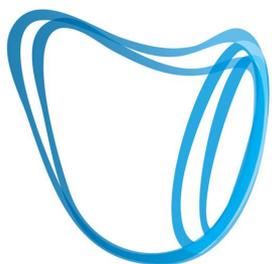


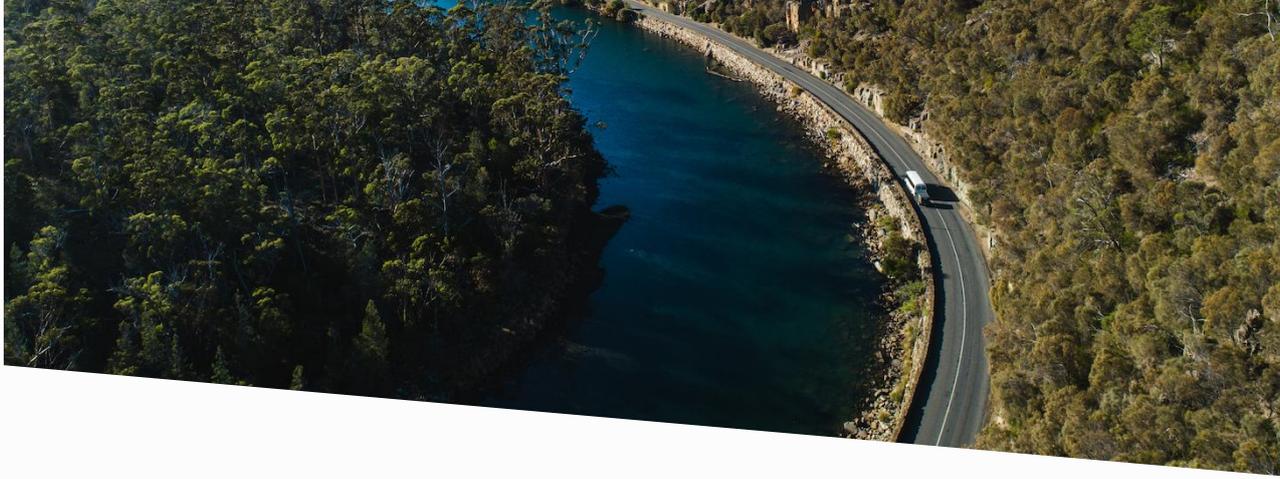
EAST COAST TASMANIA TOURISM

PRODUCT &
EXPERIENCE
AUDIT SNAPSHOT
- SOUTHERN

AUGUST 2020



east coast
tasmania



BACKGROUND

The Tourism Tasmania 2030 workshops identified the need for an audit of products, experiences, destinations, digital content and events, to identify gaps and opportunities for experience and product development to grow visitor connectivity expenditure, with particular focus outside of peak season.

Since the beginning of this project, a global pandemic has been declared due to COVID-19. Tasmania's East Coast has been identified as the sixth most tourism-dependent region in Australia and the impact on the region's businesses and community has been immense. It was noted throughout the audit that accommodation listings found in the initial searches were disappearing as the pandemic progressed. Businesses both directly and indirectly related to tourism are experiencing an unprecedented amount of uncertainty. While this report was initially undertaken in relation to achieving goals relevant to T21, it is evident now that it will also be a key tool to aid in supporting the industry during what is likely to be a long period of recovery.

East Coast Tasmania Tourism (ECTT) is one of four Regional Tourism Organisations. The RTO's are responsible for supporting the growth of the visitor economy in each respective region to help achieve the Tasmanian Government's overnight visitor expenditure goal for 2030.

The RTOs facilitate growth in the visitor economy at a local level by representing and coordinating the region's tourism and hospitality industry. The operations of ECTT are funded by Tourism Tasmania, Break O'Day Council, and Glamorgan Spring Bay Council with additional funding through marketing opportunities, partnerships and grants.



ACRONYMS

ATDW	Australian Tourism Data Warehouse
ATEC	Australian Tourism Export Council
BODC	Break O'Day Council
DAP	Destination Action Plan
DMP	Destination Management Plan
DT	Discover Tasmania Website (TTas)
ECTT	East Coast Tasmania Tourism
GSBC	Glamorgan Spring Bay Council
LBCA	Local Business and Community Association
LTA	Local Tourism Association
OTA	Online Travel Agent
PMS	Property Management System
ROI	Return on Investment
RTO	Regional Tourism Organisation
SEO	Search Engine Optimisation
TA	Tourism Australia
THA	Tasmanian Hotel Association
TICT	Tourism Industry Council Tasmania
TT	Tourism Tasmania
UGC	User Generated Content
USP	Unique Selling Proposition
UX	User Experience



PROJECT OVERVIEW

Conduct a Product and Experience Audit of the East Coast Tasmania Tourism (ECTT) region which will include the following:

- Desktop Product Audit gathering data from multiple sources; including, but not limited to the Australian Tourism Data Warehouse (ATDW), East Coast Tasmania (ECTT) website, key online travel agents (OTA) and aggregators, Google searches and social media channels.
- Independent ratings and social media review; evaluating current visitor satisfaction. This review provides a better understanding of the perceived quality of the products and accommodation across the region and the capability of operators to meet the expectations of the market.
- Evaluation of the current presentation and communication with regard to the products currently listed online.
- Ground truth; identifying inconsistencies between the information that can be found online and the information available on arrival at the destination, identifying gaps, out of date information and / or omissions.
- Analysis of the product audit and customer ratings; identifying gaps and opportunities, strengths and weaknesses in the ECTT product and experience offering as well as highlighting key areas for capability development.



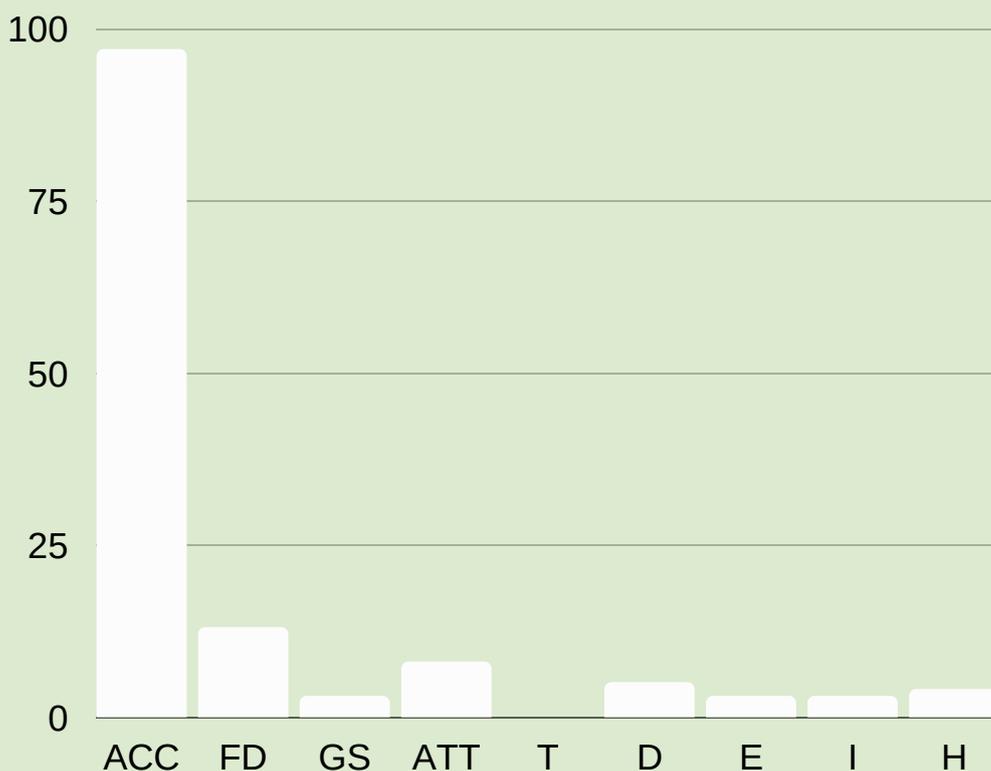
BUSINESS BY CATEGORY

The audited businesses totalled 139. Businesses were categorised as listed below. (Category types sourced from ATDW.)

Table key:

A:	Accommodation	97
ATT:	Attractions	8
E:	Events	3
FD:	Food and drink (Restaurants, Cafes and Cellar Doors)	13
T:	Tours	0
D:	Destination (East Coast e.g. Bay of Fires)	5
I:	Information Centre	3
GS:	General Service, (transport, shopping, health and well-being)	3
H:	Hire	0

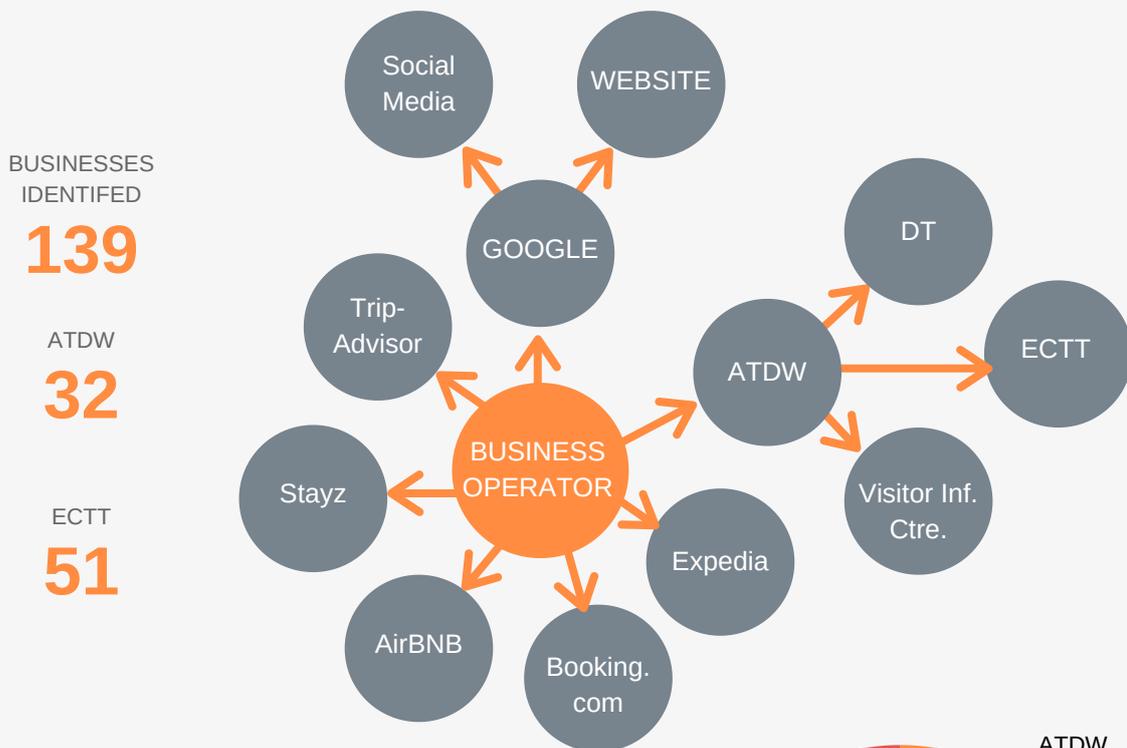
Total varies as some businesses have multiple listings to accommodate categories





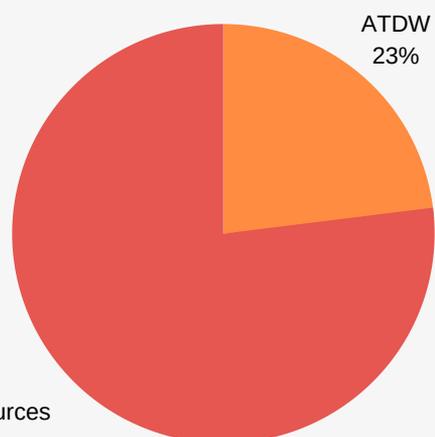
Australian Tourism Data Warehouse - (ATDW)

A total of 32 products are listed on ATDW in the Southern Hub. A further 107 products were identified through alternative sources including, ECTT website, AirBNB, Booking.com, Expedia, Stayz, TripAdvisor, Visitor Centres, Social Media and Google Search.



The current product and experience content within the ATDW is not consistent with the actual level of product and experiences on offer across the hubs. This is particularly the case for accommodation as well as some key visitor destinations and attractions.

Alternative Sources
77%





24%

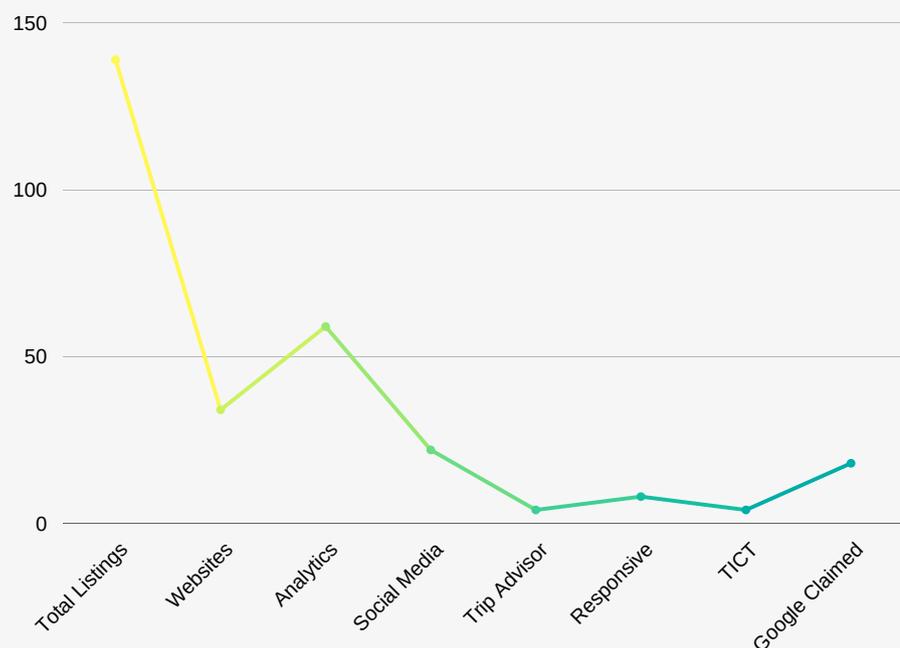
WEBSITES

Out of 139 businesses identified, only 34 (24%) have even a basic website.

Low number of websites:

- Causes consumer frustration as unable to locate adequate information with regard to planning holidays
- Decreases consumer confidence in the region
- Identifies a lack of a coordinated and collaborative approaches to building awareness of, and appeal for the destination,
- Lowers capability to build direct relationship with market, limiting opportunity to take advantage of word of mouth recommendations through the advocacy of visitors and partners and encourage repeat visitation.

**The graph below provides a summary:*





59%

ANALYTICS

Of those websites, only 59% have any kind of analytic software applied indicating the website is a stand alone affair; it is not being monitored for efficacy and therefore not likely being updated or improved based on analysis of the websites performance, SEO, audience analysis, bounce rates or conversion success (or otherwise).

Education should include the appropriate use of digital analytics in a meaningful way to measure success, and make informed decisions to improve return on investment and marketing efforts.



13%

GOOGLE BUSINESS LISTING

Only 13% of businesses searched had claimed their Google Business listing meaning:

- If there is a website, Google doesn't know about it and SEO suffers significantly
- Geolocation services are not being optimised with the use of Google Maps and the business is less likely to show up in searches based on location,
- Businesses are losing out on opportunity for review and creation of UGC,
- Unable to boost search results with Google Adwords
- Missing enormous opportunity to funnel traffic to website and / or social media accounts.



32%

FACEBOOK

32% of businesses could be found on Facebook. 65% of websites assessed included links to social media accounts.

The overall results after examining platform setup, posting regularity, content, engagement and consistency across platforms, paints the picture that while some businesses are making the most of social media, there were many lacking the knowledge, skills or time to put their best digital foot forward. Things that were frequently lacking:

- Professional profile picture: Ideally, this would be a clearly identifiable logo, identifying the business on the timeline.
- Header Image
- "Contact Us" call to action, (email or message button, telephone number)
- Poor quality or uninspiring imagery and / or video
- Irregular or very intermittent posting
- Overly "salesy" orientated content
- Low response rate to reviews and comments.



16%

INSTAGRAM

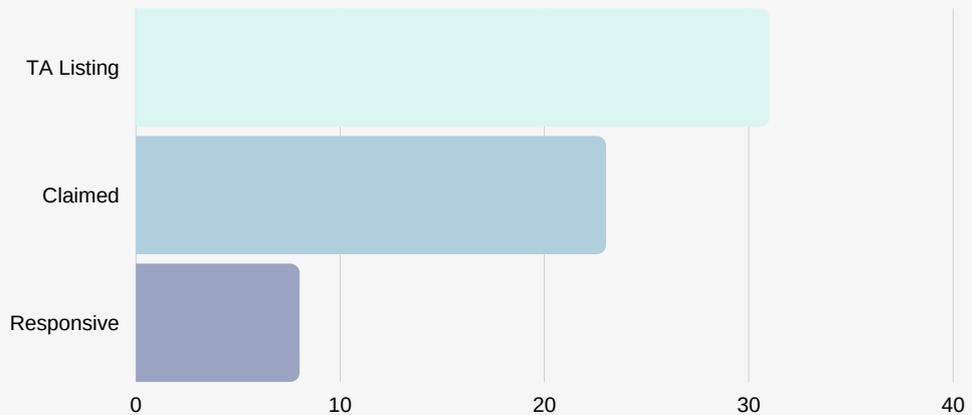
Instagram participation is growing steadily. Overwhelmingly, businesses with an Instagram page usually also have a more established Facebook page. Content consistency without repetition between platforms is considered best practice but most feeds assessed were identical.



22%

TRIPADVISOR

While 22% of businesses can be found on TripAdvisor, 17% of those listings are unclaimed. 12% of websites assessed have a link to TripAdvisor. 25% responsive (classified as the business responding to both positive AND negative reviews.)



74%

MOBILE RESPONSIVE

With over 85% of travellers using their mobile phone to book activities while travelling, mobile responsiveness should not be negotiable.



79%

WEBSITE SECURED

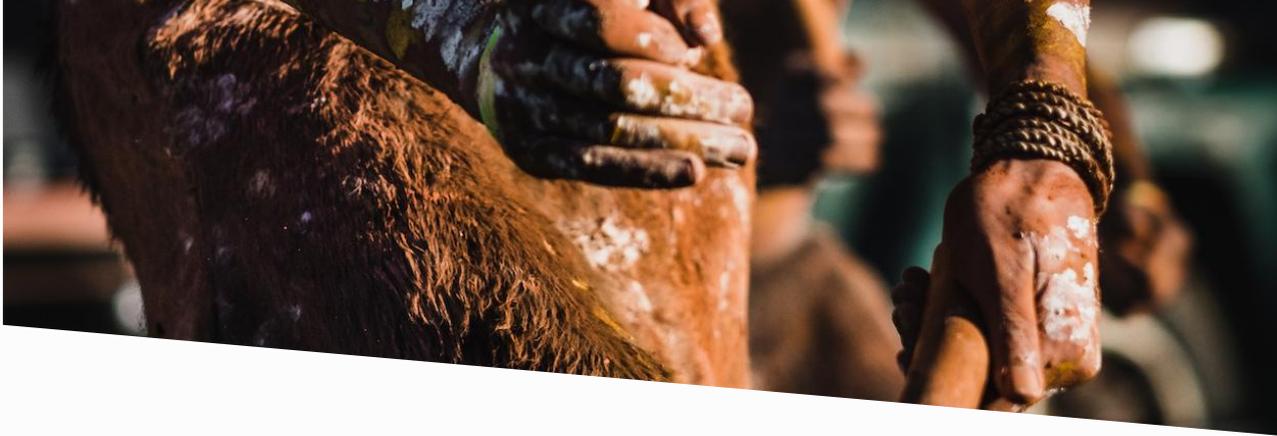
21% sites were unsecured, (Https vs Http), we're almost there.



1%

TICT ACCREDITATION

TICT advised 138 members with in the region, however only 37 acknowledgments were found on webistes.



1.5

CONTENT

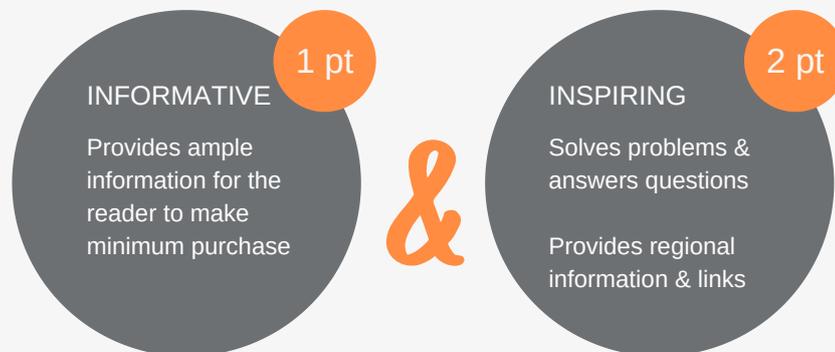
Content examined across websites, OTA 's, aggregator listings, TripAdvisor, social media accounts and Google Business was marked as either Informative, or Inspiring.

Inspiring content anticipates needs and wants, solving potential problems, and inspiring visitors to stay longer to enjoy the full range of experiences on offer in a particular location.

38%

**Websites linking out to 4 or more external pages of supporting or complementary business, tours or attractions.*

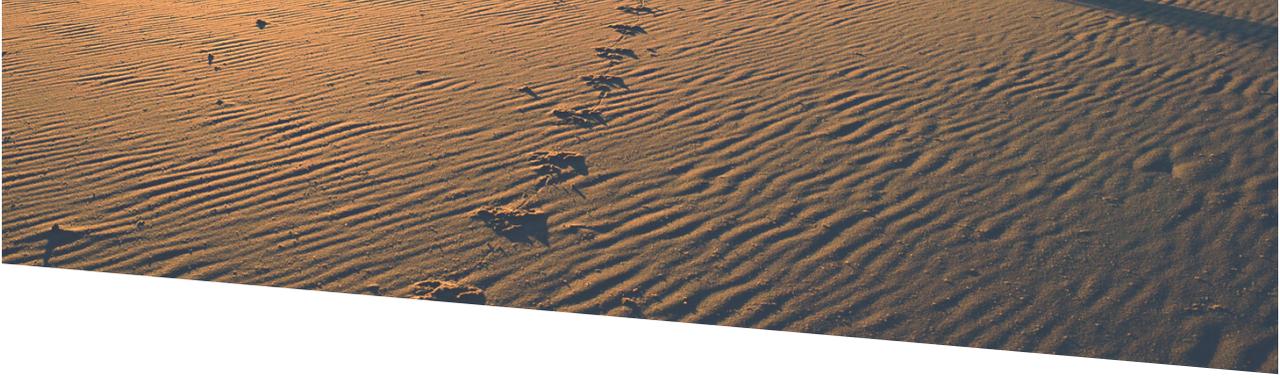
Content predominantly covered just the basic information required to understand the details of accommodation or tour – complimentary regional information was poor with only 38% of websites linking out to 4 or more external pages of supporting or complementary business, tours or attractions.



SEARCH ENGINE OPTIMISATION (SEO)

SEO was not formally measured. While there are some stand outs, overall, there is a clear knowledge gap with regard to the use of keywords and optimising SEO using relevant and inspiring content.

Very few sites incorporated a blog which is a proven way to both increase the usefulness of the site, building on relevant content, maximising key word usage and improving SEO.



USER GENERATED CONTENT (UGC)

The audit found very little evidence to suggest that businesses were taking advantage of UGC, and almost no evidence of businesses actively encouraging the creation and sharing of UGC.

The benefits of growing UGC are two-fold:

- Individual businesses benefit from creating stronger social media presence and building trust with their audience.
- ECTT is better able to promote the business and region with an increase in quality UGC showcasing the best the region has to offer.



ONLINE BOOKING

The accommodation sector is widely available to book online via OTA's and aggregators. Larger organisations use channel managers and PMS. Of note is the trend for smaller individual properties to have the "Book Now" button link directly to OTAs such as AirBNB rather than providing a direct booking link through a channel manager.

- The bulk of the accommodation across ECTT appears on Airbnb (over 550 listings).
- A high percentage of the stock listed on Airbnb is also listed on Booking.com and HomeAway / Stayz; OTAs owned by the two main aggregators Expedia and Booking Holdings.
- The vast majority of stock listed on Airbnb was not listed on ATDW or ECTT.

Approximately 50% of businesses in other sectors are offering online bookings which is problematic with visitors expecting to be able to plan and book online, often while in destination.



IMAGERY / PHOTOGRAPHY

While there are definitely some stand outs, overwhelmingly, imagery on websites is either dated, unclear, un-inspiring, and underselling the business and therefore, the region.

A vast number of accommodation listings were filled out with smart phone images. While it is entirely possible to create inspiring content with most phones these days, without the appropriate aesthetic education, most images fall well below the desired outcome.

Imagery was assigned points accordingly:

0

POOR QUALITY
Out of focus, neither descriptive or informative.

1

AMATEUR BUT CLEAR
Clear and informative only

2

AMATEUR BUT PLEASING
In focus, clear subject, thoughtful composition, enjoyable

3

PROFESSIONAL
Inspiring, connective, shareable

TOP SCORE:
3

AVERAGE SCORE
1.5



Websites: 15%
Social Media: 26%

VIDEO USAGE (Websites and Social Media)

Although used less frequently on websites, video quality was higher than that shared on social media which is to be expected.

When developing content generally there needs to be clear objectives relating to the purpose and desired outcomes. There is a knowledge gap across the network on how to create meaningful and inspiring content.