

Tourism Tasmania

Tourism Info Monitor (TIM)

Latest findings on the consumer market
Current: July 2012

www.tourismtasmania.com.au



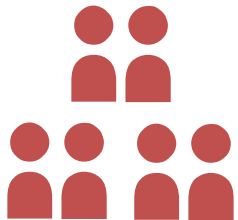
Who we spoke to

Methodology



- Online Tracking Survey
- 500 respondents per monthly wave
(of which at least 40 are Tasmania considerers)
- 12 waves per year

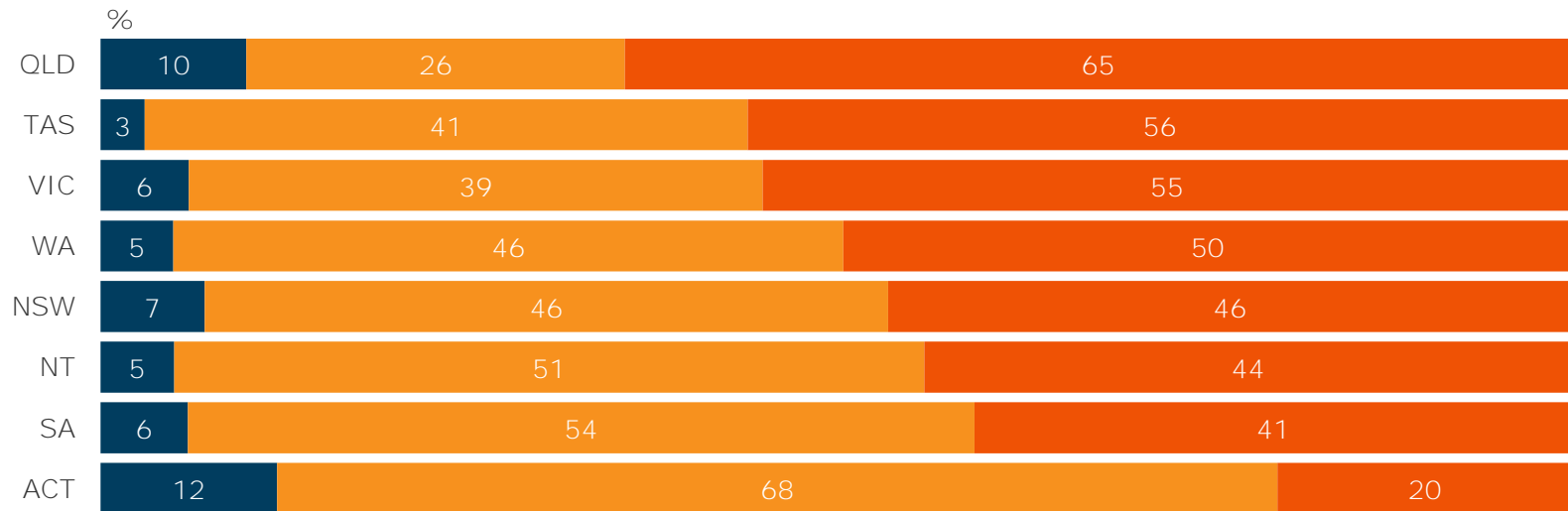
Target Respondents



- 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
- Quarantine implemented for 6 months (Study will not contain responses from same respondents within any 6 month period)

Momentum

Momentum is high, with Tasmania being the second most positively talked about destination



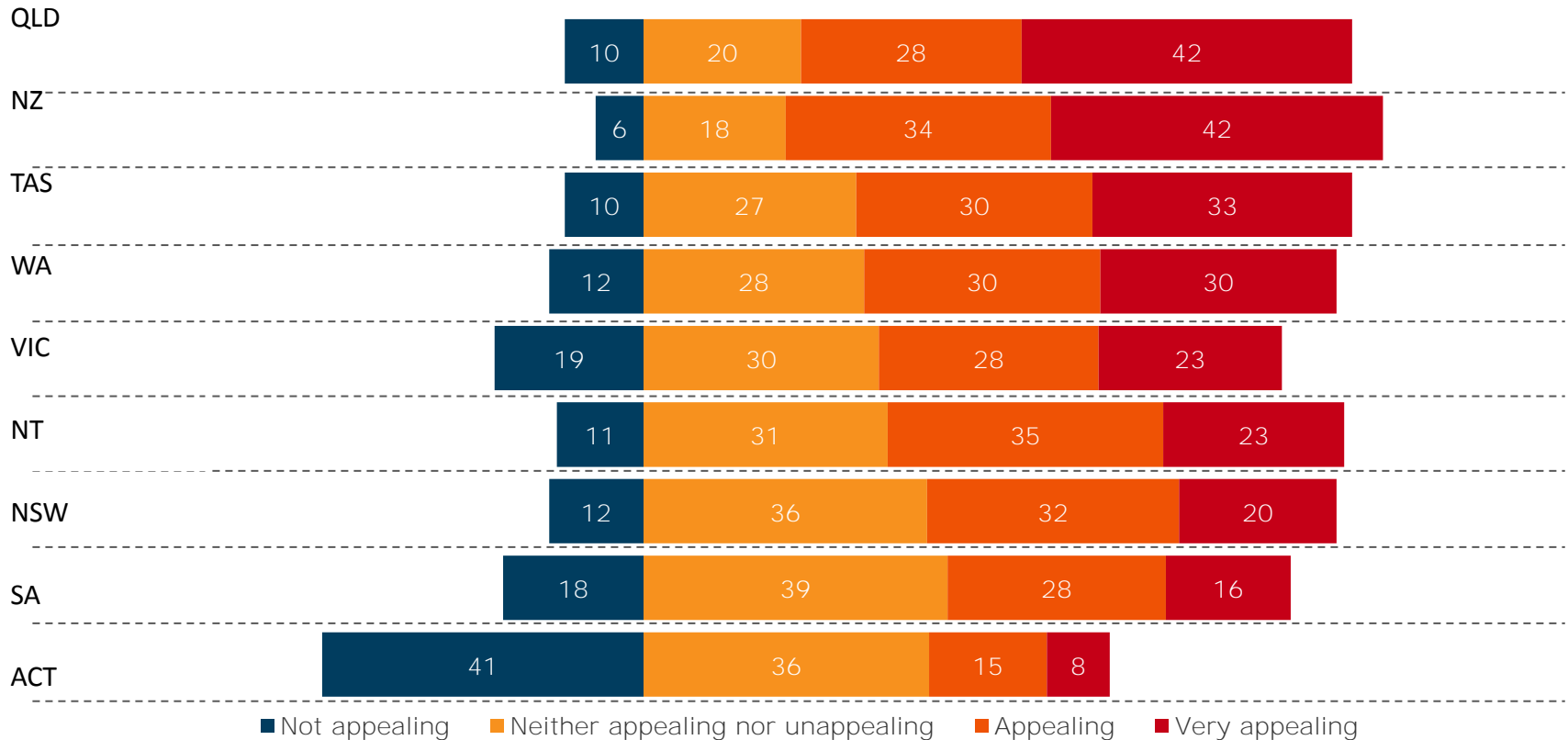
■ ...Is being talked about negatively these days
■ ...is being talked about positively these days

■ Haven't heard anything about this location

Q7. Based on your experience and perceptions of each of the following locations, which of these statements best describes it?
Base: Total n=1519

Appeal of destinations

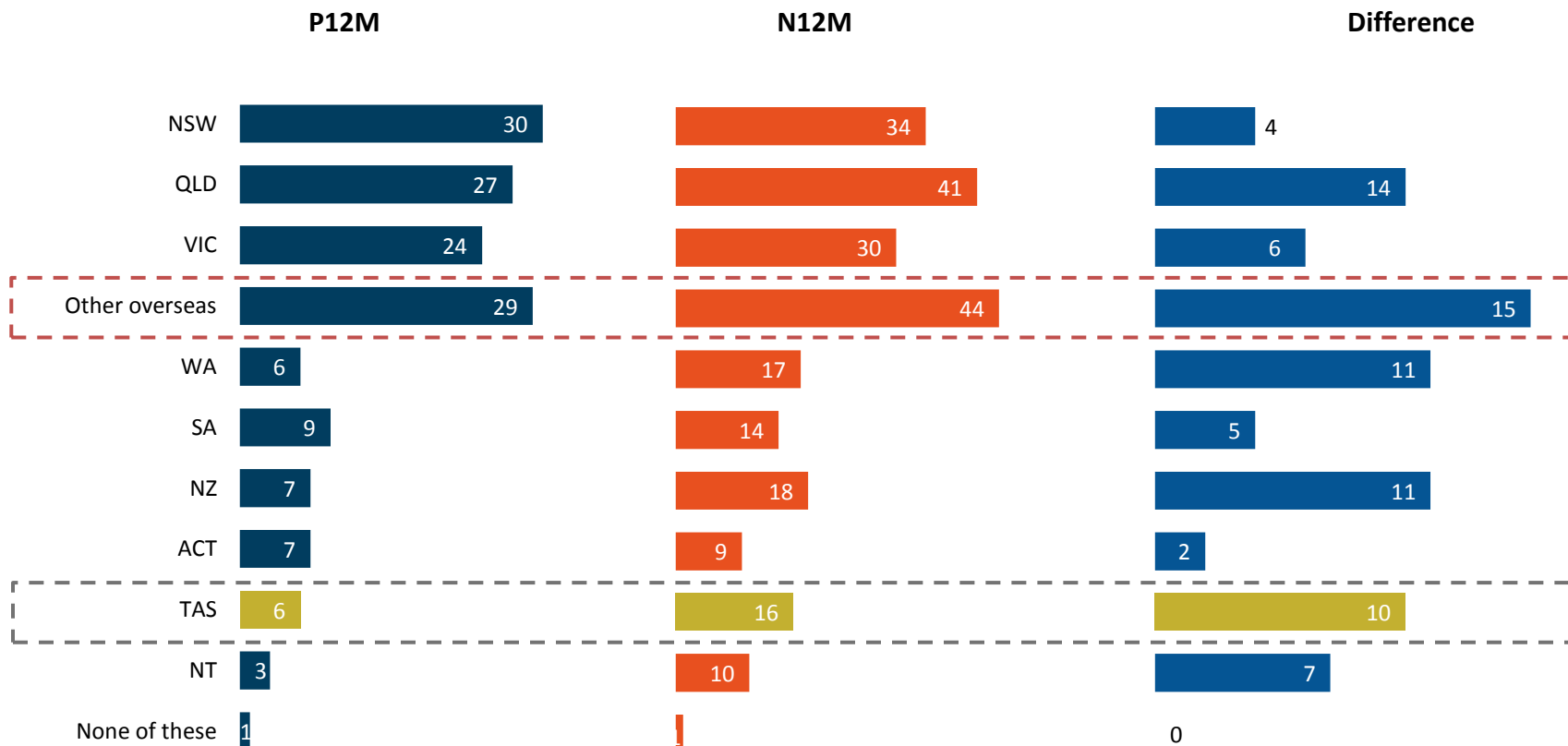
Tasmania has high appeal as a holiday destination, rated only slightly below Queensland and New Zealand



Q19. How appealing is a holiday at each of the following destinations?
Base: Total n=1007 (Each state filtered excluding residents)

Leisure visits - past vs. future visits

Tasmania is an aspirational destination when comparing visitation vs. consideration



S2b-Which of the following destinations have you visited in the past 12 months for a leisure holiday or break? S3b-Which of the following places are you considering visiting in the next 12 months for a holiday or break? Base: S2b-all have travelled within the state, to another state or overseas for a holiday or a break in the past 12 months (n=833); S3b-Those that are considering a trip in N12M (n=949)

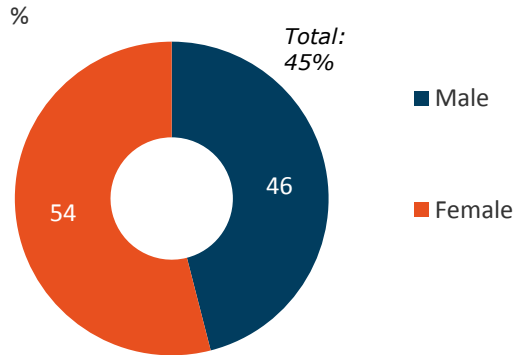
Who is looking to travel to Tasmania?

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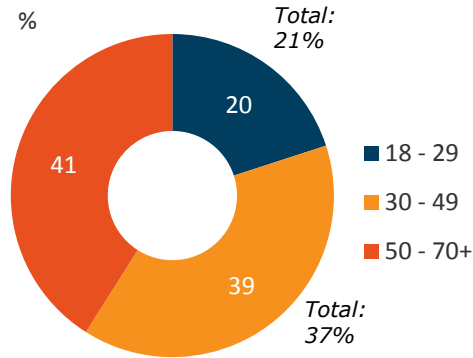


Considering Tasmania in next 12 months

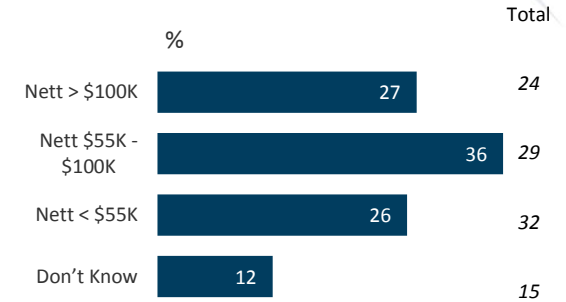
Gender



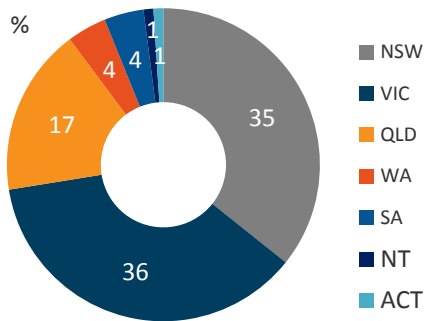
Age



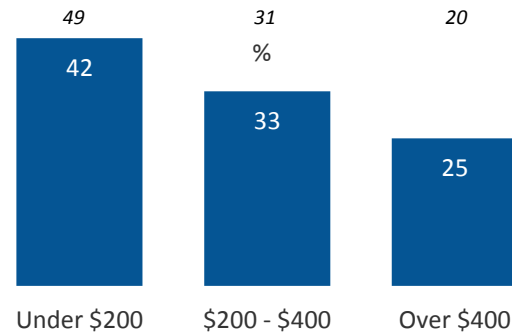
Household Income



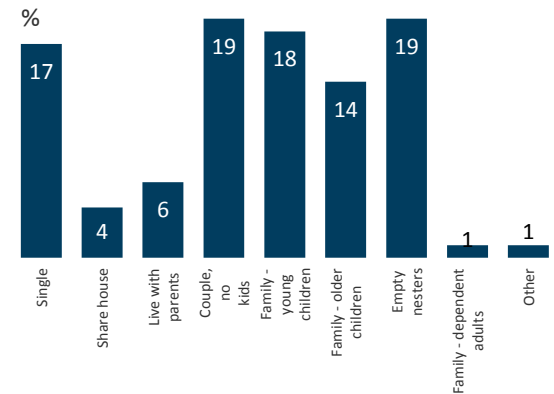
Location



Daily spend – last holiday

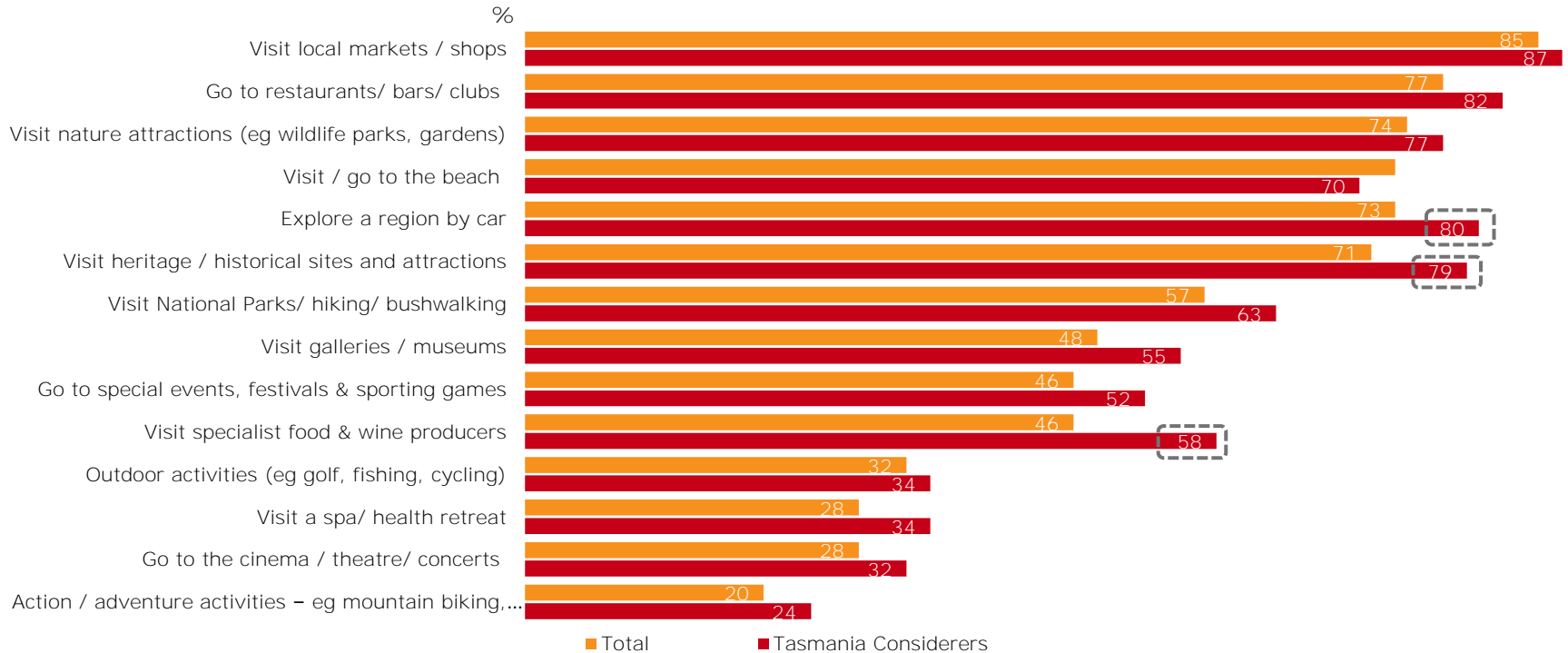


Life stage



Source: S5-Gender; S4-Age; D4-Current household combined income before tax; Q18-How much did you spend per day/night on your last leisure holiday or break?
 D1-Which of the following best describes the structure of the household you live in?; S1 Where do you currently live?
 Base: all are considering visiting Total (n=1519),TAS NI2M(n=225)

Preferred activities while on holiday



Q9. Which of the following activities do you like to do whilst on holiday?

Base: All respondents (n=1519); TAS Considerers (n=264)

shows significantly higher at 95% confidence level

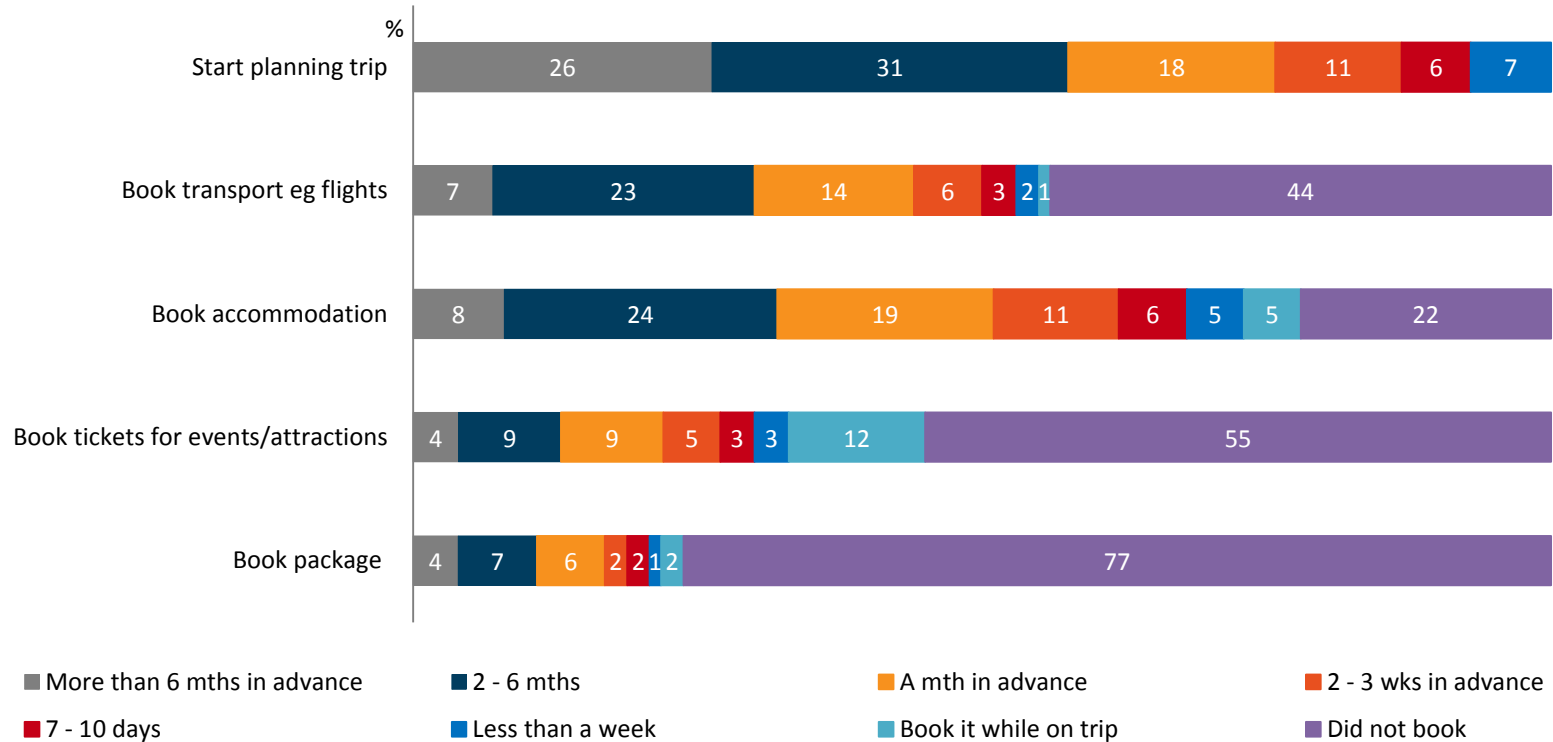
Decision-making process

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Decision-making process

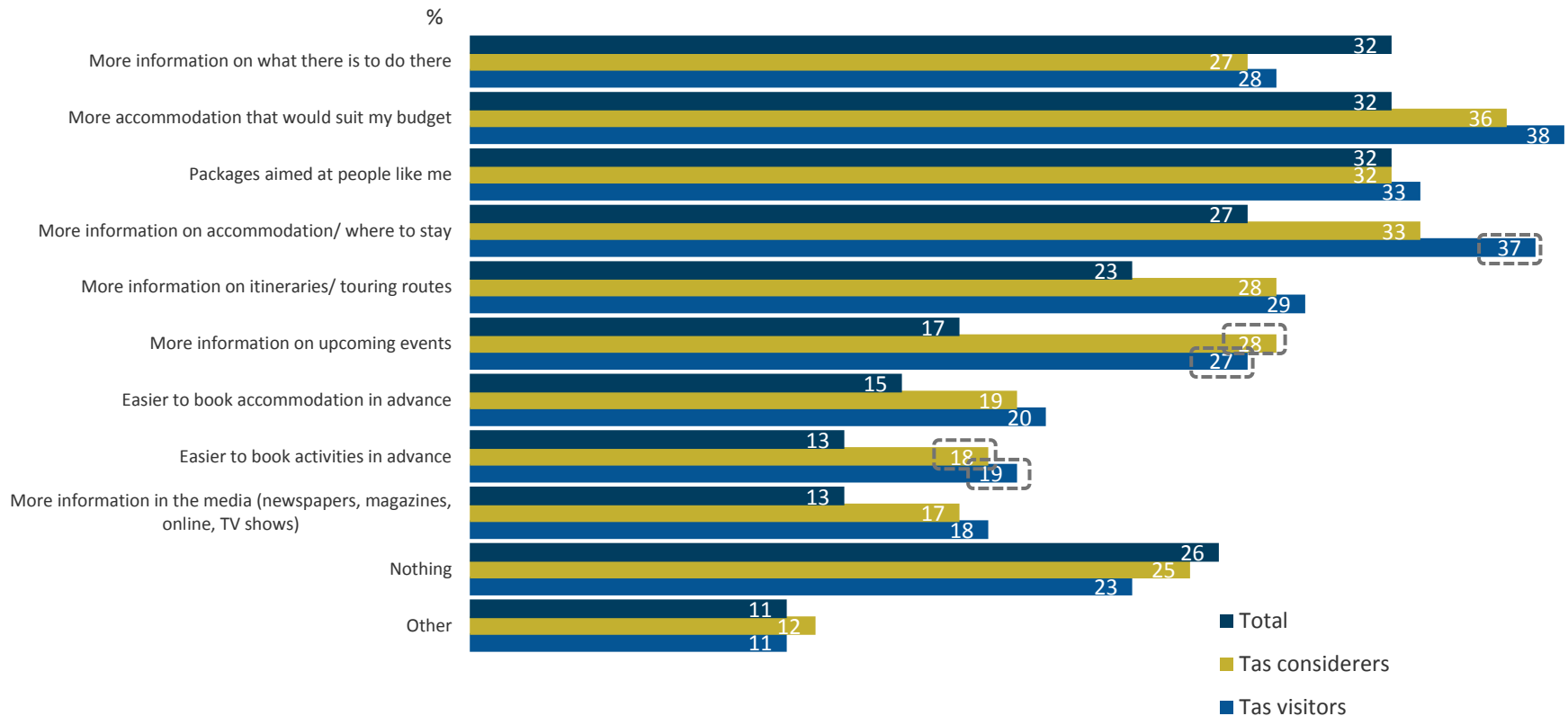
Trip planning usually happens more than 2 months in advance, while booking flights/ accommodation is usually done nearer to the trip



Q13. And how long in advance of your trip did you:
Base: Total n=1519

Triggers

Those considering Tasmania would be more likely to visit if there were more options suited to their budget, and accessible information on planning their trip



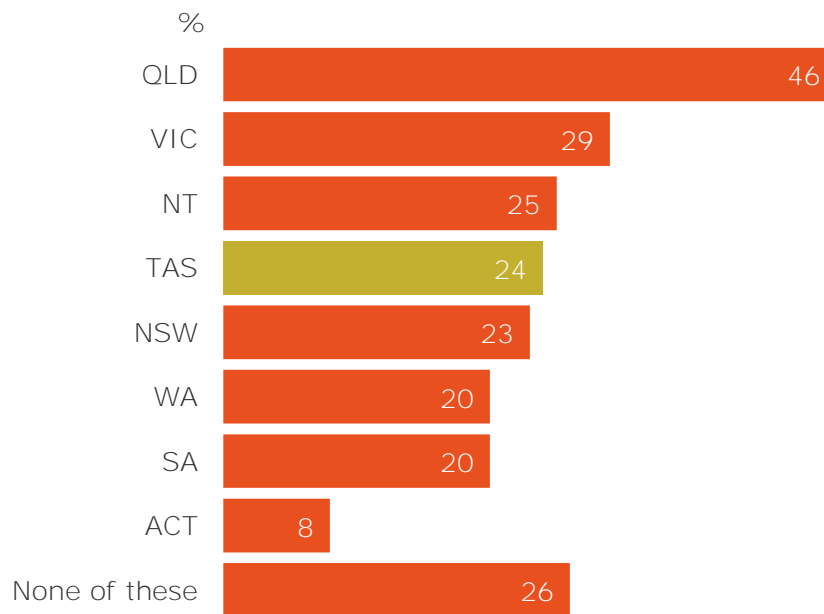
IQ20c. What, if anything, would make you more likely to book a holiday in Tasmania
 Base: Total n=1519, TAS considerers n=264, TAS Visitors n=225
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Advertising awareness


www.tourismtasmania.com.au



Advertising awareness by state

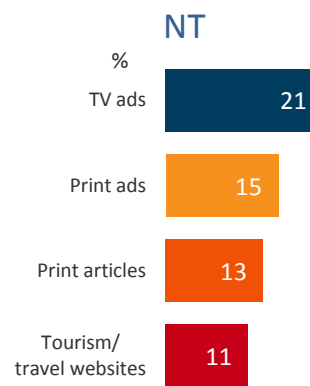
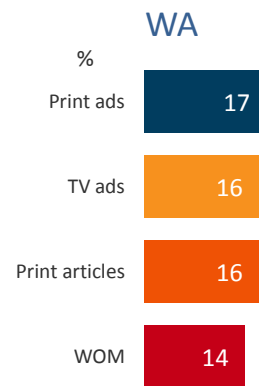
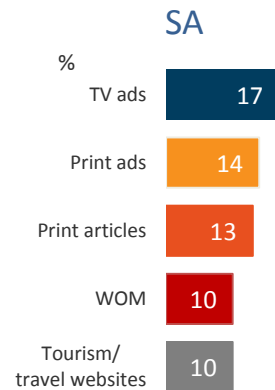
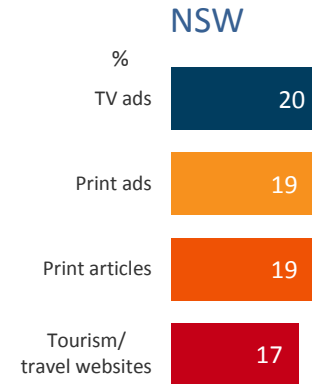
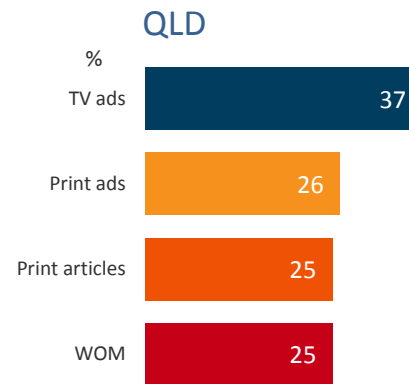
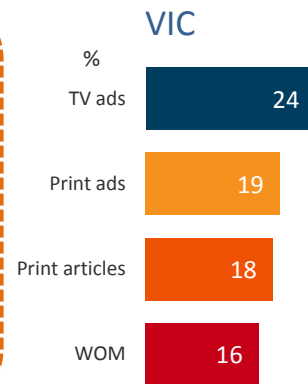
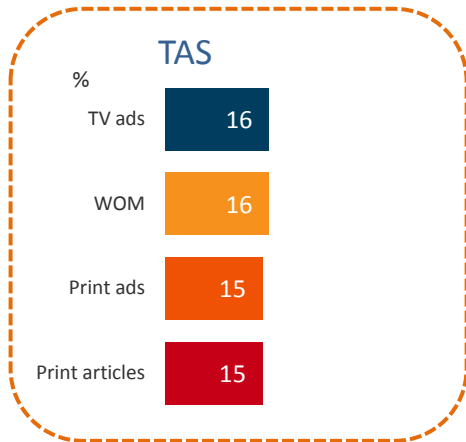


Q2. Please indicate which, if any, of the following state(s) or territory(s) you have recently seen, heard or read anything about in relation to holidays. Base: Total Q1 (n=1007), Q2 (n=1519)

 shows significantly higher at 95% confidence level

Top 4 media channels (at state level)

Word Of Mouth (WOM) is particularly strong for Tasmania



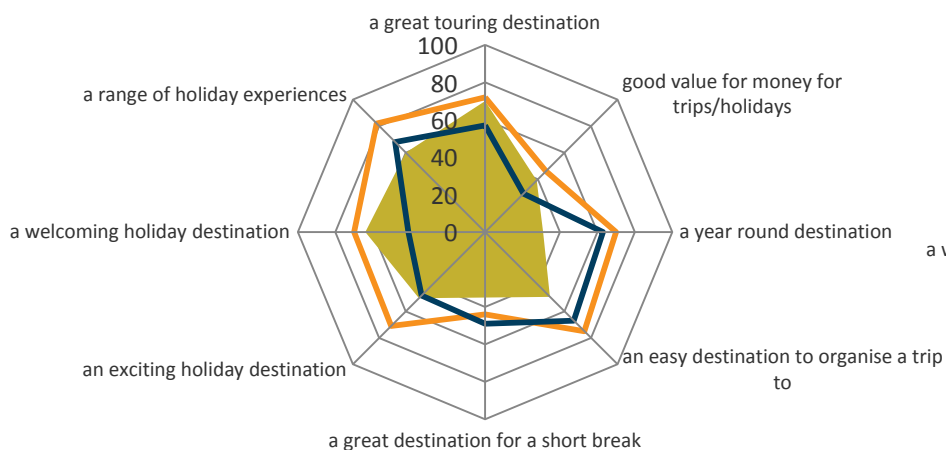
Q4. There are many ways, means and channels through which you might get ideas and information about where to visit for a holiday within Australia. Here is a list of possible ways in which you might find ideas and information about where to visit for a holiday. Please look at each channel in turn, and 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 n=1519

Holiday elements – Tasmania vs top 2 performers

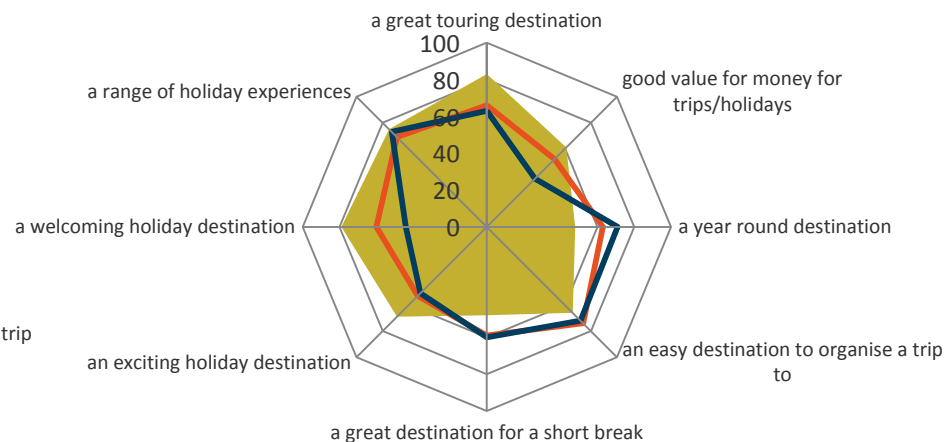
Tasmania performs quite well as a great touring destination, but less strongly in other areas, although considerers perceive it to be more welcoming and exciting.

All Respondents



■ TAS ■ QLD ■ NSW

TAS Considerers



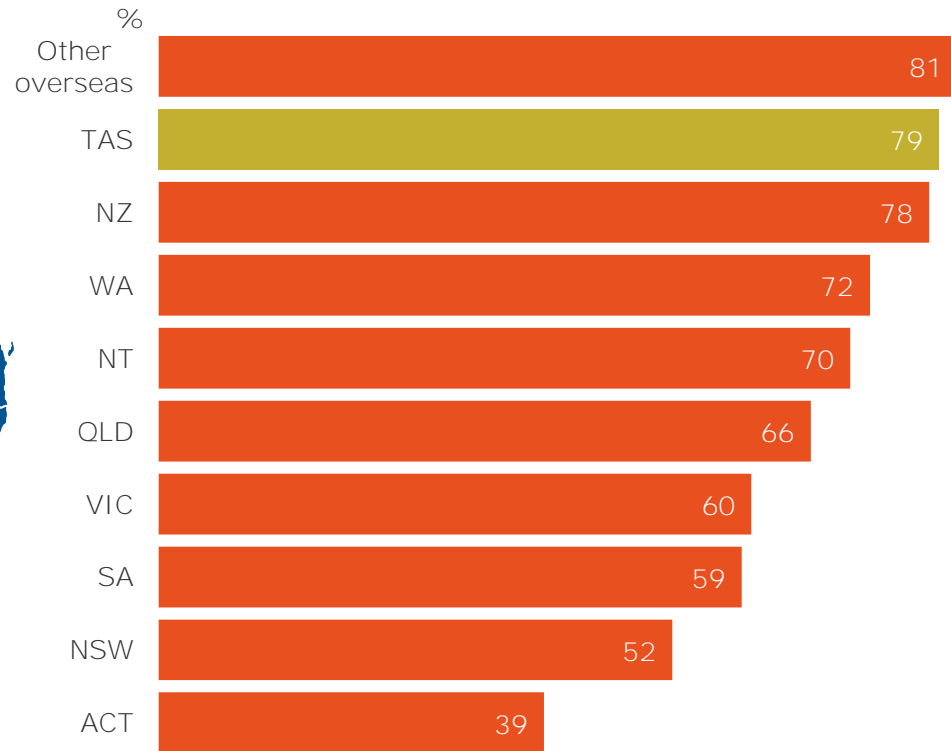
■ TAS ■ VIC ■ NSW

Q8. Please indicate how much you agree or disagree with the following statement about (Destination) using a scale, where '1' strongly disagree and '5' means strongly agree.

Base: All Respondents: TAS(n=1519), QLD(n=501), NSW(n=510); TAS Considerers: TAS(n=264), VIC(n=91), NSW(n=75)


Personal recommendations

Word of mouth and personal recommendation generated for Tasmania is high, with overseas destinations (excluding NZ) being talked about only slightly more.



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=516, VIC n=428, QLD n=445, WA n=151, SA n=148, TAS n=76, NT n=50, ACT n=87, NZ n=94, Other Overseas n=372

 shows significantly higher at 95% confidence level

To find out more

This presentation is just a brief overview of the information TIM can provide

Full results

- The full set of TIM results will be available on Tourism Tasmania's website from mid-August 2012
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Round-table workshops

- Beginning in late August, Tourism Tasmania will conduct a series of round-table workshops to present the TIM results in detail
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What can I learn?

- The workshops will provide a detailed understanding of the TIM research
- Tourism Tasmania's specialist staff will be available to discuss the results and how this information can assist with decision-making