

Tourism Info Monitor (TIM)

Insights from the January - March 2013 survey period

The Tourism Info Monitor is a regular quarterly survey by Tourism Tasmania of around 1 500 'travelling' Australians (people who have taken a holiday in the last 12 months or are considering a holiday in the next 12 months).

TIM helps us to better understand Tasmania's performance as a holiday or leisure destination, and provides insights into the views, behaviours and characteristics of 'travelling' Australians. These insights are used by Tourism Tasmania to measure and inform our marketing activity and are used by tourism operators to assist in their business planning.

Below are some high-level facts and comments relating to the 2013 January quarter TIM report. The charts relating to the summary can be found within the TIM First Quarter 2013 Survey Results report published on our website.

Appeal

- The latest TIM results for the quarter continue to show that the appeal of a Tasmanian holiday remains high, and even grew by 2 per cent in the March 2013 quarter. Around 67 per cent of travelling Australians found the idea of a Tasmanian holiday appealing, making the state the second most appealing Australian travel destination.
- Tasmania's appeal has grown slightly (by about 4 per cent) over the past three quarters, however it has remained consistently high in the mid-60 per cent area since the quarterly TIM surveys began.
- 79 per cent of people who visited Tasmania for a holiday in the past 12 months said that they had recommended Tasmania to others, and this percentage has remained stable since the beginning of 2012.
- While fewer travelling Australians regard Tasmania as a great all-year round or short break holiday destination compared with some other domestic destinations, the TIM research shows that the state is considered as a welcoming destination and a great place for touring.
- ***The latest TIM survey for the March 2013 quarter shows that Tasmania's appeal as a holiday destination has remained relatively high and stable over the past year.***

Considering travel to Tasmania within the next few years

- The latest results for the March 2013 quarter show that around 33 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years.
- The latest results for the period from January to March show that 16 per cent of travelling Australians are considering coming to Tasmania for a leisure trip in the next twelve months.
- ***While the Tasmanian bushfires in January certainly impacted on businesses in the state and in particular the bushfire-affected areas, the bushfires have had little impact interstate on the perceptions of Tasmania, its appeal, or the intentions of travelling Australians to visit the state.***
- ***None the less, the fact that around 16 per cent of travelling Australians are considering coming to Tassie in the next 12 months, yet a smaller percentage actually came in the last year, shows that converting the high level of consideration into actual travel remains an ongoing priority.***
- ***The current and previous quarters continue to show that the people who are considering visiting Tasmania within the next few years are more likely than other travelling Australians to be interested in specific experiences wherever they are holidaying. These include visiting natural and heritage attractions, visiting specialist food and wine producers, and exploring places by car.***

Trip length and travel party

- The latest results for the March 2013 quarter show that around 50 per cent of all last holiday trips were between 2 and 5 nights. A further 30 per cent were between 6 and 13 nights.
- The TIM results also show that 60 per cent of all holiday trips taken were as a couple. The balance was mainly taken up by trips with other family members, children or friends. Around 8 per cent travelled alone.
- **Domestic travel currently fulfils a key role in Australian's busy family life – the chance to have a break from normality, a moment to recharge and refresh and/or an opportunity to reconnect. For that reason, holidays tend to be a mix of planned and spontaneous trips, spread across the calendar.**

Competition and media

- The latest TIM research continues to show that travellers who are considering coming to Tasmania for a holiday also look at many other domestic holiday destinations when looking at where to go for their holiday.
- We continue to be part of a broad repertoire of potential destinations to visit, so the goal is to give those people who are considering travel to Tasmania a reason why they should choose us over the other options.
- Tasmania competes for advertising awareness against a tight field which includes Victoria, the Northern Territory and NSW.
- However, unlike these destinations, word of mouth* endorsement or advocacy plays a more significant role in promoting Tasmania...and the number of people who heard about Tasmania through word of mouth in the March 2013 quarter, was greater than previous quarters.
- **The combination of word of mouth and social media provides a great opportunity for local tourism operators to inspire customers to use social media while they're in the state to tell their friends and colleagues about their holiday experiences.**

Holiday decision-making

- TIM research for the March 2013 quarter also reaffirms the important role that word of mouth* and other forms of third-party endorsement or commentary play in the travel decision-making of Australians who have Tasmania on their holiday 'wish list'.
- Almost a third of all travelling Australians who are currently considering a holiday in Tasmania decided where to go to for their last holiday based on the recommendations of their friends and/or family members.
- The holiday destination choices of people who have Tassie in their list of options were also more likely to be influenced by special deals/packages, TV programs and magazine stories about a destination, but to a much lesser extent than the recommendations of family and friends.
- Around 85 per cent of all travelling Australians planned their last trip independently and without help from a travel agent. Those who visited Tasmania for their last holiday were slightly more likely than other travellers to book some aspect of their trip via a travel agent or purchase a package/deal.
- **Research and bookings are moving towards direct sources, strongly driven by the growing role of the online environment. The role of word of mouth is also increasing and the importance of online tools including social media will only get stronger.**
- **This has significant implications for the way we communicate now and into the future with our customers and our target audience, and how we convert positive intentions into actual travel and bookings.**

* **'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