

Tourism Info Monitor (TIM)

Insights from the October – December 2014 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 17 500 travelling Australians have been surveyed. Below are some high-level facts and comments relating to the TIM report for the third quarter 2014, 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 October to December 2014 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.
- In the next 12 months just under half of travelling Australians are considering a trip to Queensland, and over 40 per cent are considering an overseas trip.

Tasmania's appeal

- The latest TIM results show that around 63 per cent of travelling Australians consider a Tasmanian holiday appealing. This level of appeal on par with the same quarter last year, and Tasmania continues to rank as the second most appealing Australian travel destination, behind Queensland.
- Around 56 per cent of travelling Australians surveyed in the December 2014 quarter felt that Tasmania is being talked about positively, which is up slightly on the same quarter last year.
- Tasmania continues to be a highly recommended destination. During the three months to December 2014, 78 per cent of all respondents who visited the state recommended it to others after their trip. This is ahead of all other states in Australia, and second only to New Zealand.

People considering travel to Tasmania within the next few years

- The results for the December 2014 quarter show that around 33 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years. The same percentage as 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 October and December 2014, around 28 per cent of respondents were aware of media relating to holidays in Tasmania. This was up 3 per cent on the preceding quarter and similar to the same period in 2013.
- 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 19 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

- For the first time in TIM, we asked respondents about their awareness of the food and beverage offerings in Tasmania. This is becoming a more significant part of Tasmania's overall tourism experience.
- Food and wine are one of the key things that come to mind when asked about Tasmania.
- When asked specifically about Tasmanian produce, our seafood, wine and cheese are top of mind for most respondents. Fresh produce, beer and apples are also prominent.
- When recent visitors to Tasmania were asked about their experience, over 6 in 10 said the food and wine exceeded their expectations. Across all food and beverage types, very few reported that they were worse than their expectations.
- Word of Mouth (generally and through family/friends) is a key information channel when hearing about Tasmania's food and beverage offering.
- Over two thirds of those who have heard of Tasmania's food and beverage offering consider our cheese to be high quality/world class. Just under half also ranked our beer and wine as 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 discover and understand new people and places (go exploring, 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 39 per cent of this segment are considering a visit to Tasmania in the next 2-3 years (compared with 33 per cent for the overall Australian travelling population), and around 21 per cent are considering a holiday in Tasmania in the next twelve months.
- Life Long learners are also more likely than the average Australian traveller to visit local markets and shops; explore a region by car, visit heritage and historical sites and attractions, visit nature attractions and national parks, go hiking or bushwalking, visit specialist food and wine producers and dine out at restaurants during their holiday.

* **'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