

Tourism Info Monitor (TIM)

Insights from the July – September 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 over 20 000 travelling Australians have been surveyed. Below are some high-level facts and comments relating to the TIM report for the third 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 July to September 2015 include:

General Travel Behaviour

- This quarter's TIM results show that travel by Australians to international destinations still remains popular however, is down slightly on last quarter. Over 38 per cent of travelling Australians are considering an overseas trip in the next 12 months, and around one third are still considering a trip to Queensland.

Tasmania's appeal

- The latest TIM results show that around 64 per cent of travelling Australians consider a Tasmanian holiday appealing. This level of appeal is on par with the same quarter last year. Tasmania continues to rank as the second most appealing Australian travel destination, behind Queensland.
- Furthermore, 88 per cent of people who had visited the state in the past 12 months ranked Tasmania as the most appealing holiday destination in Australia and New Zealand.
- Around 52 per cent of travelling Australians surveyed in the September 2015 quarter felt that Tasmania is being talked about positively, and has fallen a few percentage points to become the 3rd most positively talked about destination after Queensland and Victoria.
- Tasmania continues to be a highly recommended destination. During the three months to September 2015, 69 per cent of all respondents who visited the state recommended it to others after their trip. This dropped from last quarter and Tasmania has now been overtaken by Western Australia as the most recommended Australian state.

People considering travel to Tasmania within the next few years

- The results for the September 2015 quarter show that around 34 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years. This is on par with 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.
- 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 July and September 2015, around 25 per cent of respondents said they were aware of media relating to holidays in Tasmania. This was on par with 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 around one out of every six people surveyed saying that they had recently read, seen or heard something about Tasmanian holidays via word of mouth. It was an even more important source of ideas and information for people who were considering a holiday here.

Food and Beverage 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 fresh seafood, cheese, wine and beer are continuing to be top of mind for most respondents. Compared to the previous quarter, more visitors said that Tasmania's food and wine exceeded their expectations.
- TV, recommendations from family and friends, and general word of mouth recommendation were key information sources for people to hear about Tasmania's food and beverage offering.
- Over 69 per cent of those who have heard of Tasmania's food and beverage offering consider our cheese to be high quality/world class. Our wine, boutique beer and cider is also rated highly by people considering a trip to Tasmania.

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 43 per cent of this segment are considering a visit to Tasmania in the next 2-3 years (compared with 34 per cent for the overall Australian travelling population), and around 21 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