

Tourism Info Monitor (TIM)

Insights from the January – March 2015 survey period

The Tourism Info Monitor is a regular quarterly survey by Tourism Tasmania of around 1 500 'travelling' Australians. It provides insights into the performance of Tasmania as well as the views, behaviours and characteristics of people who have taken a holiday in the last 12 months or are considering a holiday in the next 12 months.

The TIM research project began in February 2012 and since then around 19 000 travelling Australians have been surveyed. Below are some high-level facts and comments relating to the TIM report for the first quarter 2015, which is published on Tourism Tasmania's corporate website www.tourismtasmania.com.au.

The findings of this survey are regularly used to guide Tourism Tasmania's marketing strategies and activities. Some insights from the most recent quarter from January to March 2015 include:

General Travel Behaviour

- This quarter's TIM results show that travel by Australians to international destinations in the last 12 months has increased significantly. They also show that Tasmania recorded the highest level of recent visitation, with around 8 per cent of respondents saying they had visited the state in the last 12 months.
- Just under half of travelling Australians are considering a trip to Queensland and over 40 per cent are still considering an overseas trip in the next 12 months.

Tasmania's appeal

- The latest TIM results show that around 68 per cent of travelling Australians consider a Tasmanian holiday appealing. This level of appeal is higher than the same quarter last year. Tasmania continues to rank as the second most appealing Australian travel destination, behind Queensland.
- Around 60 per cent of travelling Australians surveyed in the March 2015 quarter felt that Tasmania is being talked about positively, which is on par with the same quarter last year.
- Tasmania continues to be a highly recommended destination. During the three months to March 2015, 77 per cent of all respondents who visited the state recommended it to others after their trip. This is ahead of all other Australian states and now on par with New Zealand.

People considering travel to Tasmania within the next few years

- The results for the March 2015 quarter show that around 35 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years. This is up from 33 per cent for the same period last year.
- Around 19 per cent of travelling Australians said they are considering visiting Tasmania for a leisure trip in the next twelve months. This is similar to the previous quarter and has remained relatively stable over several quarters.
- The short-term and long-term consideration by "Life Long Learners" to visit Tasmania for a leisure trip was higher than the overall Australian travelling population.

Media and holiday decision-making

- Between January and March 2015, around 29 per cent of respondents were aware of media relating to holidays in Tasmania. This was similar to the same period in 2014.
- Tasmania continues to rank 2nd behind Queensland for media awareness. However competition between other states and territories for media awareness remains strong.
- Amongst travelling Australians, TV advertising and word of mouth* remain the dominant communication channel for ideas and information about holidaying in Tasmania.
- Word of mouth remains an important channel for Tasmania, with 20 percent of survey respondents stating that they had recently read, seen or heard something about Tasmanian holidays via word of mouth. Word of mouth is rated as an even more important source of ideas and information for those who said they were considering a holiday here.

Food and Beverage in Tasmania

- Again this quarter we asked respondents about their awareness of the food and beverage offerings in Tasmania.
- Food and wine is becoming a more significant part of Tasmania's overall tourism experience, and one of the key things that come to mind when asked about Tasmania.
- When asked specifically about Tasmanian produce, our seafood, cheese and wine are continuing to be top of mind for most respondents. Compared to the previous quarter the food, beer, whisky and wine of Tasmania is increasingly meeting expectations
- TV and word of mouth (generally and through family/friends) are key information channels for people to hear about Tasmania's food and beverage offering.
- Over 71 per cent of those who have heard of Tasmania's food and beverage offering consider our cheese to be high quality/world class.

About 'Life Long Learners'

- In recent years, Tourism Tasmania has focussed its marketing effort on a segment of the Australian population we have termed 'Life Long Learners'.
- The 'Life Long Learners' mainly live in metropolitan areas of the eastern seaboard of Australia, and their reasons for taking a holiday are generally to go exploring to discover and understand new people and places, or to escape and spend time together and create new memories.
- The latest TIM survey shows that 'Life Long Learners' are more likely than the average Australian traveller to include Tasmania on their list of considered destinations.
- Specifically, around 47 per cent of this segment are considering a visit to Tasmania in the next 2-3 years (compared with 35 per cent for the overall Australian travelling population), and around 23 per cent are considering a holiday in Tasmania in the next twelve months (compared with 19 per cent for the overall Australian travelling population).

* **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 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