



Motivations Research

Appeal triggers and motivations for tourism in Tasmania

March 2011

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Background

In 2007, Tourism Tasmania undertook a study of Australians' perceptions of Tasmania as a holiday destination. The research reconfirmed that Tasmania's competitive advantage lay in its core nature brand positioning and that this was supported by the state's association with history and heritage, and food and beverages. However, the research also showed a low level of awareness of experiences that were available outside of Hobart and Cradle Mountain. This earlier research directly informed the strategies aimed at building consumer knowledge and dispersion to different areas of the state.

In late 2010, the Motivations Research was commissioned to update and expand our insight into the perception of Tasmania's holiday experiences. The main interest was in understanding the appeal of a range of experiences and the motivational triggers that promote consideration and conversion to a Tasmanian holiday.

Researchers tested a range of Tasmanian holiday experiences within the following themes: Wilderness; History and Heritage; Coastal Nature; Wildlife Encounters; Food and Beverage; Outdoor Experiences; Luxury; Arts and Island Culture; and Events.

Specifically, the study sought to:

- « provide a deeper understanding and fill knowledge gaps regarding the particular holiday experiences and Tasmanian appeals that best meet the travel motivations of Tasmania's target markets
- « quantify the potential of each concept to trigger a demand response
- « inform Tourism Tasmania's marketing and communications strategies with detailed quantitative and qualitative insights into the most effective appeal areas, selling propositions and media messaging.

What is an experience?

"Experiences are memorable events or interactions that engage with people in a personal way and connect them with a place – in this case Tasmania, it's people and their way of life."

Tasmanian Experience Strategy

Research methodology

The research focused on Tasmania's key interstate markets of Victoria, New South Wales and Queensland. The research approach included a quantitative and qualitative phase. The findings from the quantitative study provided essential input into the qualitative research. Visual and written prompts were provided to respondents on the themed Tasmanian holiday experiences. These were used during the questioning to help provide greater depth of discussion.

Quantitative methodology

An online survey was conducted with two groups of travellers. One group consisted of 628 respondents who expressed an interest in travelling to Tasmania in the next two years and a second group of 252 respondents who expressed no interest in travelling to Tasmania in that timeframe.

A total of 880 respondents were surveyed in all. Respondents were spread across all the life stage groups and recruited against the following criteria:

- « travelled overseas or interstate in the last 12 months and
- « spent more than \$2,000 or \$200 per night on their last holiday and
- « currently reside in either Victoria, New South Wales or Queensland.

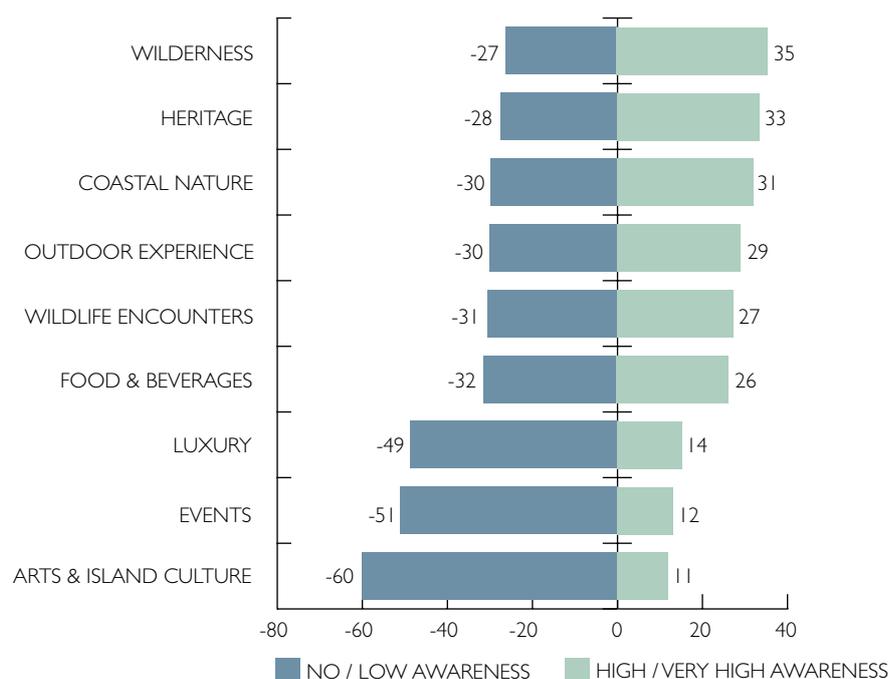
Qualitative methodology

Eight focus groups were conducted in Brisbane, Sydney and Melbourne in order to provide an interpretation of the motivational factors and the quantitative findings. Researchers selected participants using the same criteria as the quantitative research phase with all expressing an interest in travelling to Tasmania in the next two years. Researchers also recruited participants according to whether they were in the 'older affluent' or 'younger' life stages. The same set of themed experiences used in the survey guided the discussions.

Initial awareness of experience

% who saw the experience

Derived from the BDA Tas Motivations Survey



INSIGHT

Respondents from key markets have a low level of awareness of the holiday experiences available in Tasmania.

Findings

Awareness of Tasmania's holiday experiences

Awareness, a measure of the level of current knowledge of Tasmanian holiday experiences tested, was generally low.

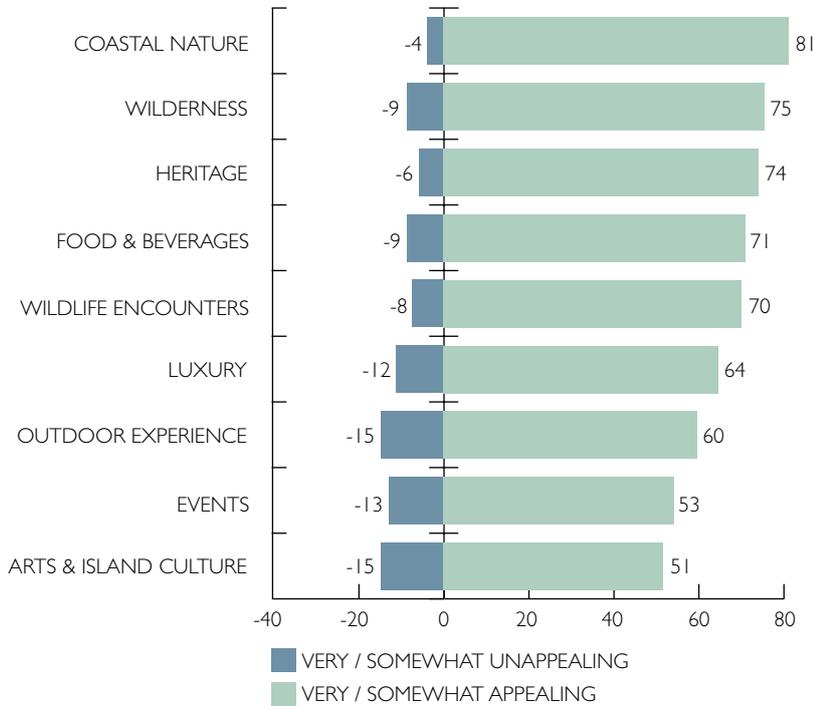
Appeal of experience themes

Appeal, a measure of attraction and interest in Tasmanian holiday experiences, was generally very high. When ranked in order of most appealing, Coastal Nature, Heritage, and Wilderness, were consistently ranked highest across each respondent segment.

Appeal of Experience

% who saw the experience

Derived from the BDA Tas Motivations Survey



COASTAL NATURE

"It's getting back to the elements"

"It's pristine, you're the only one there"

HERITAGE

"I like learning and history is learning"

WILDERNESS

"the excitement of discovering new places"

"I just like to get lost with my camera"

INSIGHT

There is a low awareness of Tasmanian experiences across all holiday theme areas. The experiences tested were shown to be highly appealing.

The research revealed that, when asked to identify "a unique experience to Tasmania" based on their prior knowledge and the holiday themes shown, respondents identified Wilderness (52%) followed by Heritage (48%) and Wildlife encounters (42%) as the most uniquely Tasmanian experiences. Coastal Nature, which had the highest level of appeal, was considered less unique (33%) to Tasmania as it was available in other parts of Australia.

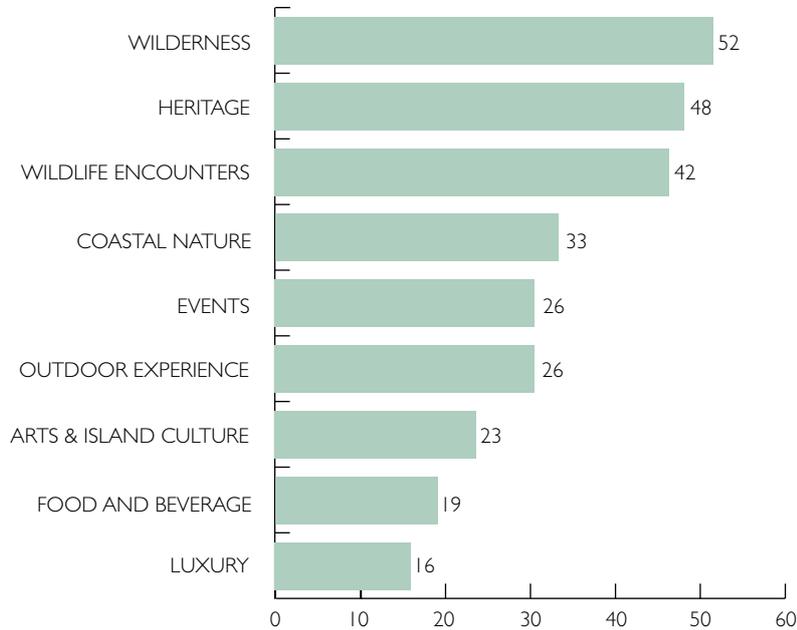
INSIGHT

Experiences linked to Wilderness, Heritage, and Wildlife Encounters are considered unique to Tasmania.

Would you say that the experience is “A unique experience available only in Tasmania”

% agree with statement

Derived from the BDA Tas Motivations Survey



HERITAGE

“It has got heritage the rest of Australia doesn’t have”

WILDLIFE ENCOUNTERS

“Absolutely love wildlife, and never realised all of this is in Tassie”

UNIQUE WILDERNESS

“This is why you go Tasmania”
“A pristine landscape – clean and fresh”

To gauge the effect of building awareness of Tasmanian holiday experiences as a motivational trigger to holiday in Tasmania, respondents were first asked how likely they were to take a holiday in Tasmania in the next two years. Respondents were then shown the holiday themes. The results showed that, once awareness of Tasmania holiday experiences was increased, the intention to visit Tasmania increased by 34%. At a state level, increases ranged from 25% in Victoria, 26% in New South Wales and 48% in Queensland.

Likelihood of taking a holiday in Tasmania in the next 2 years

‘Very Likely’ to ‘Certain’ (%)

Derived from the BDA Tas Motivations Survey



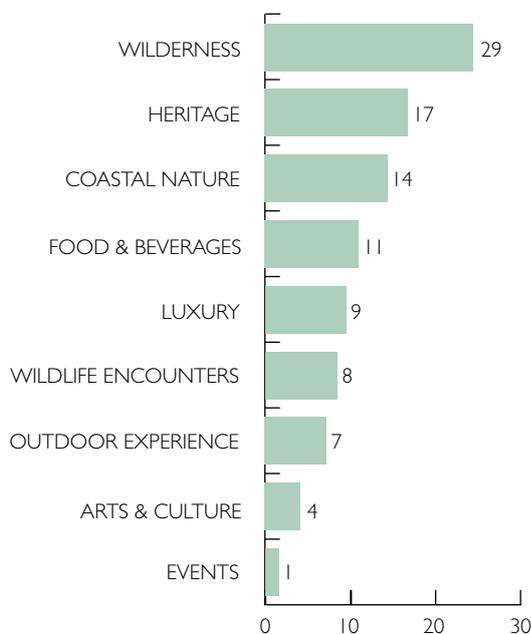
INSIGHT

Raising the awareness of Tasmanian travel experiences has the potential to increase the intention to visit by 34%.

Trigger for shift

#ranked experience by those that weren't initially planning Tas holiday but decided to post-stimulus

Derived from the BDA Tas Motivations Survey



The greatest trigger to influence intention to visit Tasmania was Wilderness at 29%, with Heritage at 17% and Coastal Nature at 14%. Importantly, the greatest growth in intention to visit was from consumers who had not previously visited Tasmania. This reinforces the importance of raising awareness of Tasmania's holiday experiences as a key factor in growing visitation. The objective of this research was to test, in a broad market, the appeal of a range of experiences and the motivational triggers that promote consideration and conversion to visit Tasmania. It is clear that all experiences tested have the potential to shift intention to visit. Lower ranked experiences still shift intention but to a smaller proportion of the respondents.

INSIGHT

Building awareness of Tasmania's Wilderness and Heritage experiences has the highest potential to shift intention to take a holiday in the state.

The qualitative research findings confirm that Tasmania's natural assets, that is, Wilderness and Coastal Experiences, have the strongest emotional associations, the strongest appeal and are the most potent motivators to shift travel intention to Tasmania. Tasmania's wilderness is a key point of difference and represents to many potential visitors "peace and solitude to explore iconic pristine Tasmania".

Heritage is also compelling and unique as it offers a physical connection with Australia's past – "history that you can touch".

Preferred duration of visit

The research revealed that while some consumers were considering shorter trips - a week-end or a few days in one place - the overwhelming majority (76%) would prefer to tour the state, travelling between one to three weeks.

Seasonality

The largest proportion of consumers (44%) indicated they would most likely visit during summer, with spring (32%) and autumn (24%) being the next most popular seasons. Winter was the least preferred season to visit Tasmania (8%).

Summary

The research indicates that increasing awareness of themed experiences developed from Tasmania's core appeals can increase consideration and intention to visit. Viewing Tasmanian holiday experiences created a 34% lift in intention to visit.

Tasmania's natural assets are intrinsic to the Tasmanian brand. Wilderness and Coastal Nature experiences were highly appealing and the most likely to motivate a shift in travel consideration and intention to holiday in Tasmania.

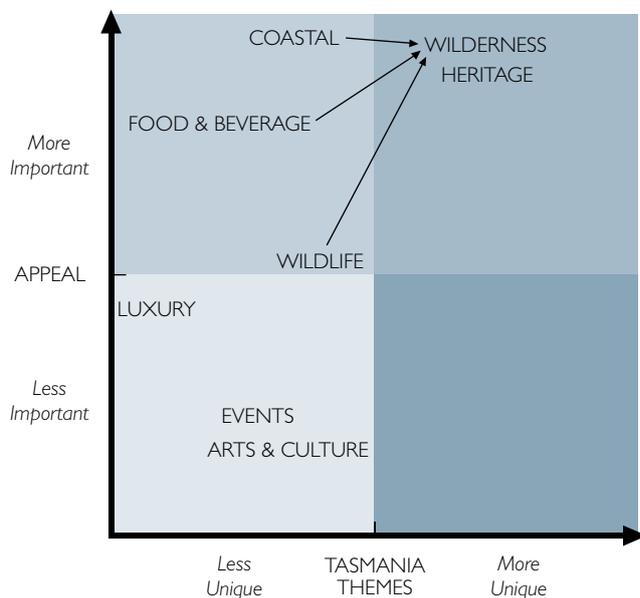
Second only to Wilderness, Heritage experiences are also highly appealing and powerful triggers in increasing intention to visit. Tasmania's history and heritage are considered unique and the state is recognised as offering a physical connection with Australia's past. Outside of Tasmania's natural assets, historic heritage is a key point of difference.

Strategically, these core appeals should be reinforced, strengthened and used in communication to consumers to create destination differentiation.

Though less powerful in triggering an increase in intention to visit, Food and Beverage, Luxury, and Wildlife Encounters can nevertheless be leveraged by associating them with the top ranked experiences.

Outdoor Experiences, Arts and Culture, and Events have the least amount of broad appeal as motivational triggers capable of increasing intention to visit. These experiences attract a smaller but important special interest market. However, for the broad market, these experiences are not primary drivers to travel though they are still vital as activities and experiences while at a destination. These experiences should be associated with the more appealing themes, where possible, when there are clear contextual links.

BDA Positioning Grid



When an experience has high appeal and high uniqueness to Tasmania, like Wilderness and Heritage, there is strong and differentiated positioning that Tasmania can use to build visitation.

Further information

For further information on the Motivations Research, visit the Tourism Tasmania website at www.tourismtasmania.com.au/research

Tourism Tasmania is committed to the broader industry use of this research and welcomes enquiries from industry groups interested in gaining further insights from the research results.

Please contact Vic Dobos, Head of Business Intelligence, Tourism Tasmania on victor.dobos@tourism.tas.com.au

An exceptional Tasmanian visitor experience is the sum of many factors. In addition to Tasmania's core appeals, visitor experience is created through knowledgeable, engaging and professional staff, quality accommodation, distinctly Tasmanian activities and superior supporting services. When successfully combined, the result is an authentic and memorable Tasmanian experience for which visitors are likely to return, and recommend to others.