EXECUTIVE SUMMARY

Tourism Research Australia and Tourism Tasmania contracted Orima Research to conduct a study to explore perceptions of Tasmania as a holiday destination, and satisfaction levels among recent visitors. The research was conducted in October, November and December of 2013.

This report summarises the key findings from the research, and explores:

- key perceptions of Tasmania
- core appeals driving visitation to Tasmania (at an overall and regional level)
- visitor satisfaction with holiday experiences, and willingness to visit Tasmania in the future.

METHODOLOGY

The research was qualitative in nature, with 10 focus groups and 15 in-depth telephone interviews. A total of 93 people who had visited Tasmania in the last three years participated in the research, which was conducted in Melbourne, Sydney, and Brisbane.

The focus group discussions explored a range of issues, including:

- What made visitors consider Tasmania as a holiday destination?
- How did they plan and book the trip?
- How did they decide on which destinations and attractions to visit as part of their itinerary?
- How satisfied were they with their trip, at an overall level and with the specific regions they visited?

The in-depth interviews explored these issues further, with a particular focus on the use of information sources and booking channels both before and during visitors’ trips to Tasmania.
OVERALL PERCEPTIONS OF TASMANIA

Most participants had positive perceptions of Tasmania and indicated they would be likely to recommend Tasmania as a holiday destination to others they knew. Most participants reported they would visit again in the future.

Participants identified a number of ‘core appeals’ (i.e. key appealing aspects) of Tasmania, including:

- wilderness and nature
- food, wine and produce
- heritage and history
- pristine and untouched scenery
- wildlife
- arts and culture.

Only a few participants had negative perceptions of Tasmania, and these were largely related to the price of accommodation (relative to other destinations in Australia) and a perception that Tasmania was ‘quiet’ with ‘not much happening’.

A number of factors that successfully converted participant consideration into intention and holiday visitation were identified, including:

- knowledge of how to access and experience Tasmania’s ‘core appeals’
- positive past experiences—most participants had visited Tasmania more than once and positive past experiences acted as the key driver for their subsequent visits.
- availability and accessibility of specific attractions, festivals, events or experiences
- availability of cheap airfares.

TRIP PLANNING AND BOOKING

Many participants planned and booked accommodation prior to travelling. This was particularly the case for participants:

- on shorter visits (i.e. five nights or less)
- travelling in a group
- travelling during peak periods.

Other participants booked their accommodation and organised their itineraries when they arrived. Their decisions were based on length of stay and awareness of—and preference for—specific attractions or locations.

Most participants were satisfied with the information sources and channels available to them at the initial planning stage. However, many participants reported that there was a limited amount of detailed information available relating to:

- how to access and experience Tasmania’s ‘core appeals’ (i.e. wilderness/nature, food/wine, history/heritage)
- how Tasmania was ‘pieced together’ and the distinctive characteristics of each region
- an understanding of why (i.e. what a region could offer) and when (i.e. the climate) they should visit each region
- suggested itineraries based on length of stay (i.e. two days through to four weeks) and entry and exit ports (i.e. Devonport, Launceston and Hobart).

Participants were also generally satisfied with the sources and channels through which information was available once in Tasmania. However, participants identified some information gaps, including for:

- regional attractions and destinations
- planning their broader Tasmanian itinerary.

Notably, participants indicated limited use of social media, both prior to arrival and once in Tasmania.
ENCOURAGING REGIONAL DISPERSAL

Most participants reported they thought of Tasmania as a whole—not as individual regions with their own attractions. This was particularly so on their first visit. However, once exposed to information about the regions, many participants perceived each of the five regions in Tasmania (i.e. North, South, East Coast, North West and West) to have unique characteristics and visitor experiences.

Many participants planned their visit to Tasmania around using a metropolitan hub (i.e. Launceston or Hobart), and noted the following barriers to staying in regional locations:

- limited time in Tasmania (i.e. five days or less)
- limited understanding and awareness of the distance and travel time between locations
- a desire to be settled in one location and to not ‘travel around’, particularly when travelling with children or in a larger group
- a lack of awareness of accommodation options, attractions, activities and events on offer.

Generally, participants who stayed in locations outside of the metropolitan centres were:

- visiting Tasmania for a longer period of time (i.e. on a touring holiday)
- more knowledgeable about different places to stay (through previous visits to the regions or word-of-mouth)
- aware of appropriate accommodation options.
THE SOUTH REGION

Participants perceived the South to:

- be ‘easy to get around’
- have ‘lots to do and see’
- have ‘diverse’ attractions
- have a ‘good range’ of accommodation.

Additionally, many participants in Melbourne and some in Sydney perceived the South to be an accessible destination that could be visited over a weekend or short stay.

The South region was seen as offering many of Tasmania’s ‘core appeals’ in one location, including:

- history/heritage (e.g. Port Arthur)
- food, produce and wine
- scenery and wilderness (e.g. Tasman Peninsula, Lake St Clair and Bruny Island)
- nature-based experiences (e.g. Mount Wellington, South Coast Track and Tasman Peninsula)
- island culture (e.g. Salamanca Markets)
- the arts (e.g. The Museum of Old and New Art, or ‘MONA’).

In addition, participants reported that they had visited the South due to:

- the availability of direct and/or cheap flights to Hobart
- positive regional perceptions through word-of-mouth
- the accessibility of attractions and ease of travel within the region
- the range of accommodation available—this was particularly a factor for participants seeking luxury accommodation, or those travelling in larger groups.

‘The South feels like it has everything, I could spend two weeks there’—visitor from Melbourne

‘I just preferred Launceston…it was more relaxed…like a big country town…Hobart is becoming more like Sydney’—visitor from Sydney
THE NORTH REGION

Perceptions of the North identified in the research included:

- ‘spectacular scenery’
- ‘lush’ and ‘English looking’ countryside and buildings
- ‘fresh’ local produce and wine.

The North was seen as being suited to a range of visitors, from couples seeking a romantic getaway to families and adventure seekers. The North was also felt to be a weekend destination for some participants from Melbourne and Sydney, due to its accessibility.

The key motivators for participants travelling to and within the North were Cradle Mountain and Launceston. However, there was limited awareness among participants of other Northern attractions including the Tamar Valley, the Barnbougle golf courses (The Dunes and Lost Farm) and Ben Lomond National Park.

Other factors that had motivated—or would motivate—participants to travel to the North included:

- the availability of direct and/or cheap flights to Launceston
- positive regional perceptions and advocacy through word-of-mouth
- the accessibility of attractions and ease of travel within the region
- the broad range of accommodation options available.

‘I like the parks and the old school English look’— visitor from Brisbane

‘We couldn’t get information about local produce at the Launceston tourist centre…I think a list of farmers markets…a map of wineries would be good’—visitor from Brisbane
THE EAST COAST REGION

Many participants had visited the East Coast, and most of those who had not yet been indicated they were likely to visit in the future.

The research found that there was strong awareness of—and appeal for—many of the key attractions along the East Coast, including Wine Glass Bay and Bay of Fires. Many participants noted the region’s coastal scenery, pristine beaches and beach holiday atmosphere and felt it was a good location for a relaxing holiday. These attractions had motivated many participants to visit the region, and others to consider visiting.

The research also identified strong appeal for Maria Island, although awareness of this attraction was limited.

Other factors that had motivated participants to visit the East Coast included:

- the ease of accessibility from entry ports—participants reported it was a ‘quick’ and ‘easy drive’ from both Hobart and Launceston
- good driving roads within the region that made it easy to travel to the different attractions
- a perception that the weather was better along the East Coast, particularly in the warmer months
- the range of accommodation available—a few participants who had been seeking luxury accommodation stayed in this region due to the ‘higher end’ hotels and lodges available (e.g. Saffire Freycinet).

‘The coastline is spectacular’—visitor from Brisbane

‘In Bicheno it was 5pm and the cafes were shut…we couldn’t get a drink’—visitor from Sydney
THE NORTH WEST REGION

Only some participants had visited the North West. Most of these participants perceived the region to be ‘peaceful’ and ‘isolated’ with ‘rolling hills’ and an abundance of local produce.

Participants who had not visited the North West had limited awareness of its attractions and regional characteristics. These participants generally perceived that there was ‘not much to do’ and no ‘major attractions’ in the region. As a result, some visitors who had arrived in Devonport via the *Spirit of Tasmania* had driven to better known locations (e.g. Launceston or Cradle Mountain). Some participants also reported that there was limited information on the region which had made it difficult for them to book and plan their trip.

Both the Tarkine wilderness region and the township of Stanley (home to ‘the Nut’) were likely to attract visitors to the region, but awareness of these attractions was limited. In addition to these key attractions, participants reported that they had been, or were likely to be, motivated to visit the region due to the:

- proximity to Devonport, particularly for those arriving via the *Spirit of Tasmania*
- chance to visit a region they had not previously explored
- isolated nature of the region, and the fact that it was ‘quiet’ and off the main tourist trail.

“It has rolling green hills…it has a wholesome feel and the food there is wonderful”—visitor from Melbourne

“There’s no attractions…nothing really to see”—visitor from Brisbane
THE WEST REGION

All participants held similar perceptions of the region, reporting that it was ‘wild’, ‘remote’ and known for its ‘untouched’ wilderness. Most participants also felt that the West was better suited to ‘intrepid’ travellers who didn’t mind ‘roughing it’.

Only some participants had visited the West, and felt it was better suited for inclusion in a longer, touring holiday in Tasmania. Visitors appreciated the ‘quiet’ and ‘secluded’ nature of the coastline and the pristine landscape of the region.

Attractions in the region, including Strahan, Macquarie Harbour and the Gordon River would motivate some participants to travel to the West. However, there was limited awareness of these attractions among many participants.

In addition to the attractions, participants reported that they had visited, or were likely to visit the region as it was:

- felt to be ‘very different’ to the rest of Tasmania
- a region they had not previously visited
- ‘quiet’ and off the main tourist trail, offering an ‘authentic’ Tasmanian experience.

‘The total isolation is attractive… being on the beach with only your footprints’—visitor from Brisbane

‘It was too far from where we were based and we couldn’t find anywhere to stay there’—visitor from Brisbane
BARRIERS TO REGIONAL DISPERSAL

The selection of Launceston over Hobart as an entry port to Tasmania was identified as a barrier to travelling to the South and North regions. This was due to:

- preference for Launceston—some participants felt it was ‘more authentic’ and ‘quieter’ than Hobart
- cheaper and/or better-timed flights
- a desire to visit attractions closer to Launceston (i.e. Cradle Mountain).

Barriers identified across other regions included:

- time—despite the East Coast’s accessibility from the metropolitan hubs, some participants on weekend visits or shorter stays reported that time was a limiting factor
- poor weather/seasonality—as the East Coast was perceived to be a beach destination, some participants had opted not to go there in cooler months or when the weather was bad
- supply/availability of accommodation—a few participants reported that they had been unable to secure accommodation during busier periods. A few other participants felt that there was a lack of mid-range accommodation options available
- limited availability of information and advertising—this meant that many participants were unsure of where to stay, how to get around and/or how best to experience the region
- accessibility—participants reported that as there was only ‘one road into’ the North West was difficult to include the region as part of a shorter driving/touring itinerary
- distance from the main airports—participants perceived the region to be a ‘long way’ to travel from Hobart and Launceston
- isolation—a few participants, particularly women travelling on their own, felt it might be unsafe to travel alone in the region.
RECOMMENDATIONS

At an overall level, the research identified a need to increase visitor knowledge and encourage visitation between and within the different regions, with a focus on:

- increasing awareness of the regions, and the distinctive characteristics of each region, to make it easier for travellers to plan their visits
- focusing marketing materials on the whole of Tasmania as an aggregate of the regions—while participants wanted information on the different regions and what was available, they also required information on the state in its entirety to inform their holiday planning.

In terms of information needs prior to travel, visitors would benefit from further information on:

- how to access and experience Tasmania’s ‘core appeals’ (i.e. wilderness/nature, food/wine, history/heritage)
- why (i.e. what a region could offer) and when (i.e. the climate) they should visit each region
- suggested itineraries based on length of stay (i.e. two days through to four weeks) and entry and exit ports (i.e. Devonport, Launceston and Hobart) that show:
  - what to see and do depending on particular areas of interest (i.e. food/wine, wilderness/nature, hiking/adventure activities, attractions suited to children, history/heritage, arts/culture)
  - suggested timeframes for particular attractions/locations/towns
  - distances and travel times
  - different accommodation options across Tasmania, including places to stay outside the metropolitan hubs.

In relation to information needs while in Tasmania, visitors would benefit from more:

- up-to-date information on attractions and experiences, including:
  - opening hours
  - costs
  - booking requirements
  - time necessary to see/experience attraction
  - transport options
  - accommodation and eating options around/near and on the way to attractions
- state-wide information to help plan routes and itineraries in advance—participants reported that information was often localised, and that broader information about Tasmania and the tourist experiences in different regions should be available at all visitor information centres
- information on the North West and West regions.