that the club’s creation will provide considerable increases to the revenues of the IFS.

- Club Membership transposes government imposts and licences, and promotes free and easy times – Club Membership entitles anglers to everything they have access to now - and more,.... lots more
- The Club becomes the brand and centrepiece for all promotions relating to fishing in Tasmania
- The Club is the vehicle for the website focus, becoming the portal for all visits for information on any aspect of a holiday to Tasmania that involves fishing
- Professional guiding would enjoy a focus within the club’s presence
- The club membership promotes a number of benefits – apart from being able to freely fish in Tasmania – it delivers up to date news on topical fishing events, local news, access and even daily weather reports
- Club Newsletters are great promotional tools, and can be a source of continuing marketing, following up each quarter with a new electronic newsletter providing offers, news, latest developments etc
- There can be events, dinners, merchandise and specials on accommodation and hire





THE CENTRAL PRODUCT

cars for Club Members, and the brand would be displayed on lodge doors- welcoming guests showing their membership cards and ID.

- Officially endorsed club suppliers, guides, merchandise and equipment will ensure a self regulated accreditation scheme is in place - guaranteeing quality product delivery and standards
- Assistance to the IFS with Club management could be drawn from the AAT, TGALT and other key stakeholders. It is not necessarily important to have all directors from the fishing community anyway – there is benefit from corporate directorships and commercial prowess.
- Club Ownership would be a partnership between the IFS assisted by industry
- Affiliations can easily be made with RACT and other clubs, associations and Foundations within Australia, and sister relationships with angling clubs made overseas.
- The club's activities and memberships will be advertised through fishing magazines, through travel journals and inserts, through a tag line on each advertisement, targeting the most profitable prospects.

Essential to this bold and innovative programme, which removes the feeling of impost to membership would be changing the way in which the IFS operate. It is recommended that a meeting be called of all angling bodies and involved government instrumentalities to discuss the organisation and responsibilities for Tasmanian angling resources and the raising of the profile of the IFS.

ADVERTISING, COMMUNICATION AND PR STRATEGY



The Advertising, Communication and PR Strategy

The first stage of the plan is to develop a first class website, which becomes the portal for all things fishing for Tasmania.

This site must consider all stakeholders and particularly the IFS, TGALT and Tourism Tasmania through their existing sites.

- The website will need great linkages (hot keys) to the Trout Guides, to Equipment and Accommodation suppliers, to airlines, travel agents, Memberships, to News, to Weather Alerts etc
- Understanding that a lot of anglers also see the other key appeals of a trip to Tasmania as being very attractive, the site will need to be compatible and seamless with www.discovertasmania.com and other related sites.
- The site can also have fly tying tips, video links and latest catch information.
- Purchasing club memberships can be done either through the website, meaning it will have to have secure financial transaction capability, - or through distributors (travel agents, equipment stores etc)

The launch of this site and the club name and ownership through the IFS is a major PR exercise, to be rolled out in the major markets of Brisbane, Sydney and Melbourne. TV fishing shows, recreational TV lifestyle shows, morning TV shows, (even cooking outdoor shows) radio and press can all be used to launch this major new initiative.

It would be proposed to engage a major fishing / lifestyle personality to add value to the brand, to authenticate the proposition, to assist in the conversion of the most profitable prospects in that “the process is easy and you can do it – just follow me”.

All the research points to the most profitable prospects relating very well to a personality that reflects their attitudes of “enjoying a party, having a positive outlook, being active and hands on, and often going away”.

This personality should be engaged for at least 2 years to become the “face of Tasmanian Fishing” and all that such a holiday stands for.

Some examples would include David Koch from Sunrise, Sporting legends such as Allan Border and Mathew Hayden or a media person like Charles Wooley - all people that demonstrate they share the same personalities that match the values of the brand.

The IFS – communication strategy

A significant marketing opportunity exists within the IFS and their database of licence holders and steps should be taken to overcome any possible privacy issues that exist in order to use this important database.

As with other government agencies, for example MAST and Motor Boat Licence holders with their mail outs and Tourism Tasmania with their operators - direct mail can contact those anglers with news, waters information, access and education materials, plus retailing opportunities - to generate further sales and provide a sense of urgency about their renewals. There is a 30,000 person mailing list already available which is a major marketing opportunity.





ADVERTISING, COMMUNICATION AND PR STRATEGY

The IFS could also become involved in the on ground marketing efforts, providing manpower for consumer shows, road shows, in store promotions and various programs that need an articulate and knowledgeable presence. The IFS have generally not been included as part of the Tasmanian marketing team and as they are a key player, and would hold the keys to the Fishing Club their involvement is essential. Coordination with Tourism Tasmania is also essential.

A further key recommendation is that an agreement of understanding be formed between the IFS and Tourism Tasmania to enable coordination of marketing with supply, together with other partners and industry where appropriate.

The Australian “One Fly” Championships

This is an exciting new initiative to be managed by the new body AAT, an annual competition with high value incentives to participate and serious prizes. It provides a focus for promotion of Tasmanian fly fishing throughout Australia and New Zealand, is a prime platform for corporate sponsorships (some of which are already showing great promise) and presents an opportunity to cement relationships with AAT’s partners. It will attract a very high level of media interest and has international connotations

It will be promoted through angling clubs, the web, the Fishing Club and the relationship partners programs.

Collateral Production

High quality collateral is essential to enable extensive marketing presentations both nationally and internationally. New innovative footage is required, featuring Tasmania’s unique advantages as a fishing destination.

Tasmania fishing experiences would be filmed for their individual and outstanding characteristics so that sections could be taken in isolation to fulfill particular marketing needs for Club presentations, web site action, podcast broadcasting, DVD’s for distribution. various power point presentations and general advertising material.

Whilst there have been efforts in this direction a greater structured approach is required involving all stakeholders.

Salt Water Opportunities

The salt water angling environment is an organizational challenge but presents major opportunities which must be encompassed in these State wide marketing recommendations

Because of the comparatively undeveloped nature of salt water service providers the consultants have not included Salt Water fishing in the main body of the plan but inevitably marketing Tasmanian fishing must cover this sector.

The RFDC and Tourism Tasmania will plan into the future to include this growing market segment in association with appropriate operators.

RELATIONSHIP MARKETING



Relationship Marketing

This plan includes working closely with key agencies and government layers.

Local government through 5 councils is involved in the access pilot program, and joint signage and collateral materials will be developed within that particular activity. Negotiations are well underway to include all Tasmania's local councils and the results are extremely encouraging.

Hydro Tasmania are the controlling agency for water and their land management policies that border the fishery are inherent to the success of the fishing plan - as critical in fact as their water flows management and lake level agreement.

They currently do not have an angling tourism strategy, but it is envisaged the fishing plan can assist in focusing the Hydro's operations on this particular use, using a formal protocol presently under negotiation. A pilot programme for Brumby's Creek which is currently under consideration will be used to further protocol planning.

Forestry Tasmania have indicated considerable support for this plan, with discussions ensuing on access to further fishing reaches from popular destinations such as Tahune and the Weld Valley. Their tourism operations are significantly funded (Tahune Airwalk, Dismal Swamp to mention a couple) and they have a well refined tourism marketing program. It would be intended to cooperatively link with some of their tactical programs.

The Parks and Wildlife Service hold tenure over some of the State's finest fishing waters. They also have a well refined tourism policy and infrastructure. As the land managers of the tourism icons of Cradle Mountain and Freycinet, World Heritage Areas and the Gordon River – fishing is a natural combination with bushwalking and a real marketing opportunity providing balance to the IFS'S programme for popular waters.

This plan would ensure that all partners are involved in co operative marketing activities.

Formal and semi formal agreements and Heads of Agreements are in various stages of being negotiated with each of these relationship partners covering the mutually beneficial aspects of the plan with the IFS, Tourism Tasmania, other involved Government entities, TGALT and AAT.





TOURISM TASMANIA NICHE MARKETING

Tourism Tasmania niche marketing activities

As the agency responsible for promoting Tasmania as a visitor destination, Tourism Tasmania segment the market for their allocation of resources, and fishing currently comes under the marketing banner of Niche and Special Interest.

They have promoted fishing in Tasmania as a high yield pastime, in concert with brand attributes consistently for years and they have an excellent body of research (also using the resources of BDA).

Meetings with Tourism have identified that a coordinated fishing plan has a great potential to augment their marketing activities. Current activities undertaken by Tourism Tasmania that support angling include:-

- Advertising in specialty magazines such as Fly Life, Freshwater fishing
- Consumer show participation in association with TGALT
- DVD distribution to interstate angling clubs
- On line fishing presence
- Visiting Journalist Program
- Podcasts
- Co Operative programs with industry partners

Fishing is also depicted as an experience within Tourism Tasmania's mainstream collateral materials, and there are further opportunities emerging for cooperative marketing programmes with Tourism Tasmania.

This plan recommends that a three to five year Marketing Plan be developed but due to the dynamic nature of tourism the actual marketing strategies employed for each year would be reviewed annually. This would allow alignment of the plan with future grant and other funding opportunities as well as the budgetary and in kind resources of all partners including Tourism Tasmania.

The following pages are a list of possible elements that could be included within the marketing plan in no particular order of priority. It highlights whether the elements are relevant to the interstate market – or the inbound market and notes the partners that can be involved cooperatively within the activities.

FISHING MARKETING MATRIX



Fishing Marketing Matrix

Marketing Element	Potential Partnering Details	Interstate Marketing Activities	Inbound Marketing Activities
Promotional Videos	TGALT with Tourism Tas.	Web Site, Posters, Brochures Power Point for In Store promotions, agents	Power Point and DVD for International Travel agents and fishing club presentations
Point of Sale	Through RFDC grant, Industry, Tourism Tas. and sponsorship.	Posters and banners for equipment retailers, travel agents and participating stores, driving the web based fishing club.	Banner and posters for giveaways at functions and in sports and tackle stores.
Cinema Ads	Joint with Tas Travel	Selected lifestyle cinema ad program in SE Qld and Sydney – featuring web based fishing club	
Website – On Line	Through RFDC grant and IFS, links to partners Tourism, Forestry, Hydro and Parks	The portal for all enquiry, data, memberships and the reference / contact for all advertising	The portal for all enquiry, data, memberships and the reference / contact for all advertising
Direct Mail	Through RFDC grant and IFS, and Tourism Tas.	Distribute mini discs to targeted audience through mailing lists developed from TGALT members IFS operations with 30,000 memberships Angling Clubs Australia Wide	Send out mini discs to targeted audience through mailing lists developed from TGALT members
Launch Campaign	Through RFDC grant and IFS	Roll out functions in Brisbane, Sydney and Melbourne	
Retaining the Personality	Joint with all partners by agreed contract	The “personality” of the brand, used in all collateral and marketing materials, used in the launch around Australia	Inbound by use of international personality





FISHING MARKETING MATRIX

Marketing Element	Potential Partnering Details	Interstate Marketing Activities	Inbound Marketing Activities
Magazine	Joint with Tourism Tas.	Establishing the web based fishing club to MPP's through lifestyle and dedicated fishing magazines, TV holiday programs and other media Continue with Flylife, Freshwater Fishing, add Modern Fishing and Fishing World Target the AMA Journal	
Visiting Journalists Program, and Tourism Australia	Joint with Tourism Tas. Forestry, Hydro, IFS	Establish connections and get fishing journalists to Tasmania, and endorse the club	Establish connections and get fishing journalists to Tasmania, and endorse the club
Co Ordination	Joint with all partners	Consultancy to manage and co ordinate the program for 1 year	Consultancy to manage and co ordinate the program for 1 year
Podcasts	Jointly with Tourism Tasmania.	– assist where identified opportunities with new collateral	Target international anglers UK and US
Sport Fishing Shows	Joint with Tourism Tas. and Industry partners	Club promotion with existing sports programmes	Target the US & UK recreational fishing markets
Travel Agents in bound and Angling Clubs	Joint with Industry and Tourism Tas.	Programme of mainland club promotions	Make presentations to selected agents and equipment stores, offer prizes, seek PR and visit Angling Clubs in UK and USA
Consumer Boat Shows	Joint with Industry and Tourism Tas.	Attend boat shows in Queensland, Adelaide, Sydney and Melbourne.	

FISHING MARKETING MATRIX



Marketing Element	Potential Partnering Details	Interstate Marketing Activities	Inbound Marketing Activities
Retailers across Australia	Joint with Industry and Tourism Tas.	Arrange in store promotions promoting Fish Tasmania, through equipment and tackle retailers Australia wide	
One Fly Championships	Joint with Tourism Tas. and Industry	Take a prominent position as organizers and facilitators	Promote event internationally through representation and T.Tas inter offices
Distribution	Joint with Tas. Temps and industry	Entice participation by industry into mainstream distribution systems	
Representative presentations	TGALT, T.Tas. Tackle representatives	Drive fishing club advantages, power point presentations to Clubs, Tackle stores, Professional bodies, Travel consultants and inbound agents.	Inter.representation presentations as per interstate marketing

(Footnotes)

¹ Trends, Performance, Forecasts p.4

² Tourism Tasmania, Tasmanian Visitor Survey 2005

³ BDA Marketing Planning.

⁴ TVS 2005

