TICT Workshop – Finding and using research for your business

Research & Insights - Tourism Tasmania

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Tourism Tasmania’s Research & Insights Program

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The Tourism Tasmania Research Team

Paul
Marketing Insights Specialist
TRIG, Stats analytics, Data expert, Consumer insights specialist, Campaign evaluations, quarterly reporting.

Sarah
Marketing Research Specialist
Brand project, Procurement and budget management, quarterly reporting.

Bianca
Tourism Research Officer
Research queries, Unordinary Adventures, NZ project and quarterly reporting.

Allison
Manager
Segmentation, Recovery working group, Journeys project.

Throw me your questions.

(and I'll do my best to answer them)

Throw me your questions

- What you'd like to hear today
- Any burning tourism research questions
- Questions on our program
- Any unrelated questions

Finding what you need.

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Finding what you need.

- Visitor information
- What people do in Tasmania?
- Knowing our people
  - What do they need out of a holiday?
  - What experiences do they value?
- What is it about us that is special?
- What is Tourism Tasmania's Brand so I can align with it?

The tip of the iceberg...

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Visitor Profile.

TOURISM SNAPSHOT

Top line figures:

- Total numbers/nights/spend
- Purpose of visit
- Regions visited
- Mode of travel
- Origin of visitors
- Intrastate visitation
- Quarterly performance

Resource:
https://www.tourismtasmania.com.au/__data/assets/pdf_file/0009/87345/2019-Q4-Tasmanian-Tourism-Snapshot-TVS,-IVS,-NVS.PDF

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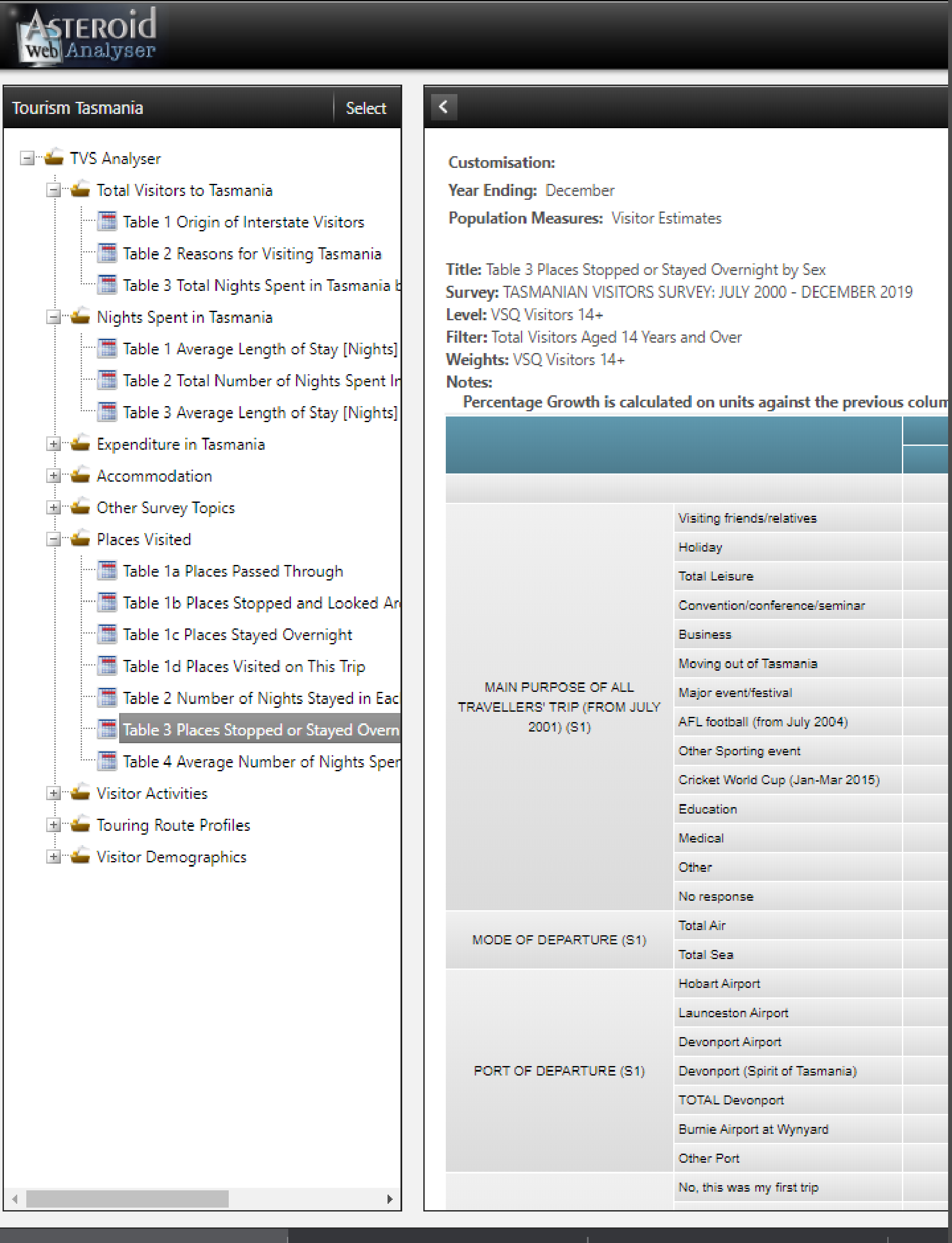

Visitor Profile.

TVS ANALYSER

Going below the surface:

- Total numbers/nights/spend
- Purpose of visit
- Accommodation used
- Activities undertaken
- Places stopped/stayed/passed through
- Average number of nights spent in each place
- Demographics of visitors

Resource:
http://www.tvsanalyser.com.au/

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International Visitor Profile.

TOURISM RESEARCH AUSTRALIA

Below the surface on International figures:

- International Visitor Survey results
- Specific market information
- Regional Profiles
- Other economic contribution information

Resource:
https://www.tra.gov.au/International/international-tourism-results

Need to go deeper?

RESEARCH INBOX

Going deeper:

- Digging in the data for specific answers to specific questions

Resource:

Research@tourism.tas.gov.au

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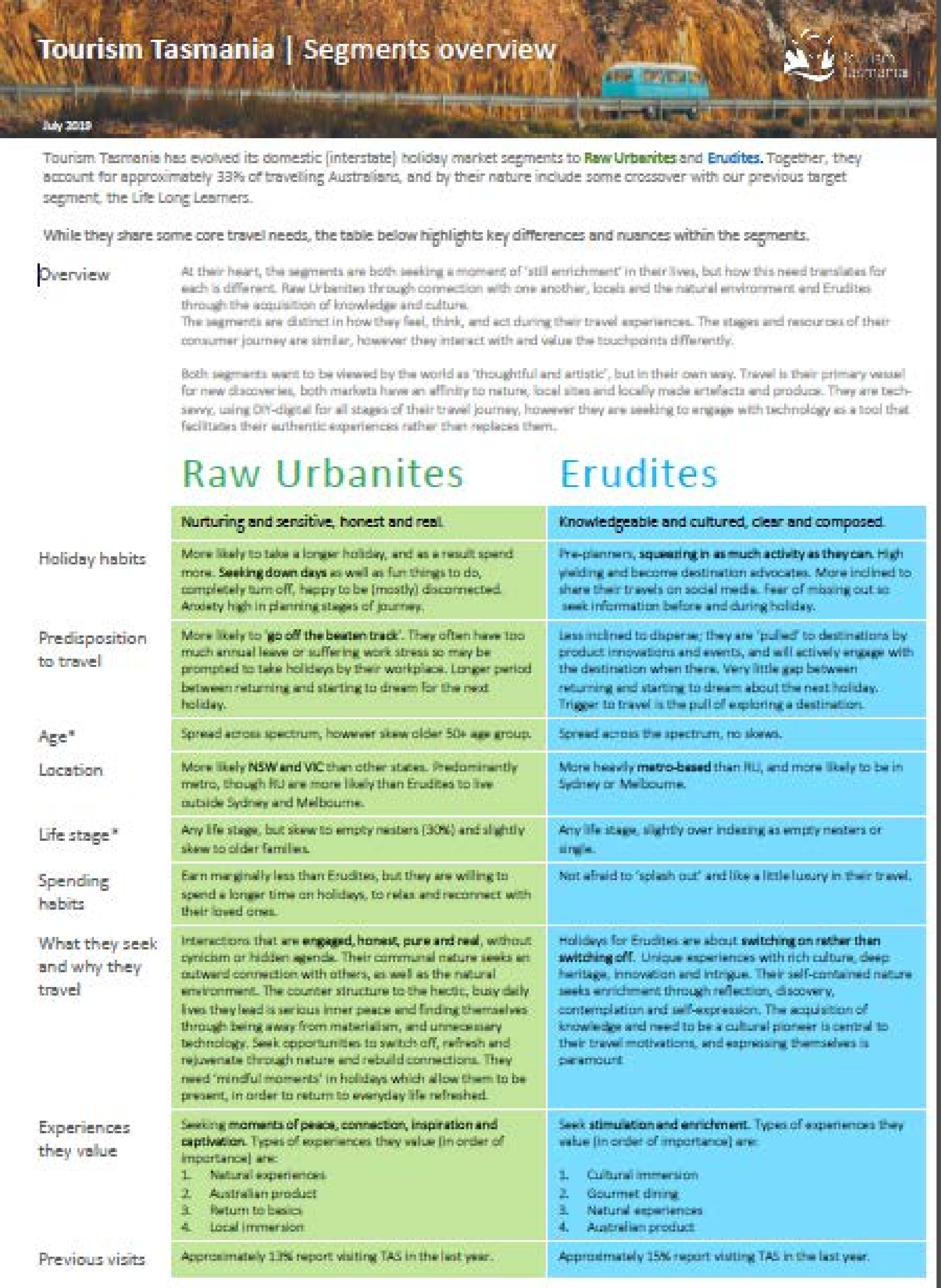
Tourism Tasmania | Segments overview

July 2019

Tourism Tasmania has evolved its domestic (interstate) holiday market segments to **Raw Urbanites** and **Erudites.** Together, they account for approximately 33% of travelling Australians, and by their nature include some crossover with our previous target segment, the Life Long Learners.

While they share some core travel needs, the table below highlights key differences and nuances within the segments.

Overview

At their heart, the segments are both seeking a moment of 'still enrichment' in their lives, but how this need translates for each is different. Raw Urbanites through connection with one another, locals and the natural environment and Erudites through the acquisition of knowledge and culture.
The segments are distinct in how they feel, think, and act during their travel experiences. The stages and resources of their consumer journey are similar, however they interact with and value the touchpoints differently.

Both segments want to be viewed by the world as 'thoughtful and artistic', but in their own way. Travel is their primary vessel for new discoveries, both markets have an affinity to nature, local sites and locally made artefacts and produce. They are tech-savvy, using DIY-digital for all stages of their travel journey, however they are seeking to engage with technology as a tool that facilitates their authentic experiences rather than replaces them.

	Raw Urbanites	Erudites
	Nurturing and sensitive, honest and real.	**Knowledgeable and cultured, clear and composed.**
Holiday habits	More likely to take a longer holiday, and as a result spend more. **Seeking down days** as well as fun things to do, completely turn off, happy to be (mostly) disconnected. Anxiety high in planning stages of journey.	Pre-planners, **squeezing in as much activity as they can.** High yielding and become destination advocates. More inclined to share their travels on social media. Fear of missing out so seek information before and during holiday.
Predisposition to travel	More likely to '**go off the beaten track**'. They often have too much annual leave or suffering work stress so may be prompted to take holidays by their workplace. Longer period between returning and starting to dream for the next holiday.	Less inclined to disperse; they are 'pulled' to destinations by product innovations and events, and will actively engage with the destination when there. Very little gap between returning and starting to dream about the next holiday. Trigger to travel is the pull of exploring a destination.
Age*	Spread across spectrum, however skew older 50+ age group.	Spread across the spectrum, no skews.
Location	More likely **NSW and VIC** than other states. Predominantly metro, though RU are more likely than Erudites to live outside Sydney and Melbourne.	More heavily **metro-based** than RU, and more likely to be in Sydney or Melbourne.
Life stage*	Any life stage, but skew to empty nesters (30%) and slightly skew to older families.	Any life stage, slightly over indexing as empty nesters or single.
Spending habits	Earn marginally less than Erudites, but they are willing to spend a longer time on holidays, to relax and reconnect with their loved ones.	Not afraid to 'splash out' and like a little luxury in their travel.
What they seek and why they travel	Interactions that are **engaged, honest, pure and real**, without cynicism or hidden agenda. Their communal nature seeks an outward connection with others, as well as the natural environment. The counter structure to the hectic, busy daily lives they lead is serious inner peace and finding themselves through being away from materialism, and unnecessary technology. Seek opportunities to switch off, refresh and rejuvenate through nature and rebuild connections. They need 'mindful moments' in holidays which allow them to be present, in order to return to everyday life refreshed.	Holidays for Erudites are about **switching on rather than switching off.** Unique experiences with rich culture, deep heritage, innovation and intrigue. Their self-contained nature seeks enrichment through reflection, discovery, contemplation and self-expression. The acquisition of knowledge and need to be a cultural pioneer is central to their travel motivations, and expressing themselves is paramount
Experiences they value	Seeking **moments of peace, connection, inspiration and captivation.** Types of experiences they value (in order of importance) are: 1. Natural experiences 2. Australian product 3. Return to basics 4. Local immersion	Seek **stimulation and enrichment.** Types of experiences they value (in order of importance) are: 1. Cultural immersion 2. Gourmet dining 3. Natural experiences 4. Australian product
Previous visits	Approximately 13% report visiting TAS in the last year.	Approximately 15% report visiting TAS in the last year.

Knowing our people.

SEGMENT PROFILES

Raw Urbanites and Erudites:

- Holiday habits
- What they seek and why they travel
- Experiences they value
- Other information

Resource:

Research@tourism.tas.gov.au

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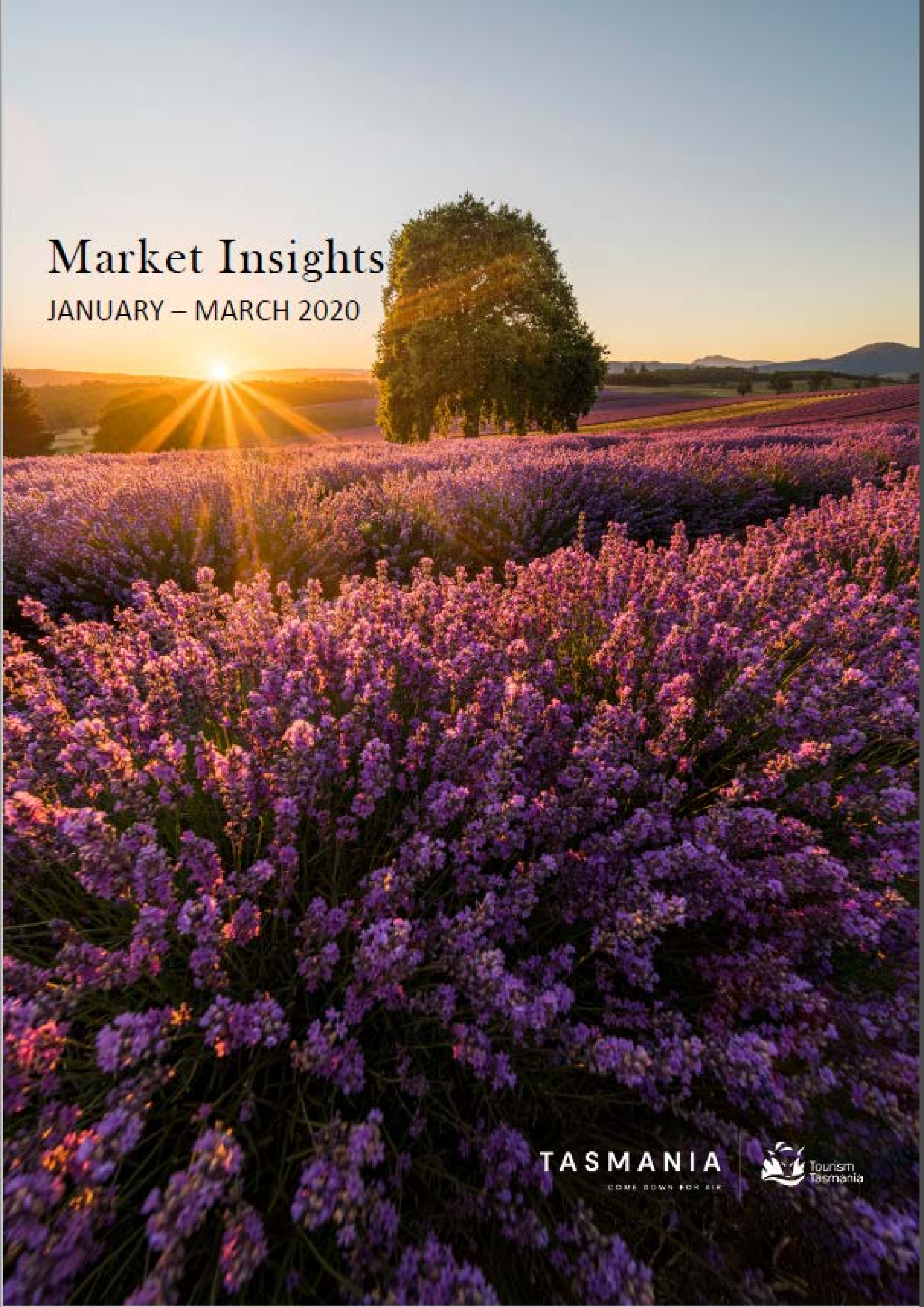

Knowing our people.

TIM MARKET INSIGHTS

Consumer insights:

- How our offering compares with other states
- Our brand power
- The customer journey

Resource:
Research@tourism.tas.gov.au

Tasmania's Customer Journey

PASSIVE DREAMING: Locations, experiences, or events that are of interest to travel to and experience in life and are always in the back of my mind.

ACTIVE DREAMING: The start of the journey. Life is making me want to take a holiday - it is not destination-based yet but based on the push or pull factors in my life. Realistically, I'm not going to invest my time in planning yet as it's too far out.

CONSIDERATION: I have identified a need and have a rough idea for a holiday. There are a number of destinations that I've dreamed about that I think will answer my needs and relieve tensions.

VALIDATION: I need to make sure the destinations on my shortlist are appropriate, will fulfil my needs and address any tensions. Personal research starts here to understand more about the destinations.

PLANNING: I need to understand the ins and outs – what are the accommodation options, how do I get there, what can I do when I'm there?

BOOKING: It's time to book and commit to my holiday. While it's very transaction-based, excitement and exhaustion come into play and there is relief when I'm able to finally book the holiday.

ANTICIPATION: The lead up to my trip. This could be both exciting and stressful.

EXPERIENCING: I'm enjoying being in the moment and want to know what I can do (or what more I can do) while I'm here. Some may be worried they are missing out.

POST-TRIP: I have arrived home. The holiday continues post-trip, and while some re-live moments privately, others share more widely. When I reflect back, did this holiday fulfil my needs/resolve tensions? Was it the escape I wanted? Where should I go next?

Our brand.

BRAND INFORMATION FOR THE TOURISM INDUSTRY

- Our brand
- How to use Come Down For Air
- Being a brand ambassador
- Our tone of voice

Resource:
https://www.tourismtasmania.com.au/__data/assets/pdf_file/0019/86014/Industry-Brand-Information-Sheet.pdf

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Our campaigns.

TOURISM TASMANIA CAMPAIGNS

- Latest campaigns
- TV campaigns

Resource:

https://www.tourismtasmania.com.au/marketing/campaigns/brand-launch

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Hot off the press.

The week in review

COVID-19 insights by Tourism Tasmania

Edition 8 | the week to 5 June, 2020

Overall observations

1 We're missing 'normal'
While we're missing some aspects of our old 'normal', particularly seeing friends and family, and travelling, the lockdown period has renewed enthusiasm for what we previously took for granted, prompting widespread enjoyment at the opportunity to reconnect.

2 Confidence on the up
Consumer confidence and optimism continues to improve, but we're concerned the 'worst is still to come'; however, we're actively planning holidays and letting ourselves feel more positive about the future.

3 Economy concerns remain
Concern for Australia's economy has not abated in the same way as our other worries; almost two thirds believe there is worse economic impact still yet to come.

Consumer Insights

Tasmania retains favour
Multiple sources confirmed that Tasmania has retained positive favour with travellers, and tops lists for first place to visit when allowed.

A cautious welcome
Across the nation, only **17% of Australians would be happy for interstate visitors to arrive now**, while 26% are happy for visitors to start arriving in the next three months.

Crowds worry us
While we want to get out and about, we're wary of venues and destinations being crowded, mainly because we're not trusting of others to adhere to social distancing.

Destination Responses

New Intrastate campaigns
New campaigns from WA and NSW for the intrastate market to get tourism up and running again.

Travel Bubbles
More countries are talking about having select travel corridors between COVID safe destinations.

Borders easing
Travel restrictions for some international destinations are beginning to end.

COVID-19 Current Scenario

Holiday green light
All states & territories allow overnight holiday intrastate travel. Tourism accommodation & tour operators reopen after months of closures.

Domestic flight boost
Qantas announced additional domestic routes for June & July. For Tasmania, Launceston is set to receive one additional return flight weekly.

Recession looming
According to ABS figures for the March quarter, Australia is heading towards a recession for the first time in 29 years.

The week in review.

COVID-19 INSIGHTS BY TOURISM TASMANIA

Consumer insights:

- Confidence, sentiment, concern, optimism

Destination responses:

- Campaign responses
- Good examples

COVID-19 current scenario

- Border statuses
- Policy responses

Resource:

Research@tourism.tas.gov.au

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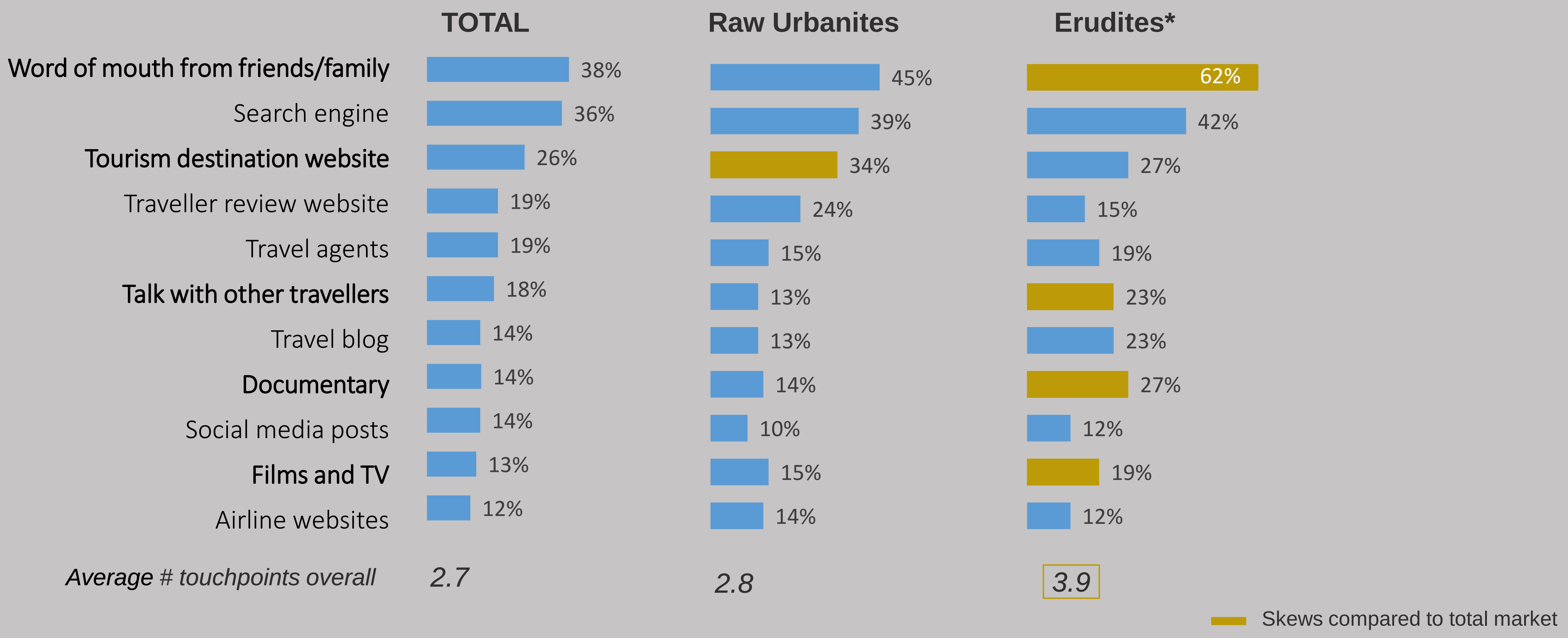
Top consumer touchpoints.

TOP CONSUMER TOUCHPOINTS FOR A DOMESTIC/NZ JOURNEY



Paid media.

MOST NOTICED PAID MEDIA CHANNELS FOR A DOMESTIC/NZ JOURNEY

	TOTAL	Raw Urbanites	Erudites*
Travel TV shows/ documentaries	27%	34%	50%
Ads on TV	26%	27%	46%
Sponsored social media content	12%	10%	8%
TV news coverage / current affairs	11%	11%	23%
Targeted online ads	10%	8%	15%
Outdoor ads	9%	4%	12%
Online ads, banners, pop-ups	9%	6%	8%
Published article/ book/ journal	8%	11%	15%
Recommended content in video streaming sites	7%	7%	4%
Online news coverage/ current affairs	7%	8%	12%
Ads/ paid content in online search	7%	4%	4%
Setting for a movie/ fictional TV show	5%	3%	12%
Cinema ads	5%	8%	15%
Average # paid media aware	*1.6*	*1.5*	*2.4*

Erudites are more engaged overall (helps address their potential FOMO), and have a higher tendency towards touchpoints with narrative

Indicative skews compared to total market

Thank you.