

# Tourism Info Monitor (TIM)

## Highlights from the July – September 2012 survey period

The Tourism Info Monitor is a regular quarterly survey by Tourism Tasmania of around 1 500 'travelling' Australians (people who have taken a holiday in the last 12 months or are considering a holiday in the next 12 months).

TIM helps us to better understand Tasmania's performance as a holiday or leisure destination, and provides insights into the views, behaviours and characteristics of 'travelling' Australians.

Below are some high-level facts and comments relating to the September 2012 TIM report, and the charts relating to this summary can be found within the *TIM Quarter 3 2012 Survey Results report*.

### Appeal

- The latest TIM results show that the appeal of a Tasmanian holiday remains high. Around 63 per cent of travelling Australians found the idea of a Tasmanian holiday appealing. Queensland is the only Australian destination that was considered appealing by more people.
- Not only is Tasmania a very appealing holiday destination, but it was also the second-most positively talked about Australian destination amongst travelling Australians during this period...as well as the least negatively talked about destination.

### Considering travel to Tasmania in the next few years

- The latest results show that since the TIM research commenced in early 2012, consideration by Australians for travel to Tasmania within the next three years has consistently been high during each quarter.
- Of all Australians surveyed for TIM since it began, around 33 to 35 per cent have indicated that they are considering a visit to Tasmania in the next two to three years.
- The tourism opportunity for Tasmania comes from better understanding these Australians and converting this 'consideration of travel to Tasmania' into actual travel sales/bookings.
- People currently considering coming to Tasmania in the next two to three years tend to be older and take more time when they're on their holidays.
- ***With an ageing Australian population and Tasmania's strong touring offer, older Australians (45 years plus) will remain a vital source of tourism for this state.***

### Considering travel to Tasmania in the next 12 months

- The latest results for the period from July to September, 2012 show that 19 per cent of travelling Australians are considering coming to Tasmania for a leisure trip in the next twelve months. This is an increase of 3 per cent on the previous quarter.
- Interestingly, people considering coming to Tasmania for a leisure trip in the next twelve months are tending towards being younger professional couples with high incomes.
- ***While they tend to take shorter rather than longer holidays, perhaps due to career and family commitments, they are a good source of repeat business for Tasmania.***
- ***In fact further analysis indicates that around two thirds of younger visitors and around one third of older visitors to Tasmania in the last 12 months are considering returning for a holiday here within the next 12 months.***

## Competition and media

- Not surprisingly Tasmania is not being considered in isolation to other Australian or overseas destinations as a place to go for a leisure trip. The market is full of holiday options.
- We are part of a broad repertoire of potential destinations to visit, so the goal is to give those people who are considering travel to Tasmania a reason why they should visit Tasmania rather than an alternative destination.
- From a media perspective, Tasmania competes in a busy and cluttered travel marketing environment, which includes Australian and overseas destinations.
- The level of awareness by travelling Australians of holiday advertising and information about Tasmania is similar to their level of awareness of advertising/info about Victorian, NT and NSW holidays.
- However, compared with other Australian states like Qld, NSW and Victoria, who tend to dominate the traditional media channels, word of mouth\* and other third-party endorsement or advocacy plays a much more important role in providing travelling Australians with holiday information and ideas about Tasmania.
- In fact, word of mouth and other forms of third-party endorsement or advocacy ranks as the number one media channel amongst respondents for information and ideas about Tasmanian holidays.
- During the last quarter, around 19 per cent of travelling Australians saw or heard something about Tasmania through word of mouth alone, which was an increase of 3 per cent from the June quarter.
- ***The fact that around 80 per cent of people who visited Tasmania for a leisure trip in the past 12 months said that they recommended Tasmania to others is further good news when considering the power of word of mouth and its influence over people's holiday choices. As long as we give visitors a positive memorable experience!***

## Holiday decision-making

- The latest TIM research continues to reveal that word of mouth\* and other forms of third-party endorsement or advocacy also plays an extremely important role in the travel decision-making of those Australians who have Tasmania on their holiday 'wish list'.
- Almost 30 per cent of those who are currently considering a holiday in Tasmania decided where to go to for their last holiday *based on the recommendations of their friends and/or family members.*
- The research also showed that special deals/packages, friends' photographs, and newspaper, TV, online or magazine stories featuring the destination, also influenced the holiday destination choices of those people who are considering coming to Tasmania for a holiday.
- And although around three quarters of all traveling Australians plan their trips independently (ie. without help from a travel agent), there is an indication that those who have Tasmania on their 'wish list' are more likely than other travellers to book their trips via a travel agent or purchase a package/deal.
- ***The findings on the holiday decision-making process reinforce the importance of generating independent and positive media coverage through programs like Tourism Tasmania's Visiting Journalist Program, and also show how the use of friends/relatives and special deals in campaigns like Save a Mainlander and Tassie Afterglow, can positively influence consideration and bookings for travel to Tasmania. By developing their own offers and deals and providing ways for visitors to share their experiences, tourism operators can make the most of the "word of mouth" phenomenon.***

\* **'Word of Mouth'** includes any communication with/from someone you know. This could be a work colleague discussing their holiday, sharing photos with family, or speaking to a friend on the phone or online about a travel experiences

For more information about the Tourism Info Monitor (TIM) and other tourism research/statistics for Tasmania, visit [www.tourismtasmania.com.au/research](http://www.tourismtasmania.com.au/research)