

Brand Health Survey 2017

A summary report of a survey conducted by Brand Tasmania in December 2017 to February 2018

Executive Summary

Brand Tasmania's third annual Brand Health Survey confirms that the State's brand remains in good shape.

Brand Tasmania received 1,654 responses (up from 1,528 last year and 731 the previous year) from people in every Australian State and Territory and from 33 other countries.

The results were overwhelmingly positive:

- Perceptions of Tasmania rated an average of 8.4 out of 10 (slightly less than 8.5 recorded in 2016 and returning to 8.4 in 2015);
- 74 per cent of respondents believed Tasmania's reputation was improving (compared with 80 per cent in 2016 and 85 per cent in 2015);
- Respondents rated their confidence in the State's future at 7.8 out of 10 (improving from 7.6 in 2016 and closer to 7.9 in 2015);
- The words used most often to describe Tasmania were the same three listed in 2016: *Beautiful*; *Clean*; and *Natural* (*Clean*; *Beautiful*; and *Natural* in 2015).

Three groups were targeted by the survey team:

- Brand Tasmania eFriends who are subscribers to the monthly *Tasmania's Stories* electronic newsletter (>11,000);
- Brand Tasmania Partners and other contacts, including media workers and other influencers (>1,400); and
- The Public.

There were minor variations in surveys sent to each of the groups.

Those in the Public group were contacted through Brand Tasmania social media channels and were boosted through targeted paid advertising, local print media and online advertising.

Examining the breakdown of respondents from Australian states, this year saw an increase in respondents from outside of Tasmania. The percentage of respondents from Tasmania in 2017 - 18 was 20 per cent, compared with 24 per cent in 2016 and 47 per cent in 2015.

Over 880 respondents included optional comments to the survey questions, offering insights into the way Tasmania is perceived.

Survey Results

Overall the responses to the Tasmanian Brand Health Survey were positive, with the perception of the State being rated at an average of 8.4 out of 10. Those who had spent time in Tasmania as residents or tourists commented favourably about its liveability.

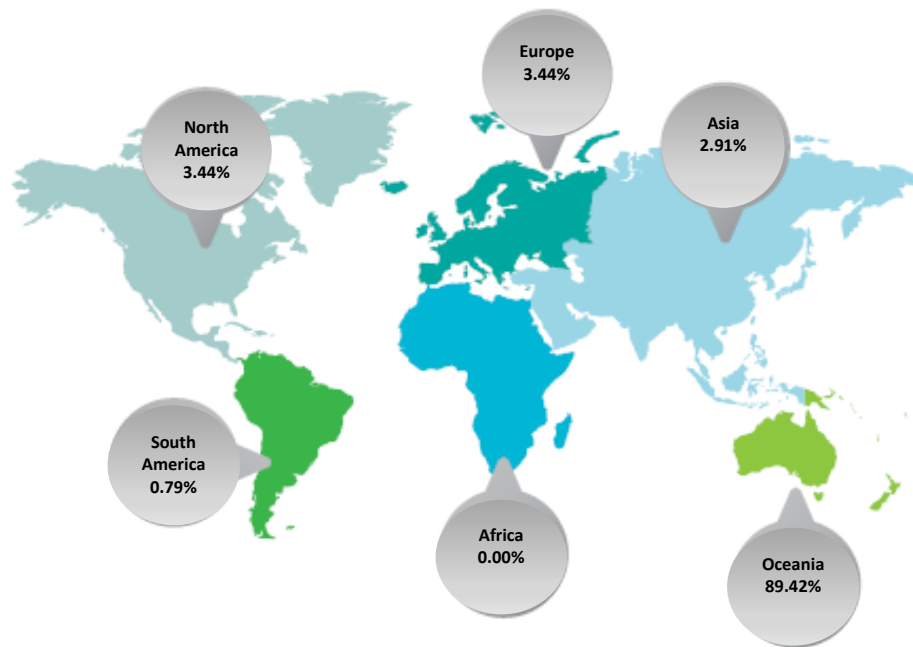
Descriptors of Tasmania submitted by the respondents reaffirm the narrative that has been used in association with the State's master brand in recent years. In a total of 4,186 words or phrases submitted there were more than 726 unique descriptors. Again, this year the results presented no surprises. The top three words were Beautiful, Clean, and Natural, selected in the same order as last year.

Several overarching themes were evident, led by Visitation, Liveability, Produce (food and beverage), Environment, Migration, Government and Landscape.

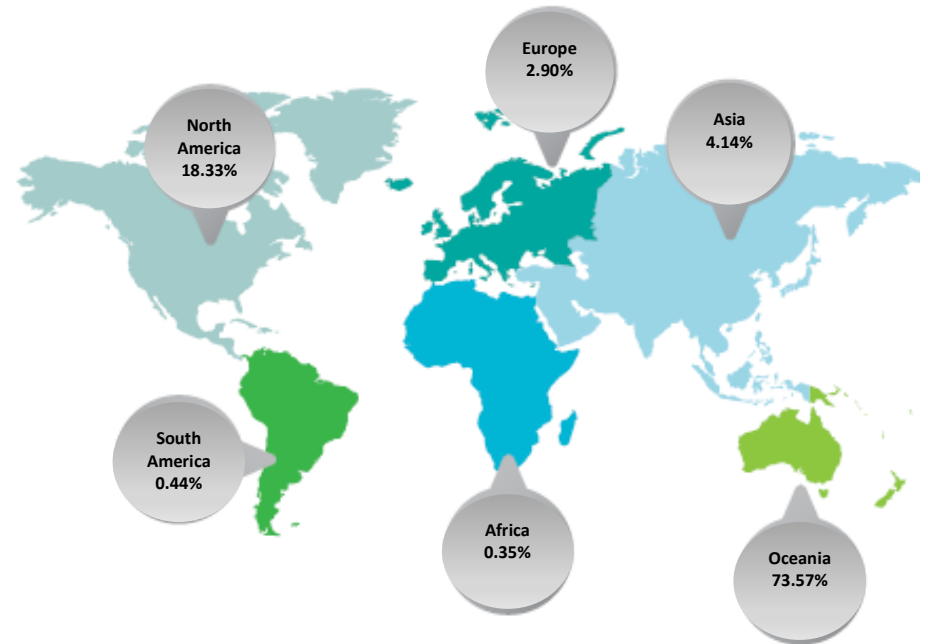
The following is a summary of the combined results of the survey for all three groups.

Note that not all respondents answered all questions and some results shown as percentages will not total 100 per cent due to data-entry errors by some respondents.

Entries by region for eFriends respondents



Entries by region for Public respondents



Perception

The respondents rated their perception of Tasmania an average of 8.4 out of 10 (2016 – 8.5, 2015 – 8.4)

Reputation

Do you feel Tasmania's reputation is?

| Reputation | eFriends | Public | Partners Media Influencers | Average |
|------------------|----------|--------|----------------------------------|---------|
| Improving | | | | |
| 2015 | 82% | 85% | 91% | 86% |
| 2016 | 84% | 78% | 78% | 80% |
| 2017 | 85% | 62% | 76% | 74% |
| Static | | | | |
| 2015 | 16% | 12% | 7% | 12% |
| 2016 | 13% | 20% | 16% | 16% |
| 2017 | 12% | 30% | 13% | 18% |
| Declining | | | | |
| 2015 | 1% | 2% | 2% | 2% |
| 2016 | 3% | 2% | 6% | 4% |
| 2017 | 3% | 4% | 4% | 4% |

Confidence

(Question was asked of Partners/media/influencers only)

The respondents rated their confidence in Tasmania's future at an average of 7.8 out of 10 (2016 – 7.6, 2015 – 7.9).

Purchase behaviour

Do you prefer to purchase Tasmanian produce when available?

| Purchase propensity | eFriends | Partners Media Influencers | Public | Average |
|---------------------|------------|----------------------------------|------------|------------|
| Yes | | | | |
| 2015 | 90% | 98% | 93% | 94% |
| 2016 | 93% | 97% | 87% | 92% |
| 2017 | 94% | 97% | 84% | 91% |
| No | | | | |
| 2015 | 10% | 2% | 7% | 6% |
| 2016 | 7% | 3% | 13% | 8% |
| 2017 | 6% | 3% | 16% | 9% |

How often do you purchase Tasmanian produce?

| Purchase frequency | eFriends | Media Partners Influencers | Public | Average |
|--------------------|------------|----------------------------|------------|------------|
| Weekly | | | | |
| 2015 | 47% | 81% | 50% | 59% |
| 2016 | 44% | 85% | 33% | 54% |
| 2017 | 41% | 91% | 26% | 52% |
| Monthly | | | | |
| 2015 | 36% | 15% | 28% | 26% |
| 2016 | 34% | 9% | 38% | 27% |
| 2017 | 38% | 6% | 40% | 28% |
| Annually | | | | |
| 2015 | 11% | 3% | 13% | 9% |
| 2016 | 20% | 4% | 23% | 15% |
| 2017 | 20% | 1% | 20% | 14% |
| Once | | | | |
| 2015 | 1% | 0% | 5% | 2% |
| 2016 | 2% | 0% | 3% | 2% |
| 2017 | 2% | 1% | 6% | 3% |
| Never | | | | |
| 2015 | 0% | 1% | 2% | 1% |
| 2016 | 0% | 0% | 1% | 0% |
| 2017 | 0% | 2% | 0% | 1% |

What has most influenced your perception of Tasmania?

Question asked of eFriends and Public only

| Influence factor | 2017 Public | 2017 eFriends | 2017 Average % |
|---|-------------|---------------|----------------|
| Visited the state as a tourist | 54% | 47% | 51% |
| Purchased Tasmanian food | 32% | 45% | 39% |
| Purchased Tasmanian beverages | 27% | 40% | 34% |
| Purchased other Tasmanian made products | 22% | 28% | 25% |
| Now living in Tasmania | 8% | 35% | 22% |
| Have lived in Tasmania | 18% | 26% | 22% |
| Have viewed media reports | 43% | 16% | 30% |
| Purchased a service from Tasmania | 9% | 14% | 12% |
| Visited the state on business | 7% | 11% | 9% |
| Have studied in Tasmania | 5% | 8% | 7% |
| Moved to Tasmania in the past 12 months | 2% | 3% | 3% |

Place of residence

The table represents the top 15 countries where survey responses were received.

| Country | 2015 Total | 2015 % | 2016 Total | 2016 % | 2017 Total | 2017 % |
|----------------|------------|--------|------------|--------|------------|--------|
| Australia | 649 | 90% | 1204 | 90.1% | 1019 | 69.3% |
| Canada | 1 | 0% | 3 | 0.2% | 170 | 11.6% |
| New Zealand | 0 | 0% | 5 | 0.4% | 110 | 7.5% |
| USA | 9 | 1% | 19 | 1.4% | 28 | 1.9% |
| United Kingdom | 4 | 1% | 16 | 1.2% | 16 | 1.1% |
| Greece | 0 | 0% | 0 | 0.0% | 11 | 0.7% |
| India | 0 | 0% | 4 | 0.3% | 9 | 0.6% |
| Italy | 0 | 0% | 2 | 0.1% | 9 | 0.6% |
| Malaysia | 1 | 0% | 20 | 1.5% | 6 | 0.4% |
| UAE | 0 | 0% | 0 | 0.0% | 5 | 0.3% |
| South Korea | 0 | 0% | 0 | 0.0% | 4 | 0.3% |
| Germany | 4 | 1% | 6 | 0.4% | 3 | 0.2% |
| China | 31 | 4% | 3 | 0.2% | 3 | 0.2% |
| Spain | 0 | 0% | 0 | 0.0% | 3 | 0.2% |
| Philippines | 0 | 0% | 18 | 1.3% | 2 | 0.1% |

Australian respondent's place of residence

| State | 2015 Total | 2015 % | 2016 Total | 2016 % | 2017 Total | 2017 % |
|------------|------------|--------|------------|--------|------------|--------|
| Victoria | 143 | 22% | 185 | 16% | 207 | 22% |
| Tasmania | 303 | 47% | 269 | 24% | 186 | 20% |
| NSW | 112 | 17% | 170 | 15% | 178 | 19% |
| Queensland | 48 | 7% | 78 | 7% | 157 | 17% |
| WA | 17 | 3% | 171 | 15% | 80 | 8% |
| SA | 13 | 2% | 148 | 13% | 79 | 8% |
| ACT | 7 | 1% | 87 | 8% | 49 | 5% |
| NT | 2 | 0% | 36 | 3% | 13 | 1% |
| Totals | 645 | | 1144 | | 949 | |

Descriptors of Tasmania

The respondents were asked to list three words they felt best described Tasmania. More than 720 unique words or phrases were submitted.

The list represents the top 10 words mentioned in the 2017 survey responses.

The word "Wild" appeared in the list for the first time in 3 years, replacing "pristine" which slipped down the scale to 66 mentions in 2017, compared with 56 in 2015 and 84 in 2016.

Sentiment

Upon review of all comments (>880) the sentiment of each was rated and is summarised as follows:

| Sentiment | Average 2015 | Average 2016 | Average 2017 |
|-----------|--------------|--------------|--------------|
| Positive | 60% | 69% | 71% |
| Negative | 23% | 14% | 16% |
| Neutral | 17% | 17% | 13% |

Themes

Distinctive themes articulated in the comments were:

- Liveability – cost of living, infrastructure, traffic, weather, natural and built heritage, clean environment, climate, fresh air, clean water, cool climate, fresh produce, relaxed lifestyle, culture, trading hours, penalty rates
- Landscape – scenery, beaches, overall beauty
- Environment – forestry, environmental assets, natural assets, litter, water issues, flora and fauna
- Government – State and local government, all political parties, policy, priorities, relationship with large firms, investment, red tape, development in wilderness, politics
- Marketing – awareness, perceptions, reputation, drivers, advertising, place-of-origin, meaning of the brand
- Produce – food and beverage, wine, organic, GMO free, affordability, availability
- Visit – has or plans to visit, hospitality, visitor experience, service, TT Line, tourism investment and infrastructure
- Migration – has or desires to move to Tasmania or has moved from Tasmania

- AFL – Hawthorn home games in Launceston and North Melbourne home games in Hobart

- Employment – appropriate opportunities for children or themselves as a motivator for migration

- Arts – MONA, TMAG

- History

- Investment – freight capacity, foreign investment, private and government investment, government involvement

- Infrastructure – general infrastructure, tourism infrastructure (airport), architecture, roads, transport, air access in and out of the state

- Economic Growth – increase innovation, sustainability

- Mindset – small town mentality, less insular, proudness, outward looking, encourage diversity, accept the new

- Retail – opening hours, customer service,

- Education – investment

- Collaboration – holistic approach, consistency across sectors, collaboration with businesses.

- Services – health

Upon review each comment was categorised into a maximum of two themes. If more themes were mentioned, the first two or main themes from the comments were noted as the key themes.

The frequency of the most common themes is expressed as percentages:

| Drivers | 2015 | 2016 | 2017 |
|-----------------|-------------|-------------|-------------|
| Visit | 18.5% | 34.9% | 37.1% |
| Liveability | 17.6% | 15.1% | 11.7% |
| Produce | 10.1% | 10.9% | 7.7% |
| Environment | 4.7% | 3.7% | 7.2% |
| Migration | 7.9% | 7.2% | 7.0% |
| Government | 9.2% | 6.6% | 6.2% |
| Marketing | 19.4% | 8.9% | 5.1% |
| Landscape | 3.7% | 4.4% | 5.1% |
| Infrastructure | 0.0% | 1.2% | 2.8% |
| Employment | 1.0% | 1.1% | 2.8% |
| Services | 0.2% | 0.0% | 1.8% |
| Economic growth | 1.4% | 2.0% | 1.5% |
| History | 0.5% | 0.5% | 1.2% |
| Arts | 0.7% | 1.7% | 1.1% |
| Retail | 0.0% | 1.0% | 0.5% |
| Education | 0.5% | 0.0% | 0.5% |
| Collaboration | 0.0% | 0.0% | 0.3% |
| AFL | 1.7% | 0.5% | 0.2% |
| Investment | 2.8% | 0.1% | 0.2% |

Ideas to improve perception

The Partners group (including media and other influencers) was asked an additional question –

Name three things that would change your perception of Tasmania.

A total of 141 responded from the Partners group, of which 85% provided additional comments. This is testament to the heightened engagement and awareness this group has with Tasmania. Due to confidentiality reasons the verbatim comments have not been made public.

Themes

Again, each comment was categorised into a maximum of two themes.

The majority of suggestions focus on infrastructure, tourism development, customer service and government-related issues.

The following summarises how often the most common themes featured in comments.

| Drivers | 2015 | 2016 | 2017 |
|-----------------|-------------|-------------|-------------|
| Infrastructure | 6.3% | 10.5% | 20.7% |
| Government | 18.3% | 21.7% | 18.7% |
| Environment | 6.3% | 3.9% | 11.1% |
| Marketing | 12.6% | 11.2% | 10.6% |
| Retail | 2.1% | 0.7% | 6.6% |
| Education | 2.1% | 1.8% | 6.1% |
| Employment | 1.6% | 1.7% | 4.5% |
| Liveability | 5.2% | 8.1% | 4.0% |
| Visit | 18.3% | 15.4% | 4.0% |
| Economic growth | 4.2% | 3.5% | 3.0% |
| Investment | 4.2% | 4.0% | 3.0% |
| Mindset | 5.8% | 4.2% | 3.0% |
| Produce | 4.2% | 1.8% | 3.0% |
| Migration | 0.5% | 0.2% | 1.0% |
| Collaboration | 4.2% | 1.7% | 0.5% |
| Arts | 0.5% | 0.4% | 0.0% |
| Innovation | 1.0% | 0.9% | 0.0% |
| Services | 0.5% | 7.9% | 0.0% |
| Weather | 2.1% | 0.4% | 0.0% |

Methodology

The brand health survey was developed and administered using Wufoo, an online software tool that provides a cost effective mechanism for preparing the survey forms and collating the data and information received.

As with previous years, three slightly different versions of the survey were developed for the three different groups: eFriends, Partners and Public.

Brand Tasmania's eFriends database with >11,000 contacts has an extensive global reach built up over the past 10 years. The second listing was sent to around 1,720 contacts comprising Brand Tasmania Partners (>1100), influencers and media. The final group was designated Public – a mixture of people with varying degrees of knowledge and engagement with Tasmania.

Campaign Monitor was used to contact people on Brand Tasmania's various distribution lists inviting them to complete the survey. To encourage a greater response rate, survey respondents were offered the chance of winning a range of prizes. The distribution of the surveys commenced early December 2017.

A total of 2,107 eFriends opened the email sent via Campaign Monitor with 378 responding, representing a drop on previous years.

The Public group were invited to complete the survey via Brand Tasmania's social media channels (Facebook and Twitter), and by email through industry associations and key contacts. Advertising on Facebook was used extensively to solicit responses to the survey. This year, print advertising in the Tasmanian local newspapers was incorporated into the distribution methodology, as well as online advertising through *The Mercury*.

In the first week of February a total of 1,654 responses had been received and was deemed an acceptable sample size. It carries a potential margin of error of less than 2.45 per cent.

Over 880 comments were submitted by survey respondents and their responses provide valuable insights into the health of the brand and suggestions about risks. Due to confidentiality reasons the verbatim comments have not been made public.

Nearly 800 respondents in the Public group expressed a desire to subscribe to the monthly electronic newsletter *Tasmania's Stories*. This ensures on-going engagement with a majority of respondents from all three groups.

Glossary

- Response rate – total number of completed surveys divided by total number of email invites opened. Data provided by Campaign Monitor (www.campaignmonitor.com) and Wufoo (www.wufoo.com)
- Conversion rate – total number of completed surveys divided by total number of survey opens or page views. Data provided by WuFoo
- Margin of error – $1/\sqrt{N}$. www.sciencebuddies.org/sciencefair-projects/project_ideas/Soc_participants.shtml

The Brand Tasmania Council Inc

The independent Brand Tasmania Council Inc was established by Tasmanian exporters to formulate and promote place-of-origin branding for the State. The council's members include leaders of the private sector and representatives of relevant Government agencies.

Through the Executive Director, the council engages proactively with relevant Government business units and is responsive to a range of other key organisations involved in marketing Tasmania, including:

- Industry peak bodies;
- Local government councils;
- Other State government departments;
- Organisers of major events; and
- Significant businesses.

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