

Tourism Info Monitor (TIM)

Insights from the April – June 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 14 500 travelling Australians have been surveyed. Below are some high-level facts and comments relating to the TIM report for the second quarter 2014, 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 April to June 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 remains high and continues to rank the state as the second most appealing Australian travel destination, behind Queensland.
- Around 58 per cent of travelling Australians surveyed in the June 2014 quarter felt that Tasmania is being talked about positively. This is down slightly on the first quarter in 2014.
- Recommendation for Tasmania has recovered back to previous levels and is up on the same period last year – continuing to leverage this positive 'word of mouth' is an important method for increasing awareness and visitation.

People considering travel to Tasmania within the next few years

- The results for the June 2014 quarter show that around 31 per cent of travelling Australians are considering a visit to Tasmania in the next two to three years. This is down slightly from the same period last year.
- Around 18 per cent of travelling Australians said they are considering visiting Tasmania for a leisure trip in the next twelve months, which is similar to the previous quarter.
- In recent years, Tourism Tasmania has focussed its marketing effort on a segment of the Australian population which have been dubbed 'Life Long Learners'. They mainly live in metropolitan areas of the Eastern Seaboard of Australia and when they go on holidays they prefer less crowded, more interesting places. Their reasons for taking a holiday are 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 a larger proportion of 'Life Long Learners' included Tasmania on their list of considered destinations. Specifically, around 40 per cent of this segment are considering a visit to Tasmania in the next 2-3 years, and around 22 per cent are considering a holiday in Tasmania in the next twelve months.
- International destinations continue to be the most popular travel choices for those considering a holiday in the next twelve months, followed by Queensland, New South Wales, Victoria and Tasmania. Consideration of travel to Tasmania remains stable and is ahead of Western Australia, South Australia and New Zealand.

Media and holiday decision-making

- Awareness of destination advertising for Tasmania between April and June 2014 decreased slightly to 27 per cent, although similar to the same quarter last year.
- TV advertising are the primary communication channel for Tasmania and all other domestic destinations. Word of mouth still remains an important channel for Tasmania, with 19 percent of survey respondents had recently read, seen or heard something about Tasmanian holidays via word of mouth.
- TV advertising and word of mouth* endorsement or advocacy remained the key sources of ideas and information about Tasmanian holidays, and even more so for those considering Tasmania for a holiday.
- Information on activities and accommodation, events and itineraries and touring routes are key drivers to visitation for Life Long Learners, as well as the ability to book these in advance.

Awareness of Tasmanian attractions/places around the state

- Cradle Mountain, MONA, Hobart, Port Arthur, and Launceston are major attractions for people that have visited Tasmania.
- Among intended visitors, there is much lower awareness of some key attractions, such as MONA, Cradle Mountain and Wineglass Bay.

* **'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