

Tourism Info Monitor (TIM)

Insights from the January – March 2016 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 first quarter 2016, 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 2016 include:

General Travel Behaviour

- This quarter's TIM results show that travel by Australians to international destinations still remains popular however, is down on last year. Over 39 per cent of travelling Australians are still 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 69 per cent of travelling Australians consider a Tasmanian holiday appealing. This level of appeal is up slightly on last quarter and last year. Tasmania continues to rank as the second most appealing Australian travel destination, behind Queensland.
- Around 58 per cent of travelling Australians surveyed in the March 2016 quarter felt that Tasmania is being talked about positively. Tasmania ranks as the 2nd most positively talked about destination after Queensland.
- Tasmania also continues to be a highly recommended destination. During this quarter, 71 per cent of all respondents who had visited the state recommended it to others after their trip. Tasmania continues to be the most recommended Australian state.

People considering travel to Tasmania within the next few years

- The results for the March 2016 quarter show that around 32 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years. This is down slightly on the same period last year.
- Around 17 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 continue to be higher than the overall Australian travelling population.

Media and holiday decision-making

- Between January and March 2016, around 26 per cent of respondents said they were aware of media relating to holidays in Tasmania. This was down slightly on the same period in 2015.
- 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 almost one out of every five 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 those who were considering a holiday here.

Food and Beverage in Tasmania

- Food and wine continues to be 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, with these items exceeding traveller's expectations.
- TV, recommendations from family and friends and general word of mouth recommendations continue to be 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 42 per cent of this segment are considering a visit to Tasmania in the next 2-3 years (compared with 32 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 17 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