



Tourism Tasmania
tourism info monitor

Tourism Info Monitor Q3 Report 2016

November 2016

www.tourismtasmania.com.au



Tourism
Tasmania

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Background

Background



- The TIM Survey commenced in February 2012
- The data represented in this report is for:
 - *Quarter 3, 2015 – July, August, September 2015*
 - *Quarter 4, 2015 – October, November, December 2015*
 - *Quarter 1, 2016 – January, February, March 2016*
 - *Quarter 2, 2016 – April, May, June 2016*
 - *Quarter 3, 2016 – July, August, September 2016*

What will we learn



- A detailed understanding of Tasmania's performance as a holiday/leisure destination against other domestic locations, as well as testing and tracking of in-market, holiday campaign performance.
- It will provide insights into potential visitors:
 - What they find appealing in a destination
 - Last trip behaviour
 - Demographics
 - Activities enjoyed whilst on holiday
 - Media channels and information sources used

Who we spoke to

Methodology



- 500 respondents per monthly wave:
 - Of which at least 40 are Tasmania considerers/travellers 20 min interview length
- 12 waves per year

Target respondents



- Aged 18+
- Nationally representative sample (excluding Tasmania residents)
- Have taken a trip in the past 12 months
- Or are considering a trip within the next 12 months
- Quota on those that have travelled to Tasmania in last 12 months or considering to travel to Tasmania within the next 12 months

Panel provider My Opinions



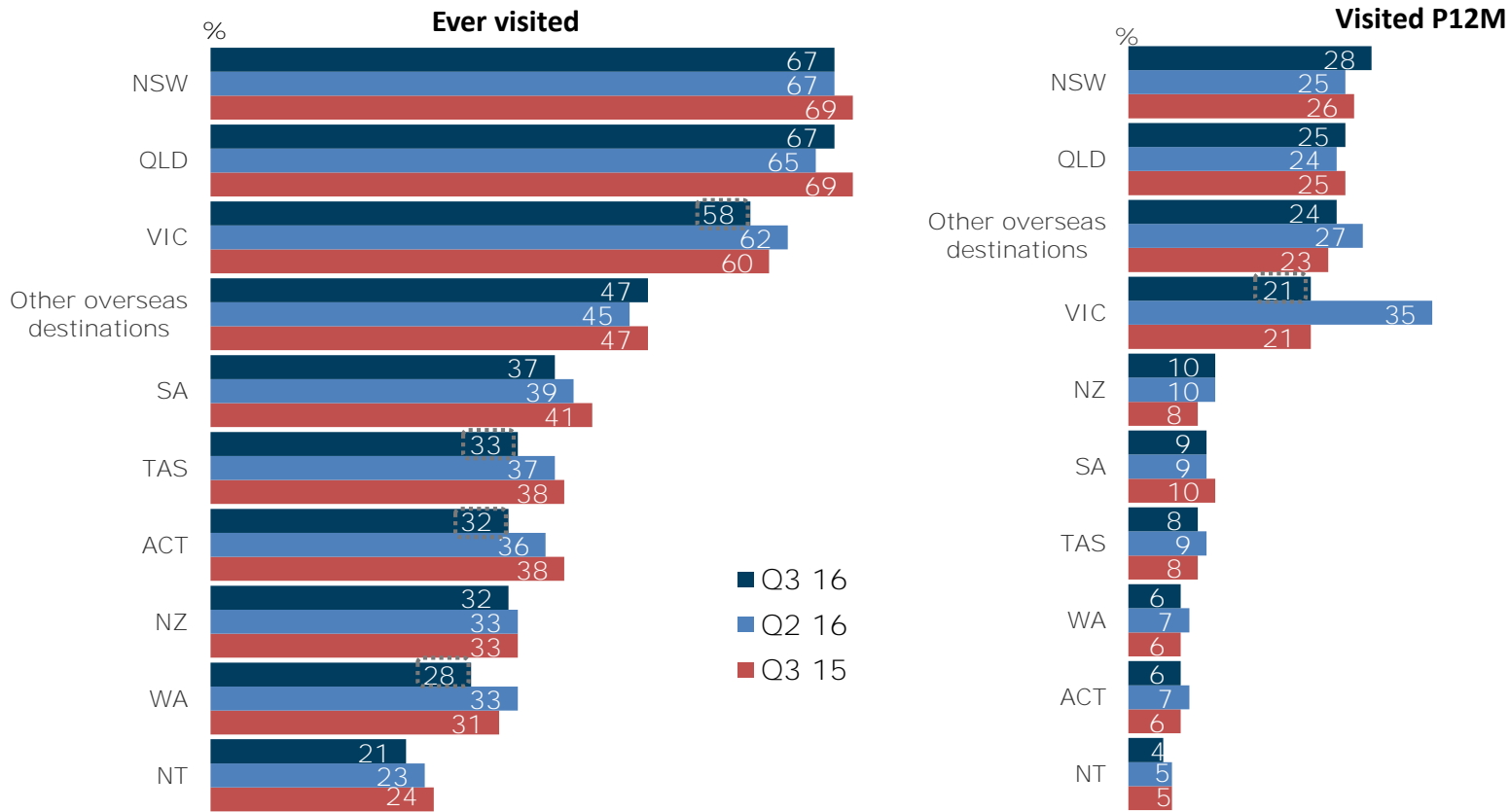
- Largest single source online market research panel in Australia
- Active panel of over 370,000 respondents
- Quarantine implemented for 6 months (Study will not contain responses from same respondents within any 6 month period)
- Accredited to ISO 20252 & ISO 26362



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Tasmania – Consideration

Past Travel Behaviour – Excluding Intrastate travel

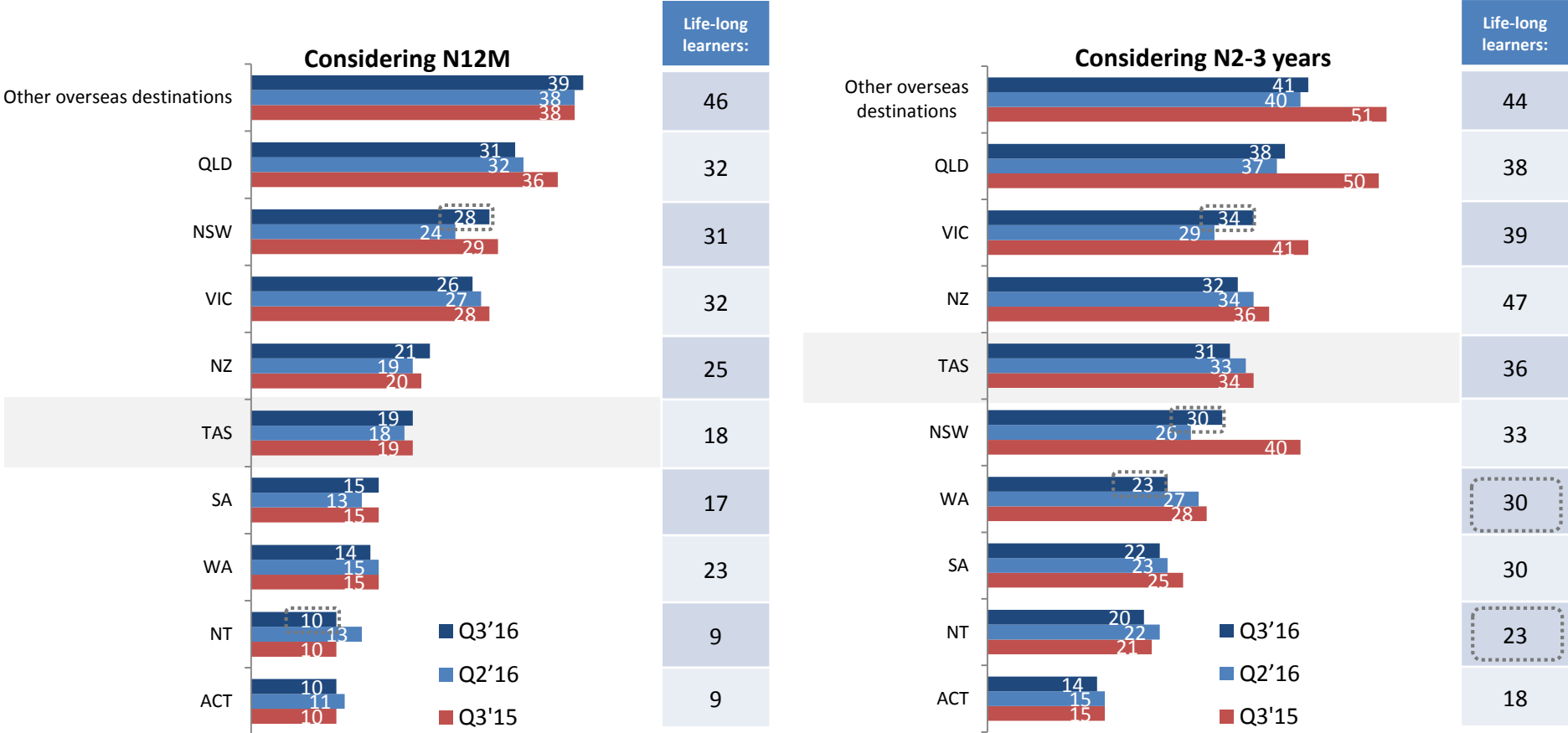


S2c. Which of the following destinations have you ever visited for a leisure holiday or break? S2b-Which of the following destinations have you visited in the past 12 months for a leisure holiday or break?

Base: S2c-all respondents Q3'15(n=1505) Q2'16(n=1513), Q3'16(n=1504); S2b-all have travelled within the state, to another state or overseas for a holiday or a break in the past 12 months Q3'15(n=1505) Q2'16(n=1311), Q3'16(n=1269);

■ shows significantly lower than previous quarter at 95% confidence level

Future Travel – Excluding Intrastate travel

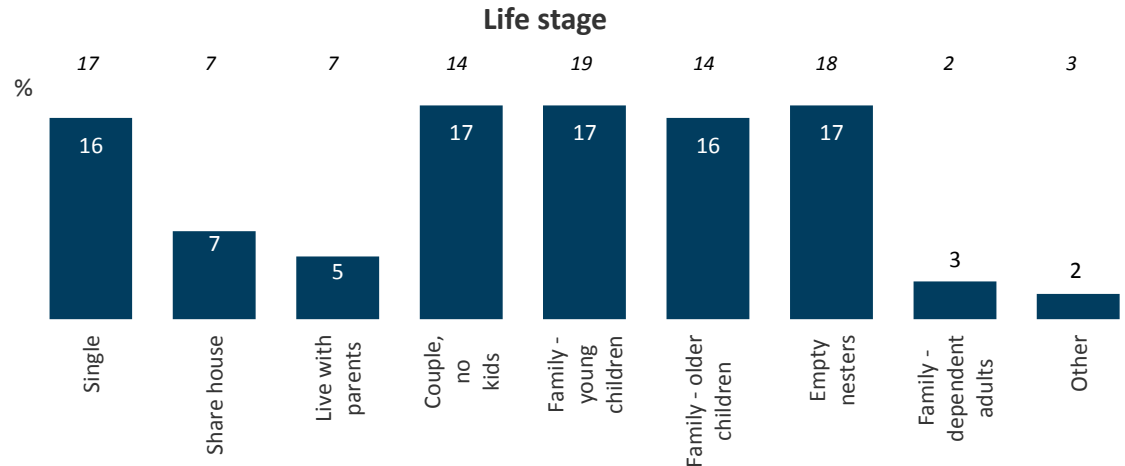
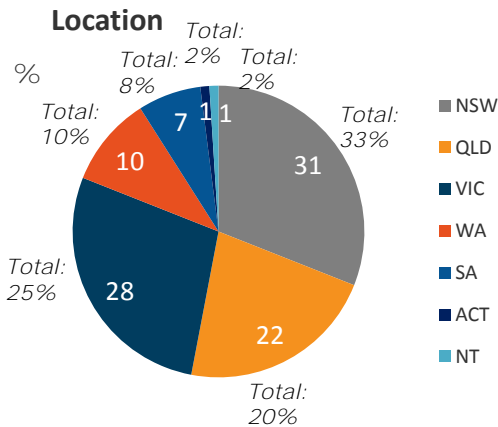
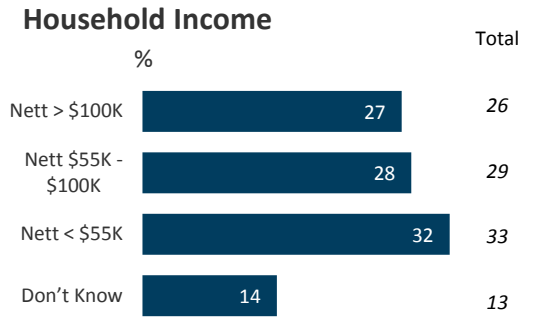
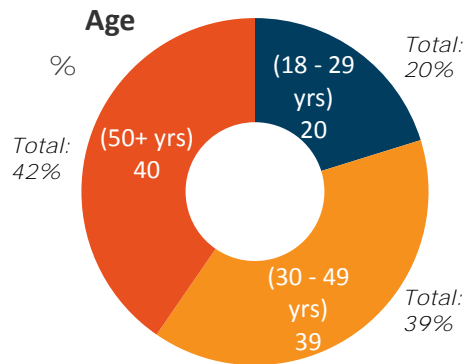
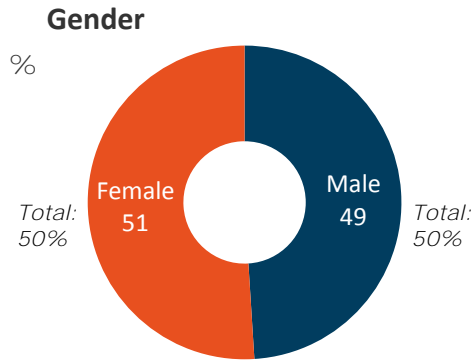


S3b-Which of the following places are you considering visiting in the next 12 months for a holiday or break? Q5-Which other destinations are you seriously considering going on holidays to/ or break in the next 2 to 3 years.

Base: Total sample: Q3'15(n=1505), Q2'16(n=1513), Q3'16(n=1504); life long learners Q3'16(n=163)

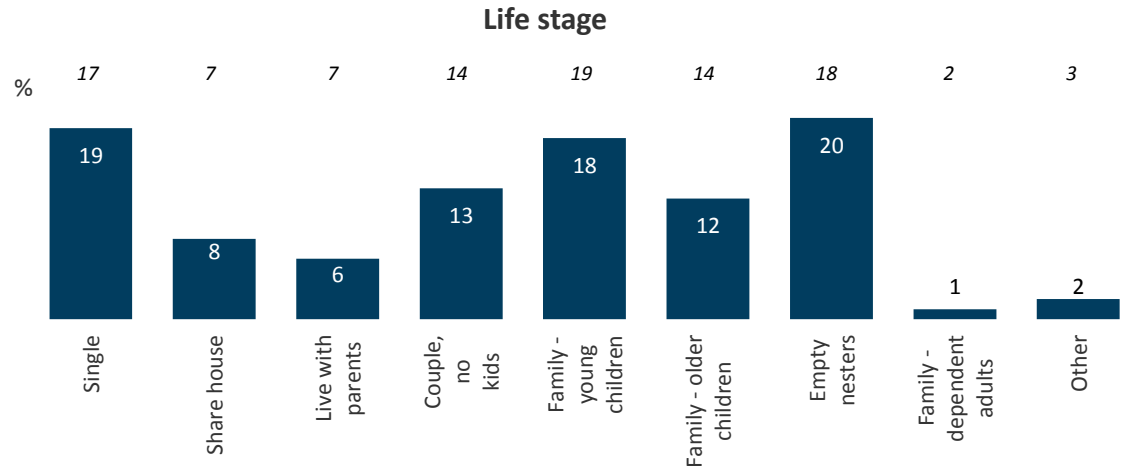
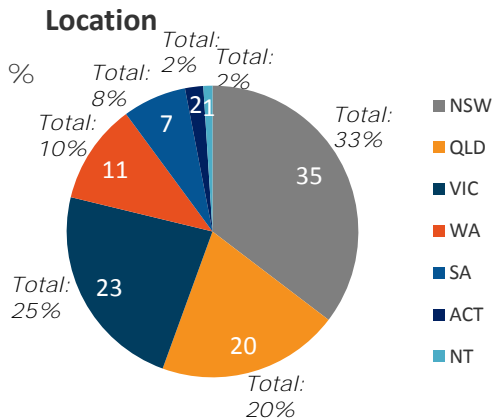
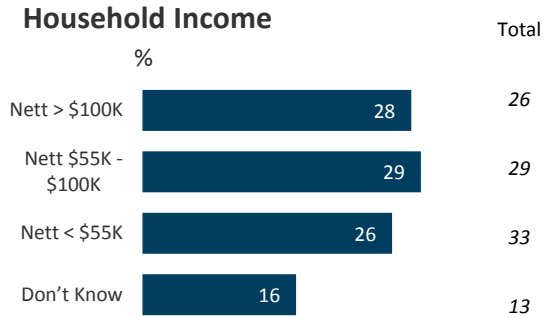
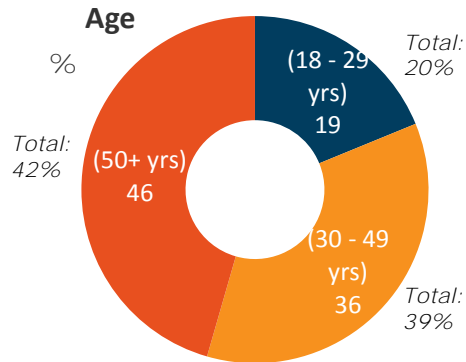
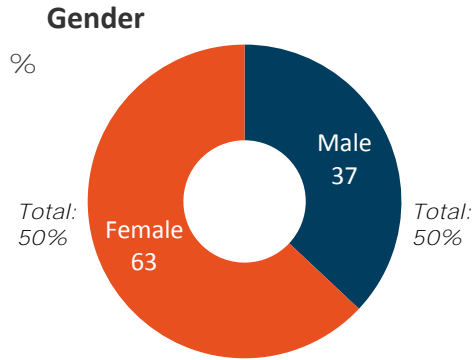
... shows significantly higher/lower at 95% confidence level (Q3 '16 vs. Q2 '16 OR Q3'16 vs. LLLs)

Demographics (*Tasmanian Considerers*)



Source: S5-Gender; S4-Age; D4-Current household combined income before tax; D1-Which of the following best describes the structure of the household you live in?; S1 Where do you currently live?
 Base: Total (n=1504), all are considering visiting TAS N3Y (n=472)

Demographics (Life-long Learners)



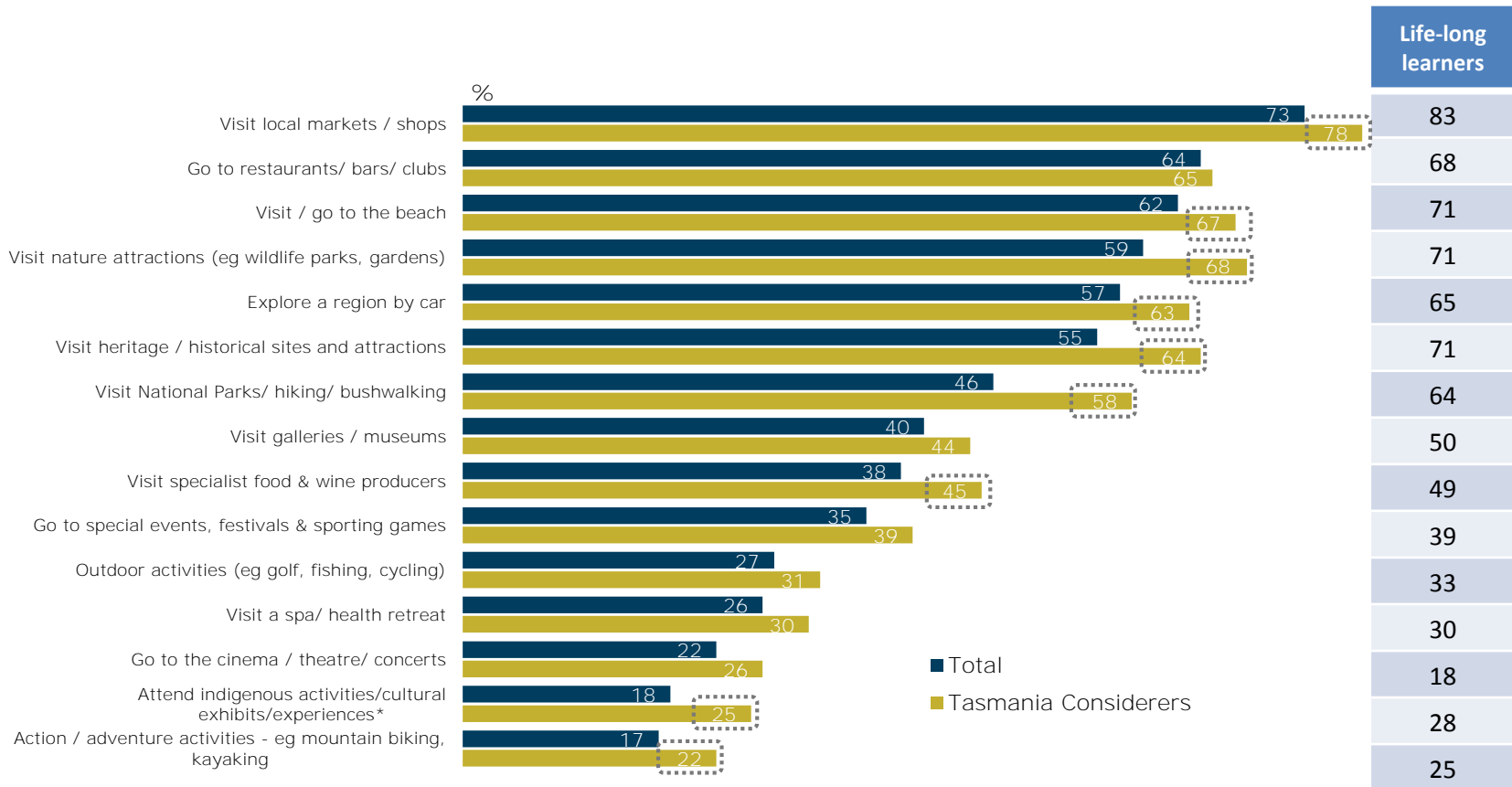
Source: S5-Gender; S4-Age; D4-Current household combined income before tax; D1-Which of the following best describes the structure of the household you live in?; S1 Where do you currently live?
 Base: Total (n=1504), Life-long learners (n=163)



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Last Trip Behaviour

Preferred Activities on Holiday



Q9. Which of the following activities do you like to do whilst on holiday?
 Base: All respondents (n=1504); TAS Considerers (n=472); Life-long learners (n=163)
 * shows significantly higher at 95% confidence level

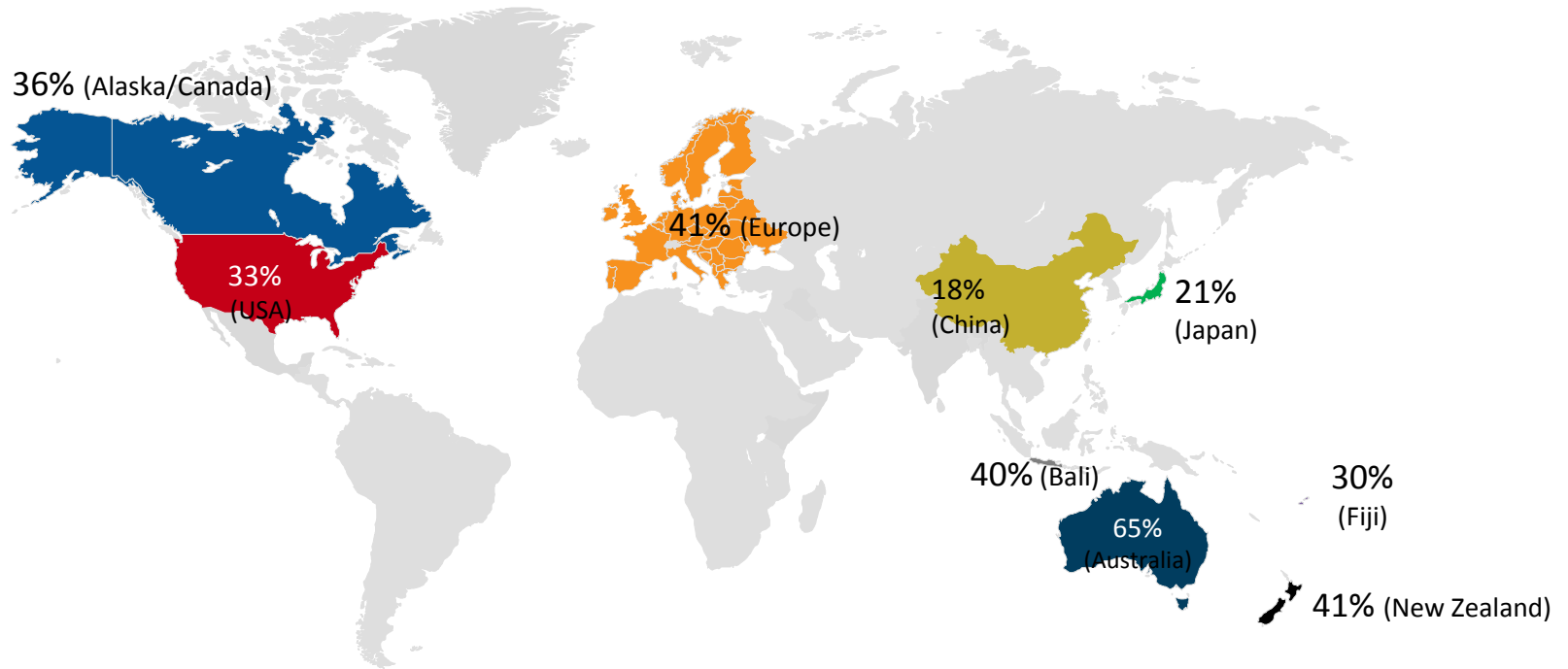
* Statement added in Aug. 2014



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Holiday Media Awareness

Media Awareness – International



Q1. Please click which of the following countries you have seen, heard or read anything about relating to holidays recently.

Base: Total n=1504

Holiday Media In Australia

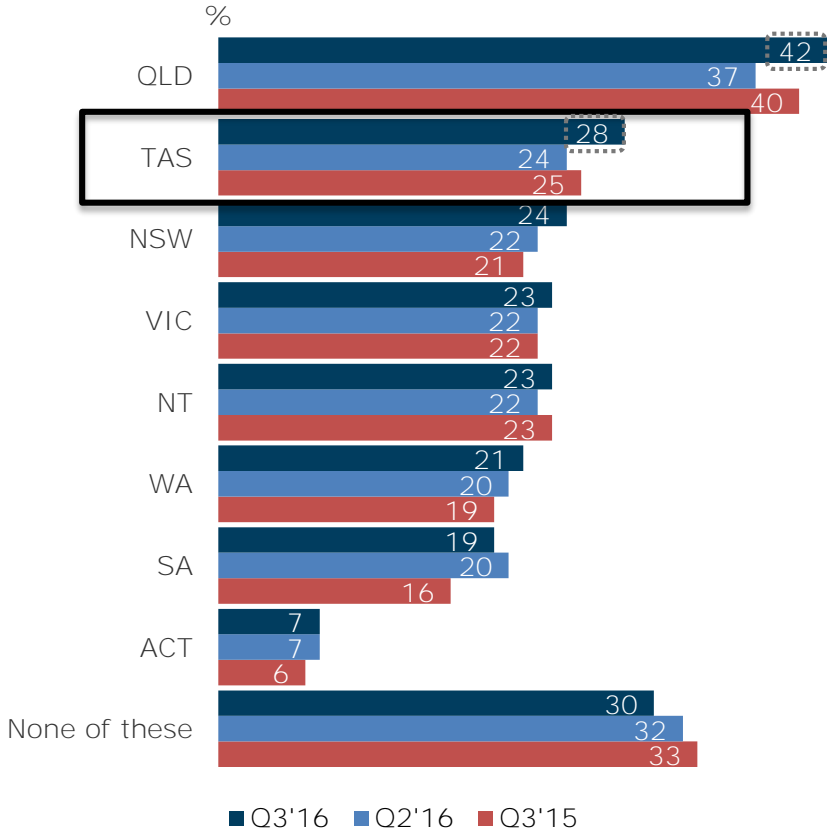


What did you see?

Q3. You mentioned that you have seen something in the media about holidays to destinations in Australia. What was that? Please include as much detail as possible about what you saw and where you saw it.

Base: Those that aware of destinations promoted in Australia Q2'15 n=1027

Advertising Awareness for Each State



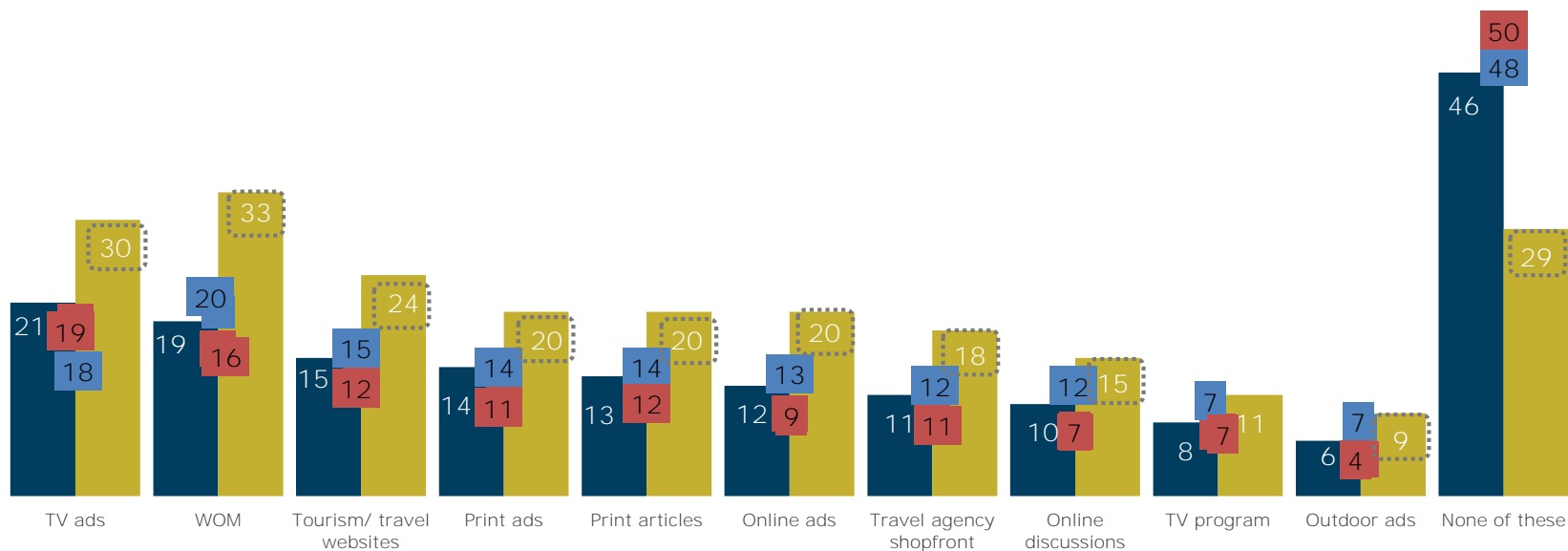
Q2. Please indicate which, if any, of the following state(s) or territory(s) you have recently seen, heard or read anything about in relation to holidays.

Base: Total Q3'16(n=1504), Q2'16(n=1513), Q3'15(n=1505)

☐ shows significantly different at 95% confidence level

Media Channels

%



■ Total Q3'16 ■ TAS considerers ■ Total Q2'16 ■ Total Q3'15

Q4. There are many ways, means and channels through which you might get ideas and information about where to visit for a holiday within Australia. Here is a list of possible ways in which you might find ideas and information about where to visit for a holiday. Please look at each channel in turn, and select which states/territories you have seen or heard anything about via that channel in the past few months. Select as many states/territories that apply.

Base: Total Q3'16 n=1504, Those considering Tas n=472; Total Q2'16 n=1513; Q3'15,n=1505

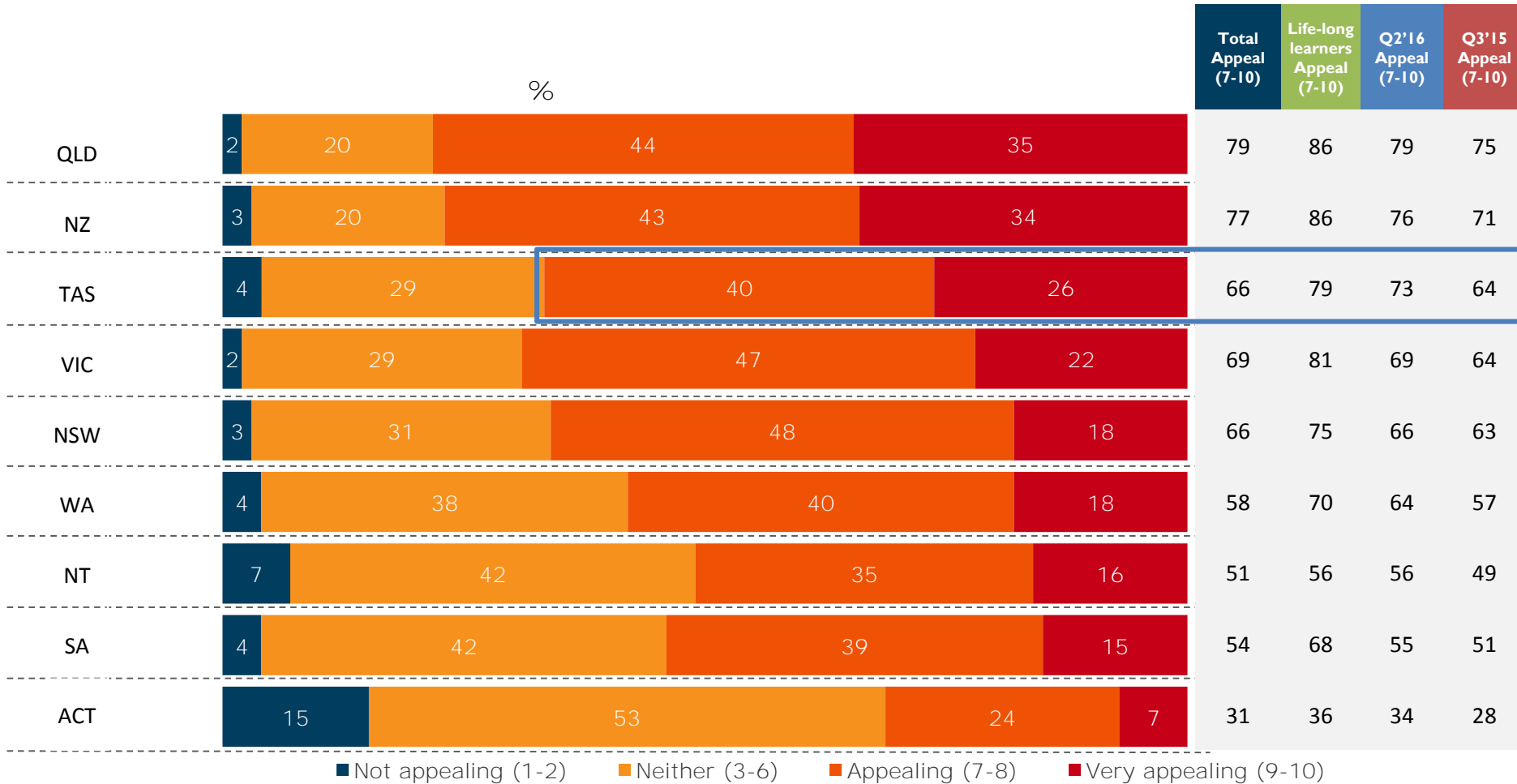
□ shows significantly higher at 95% confidence level



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Understanding Tasmania's Appeal

Appeal of Destinations



Q19. How appealing is a holiday at each of the following destinations?

Base: Total Q3'16 n=1504, LLL n=163

Thinking about Tasmania as a destination, what comes to mind?

wet cold weather.
Beautiful scenery.
Quite and peaceful.
Green.

Wilderness. The opportunity to see one of the last natural habitats in the world. Great seafood. Easy to get to places.

The scenery, wilderness, very easy to drive around, peaceful, not crowded, much slower pace than the mainland

Rolling green hills, getting back to nature, hiking and bushwalking, exploring. Historic tours

Nature more than anything, snow on mountains, English-style buildings, appealing restaurants and food outlets, friendly people, Spirit of Tasmania etc.

wet cold weather.
Beautiful scenery. Quite and peaceful.
Green.

Great scenery, wilderness. Clean environment, great food and friendly people. Easy to get around.

Beautiful historical buildings great architecture, cold climate, freshest produce! Best salmon seafood, and wines.



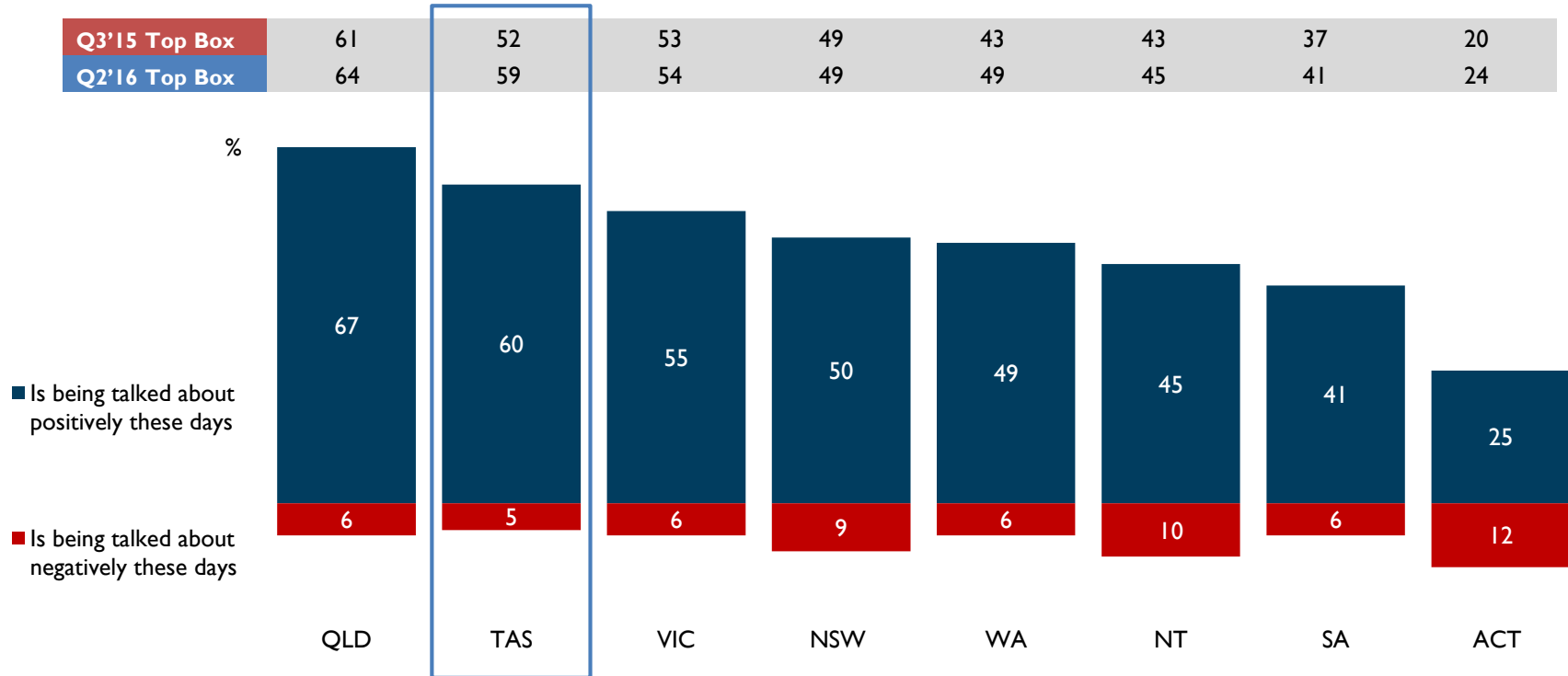
snow and national parks and good fresh seafood

Countryside and rural life - not all the mod cons and not overdeveloped. Laid back people and friendly/hospitable

Very unique part of Australia, a lot of natural sights to see. Historical landmarks. Cold weather.

The beauty of the untouched nature, wild animals, fresh seafood. Friendly people. cold and windy winter.

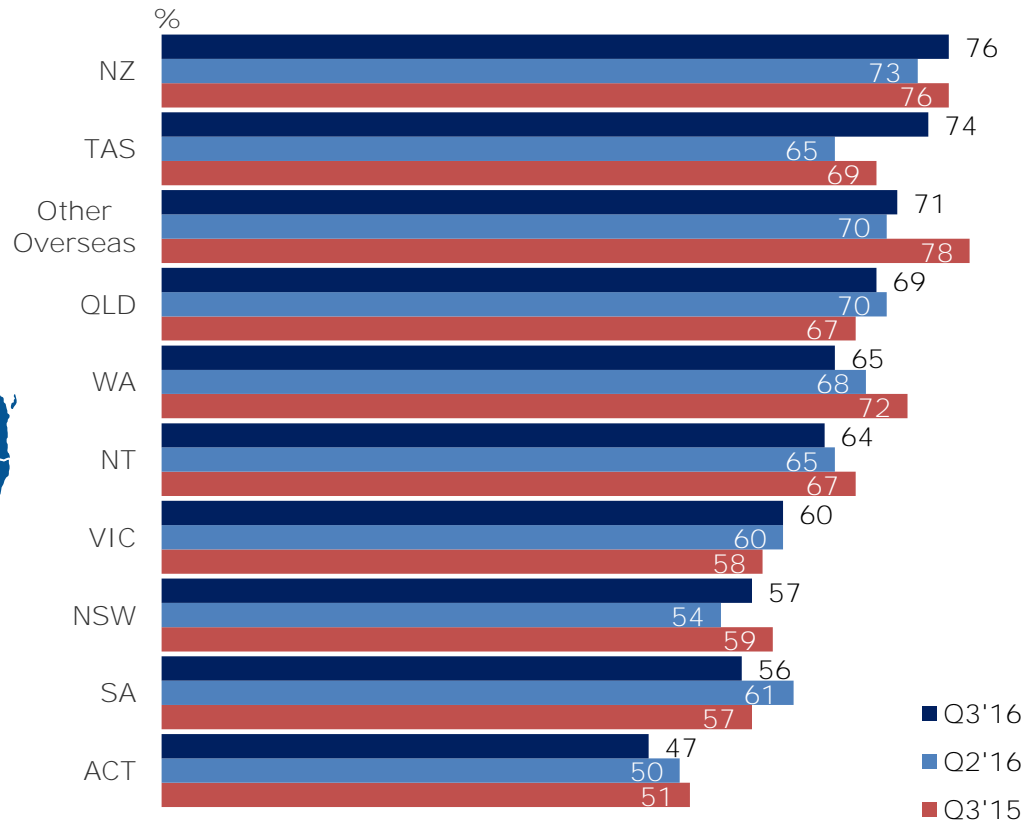
Momentum



Q7. Based on your experience and perceptions of each of the following locations, which of these statements best describes it?

Base: Total n=1504

Recommendation

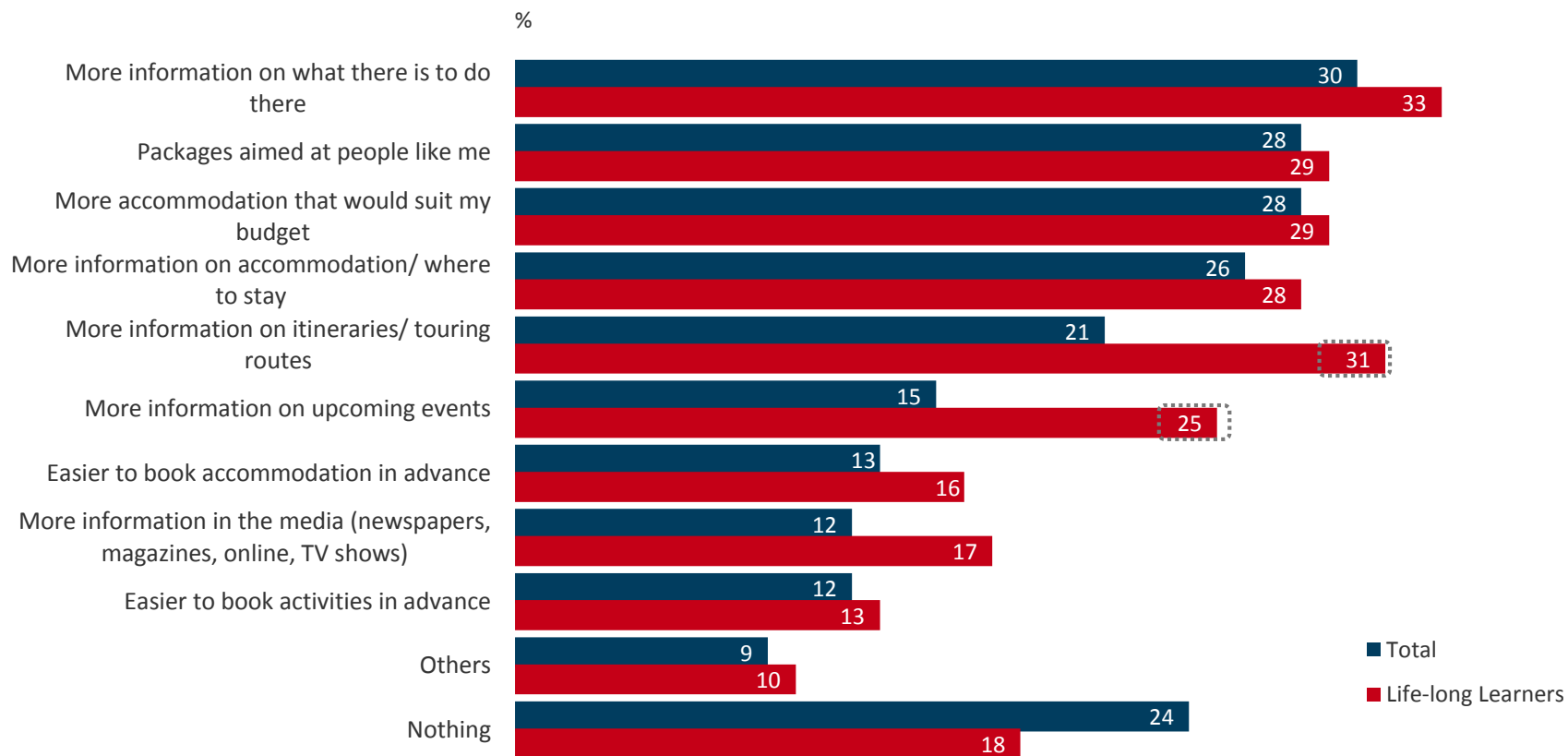


Q6b. Thinking about each of the destinations you have visited for a leisure trip or break in the last 12 months, which of these have you recommended to others? This could be any aspect of the trip, and you may have recommended them to someone you know or online via a consumer review site.

Base: Those that have visited the above destinations in L12M, NSW n=544, VIC n=454, QLD n=495, WA n=159, SA n=185, TAS n=126, NT n=70, ACT n=96, NZ n=151, Other overseas n=367

■ shows significantly different at 95% confidence level

Triggers



Q20c. What, if anything, would make you more likely to book a holiday in Tasmania

Base: Total n=1504, Life-long learners n=163.

☐ shows significantly higher/lower at 95% confidence level



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Please note that the data contained in this report has been prepared for the specific purpose of addressing the items contained in the project contract between **TNS Australia** and **TOURISM TASMANIA**. It may not be suitable for other applications. The use of this data for any other purpose should be discussed with the lead author. TNS accepts no responsibility for unauthorised use of this data by a third party.

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