

# Tourism Info Monitor (TIM)

## Insights from the July – September 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 16 000 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](http://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 2014 include:

### Tasmania's appeal

- The latest TIM results show that around 65 per cent of travelling Australians consider a Tasmanian holiday appealing. This level of appeal was slightly higher than the September quarter last year, and continues to rank the state as the second most appealing Australian travel destination, behind Queensland.
- Around 54 per cent of travelling Australians surveyed in the September 2014 quarter felt that Tasmania is being talked about positively, which is similar to the September quarter last year.
- During the three months to September 2014, over 80 per cent of all respondents who visited the state recommended it to others after their trip. This level of recommendation is similar to New Zealand and other overseas destinations, and ahead of all the Australian states and territories.
- This shows the importance of leveraging Tasmania's high appeal and high level of personal recommendation to raise awareness and attract more visitors to the state.

### People considering travel to Tasmania within the next few years

- The results for the June 2014 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 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.
- When looking at these 'considerers' in more detail, the survey showed that short and long-term consideration to visit Tasmania for a leisure trip was higher among Sydney and Melbourne respondents than the overall Australian travelling population.
- During this period, around 39 per cent of Sydney and Melbourne respondents were considering a visit to Tasmania in the next two to three years, and 22 per cent were considering a visit in the next 12 months.
- Short and long-term consideration for Tasmania is also increasing among younger travellers (25 – 34 year olds). The percentage of respondents in this age group who are considering travel to Tasmania has risen by around 8 per cent from the same quarter last year.

## Media and holiday decision-making

- Between July and September 2014, around 25 per cent of respondents were aware of media relating to holidays in Tasmania. This was 2 per cent lower than the preceding quarter and similar to the same quarter last year.
- Tasmania ranked 2<sup>nd</sup> behind Queensland for media awareness, and continues to compete against destinations like Queensland, NT and the Gold Coast. Tasmania is also followed closely by Victoria, NSW, WA and South Australia.
- 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 17 per cent of survey respondents stating that they had recently read, seen or heard something about Tasmanian holidays via word of mouth. Word of mouth is also rated as an even more important source of ideas and information for those who said they were considering a holiday here.
- The popularity of word of mouth endorsement continues to provide a significant opportunity for local tourism operators to encourage and help visitors to tell their friends and colleagues about their experience.

## Awareness of Tasmanian attractions/places around the state

- Respondents intending to visit Tasmania in the next 12 months showed limited spontaneous awareness of local places and attractions.
- However, when prompted with a list of Tasmanian places and attractions, more than 50 per cent of people who were intending to have a Tasmanian holiday in the next 12 months identified Port Arthur, Cradle Mountain, Salamanca Market, Mount Wellington, Huon Valley, King Island, Queenstown and Flinders Island as Tasmanian places or attractions that they'd heard of.

## 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 48 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 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](http://www.tourismtasmania.com.au/research)