

# TOURISM TASMANIA CORPORATE PLAN 2023-2026



Wineglass Bay from  
Wineglass Bay Track Lookout,  
Freycinet National Park  
© Revolution MTB

**TASMANIA**  
COME DOWN FOR AIR



*We acknowledge the Tasmanian Aboriginal people  
and their enduring custodianship of lutruwita (Tasmania.)*

*We honour the uninterrupted care, protection and belonging  
to these islands, skies and waterways, before the invasion  
and colonisation of European settlement.*

*As part of a tourism industry that welcomes visitors to these lands,  
we acknowledge our responsibility to represent to our visitors  
Tasmania's deep and complex history, fully, respectfully and truthfully.*

*We acknowledge the Aboriginal people who  
continue to care for this country today.*

*We pay our respects to their Elders, past and present.*

*We honour their stories, songs, art, and culture, and their  
aspirations for the future of their people and these lands.*





# Contents

Acknowledgement	02	Destination program – leading visitor economy planning	16
Our purpose	04	Supporting quality tourism development and regional tourism services	17
Statement of corporate intent	04	Access	17
Our commitment	05	Engagement program	18
Executive summary	06	People program	19
Our unique destination	07	Organisation program	21
Emerging forces shaping travel globally	07	Performance Reporting	23
Our visitor economy	08	Risk management	24
2030 Visitor Economy Strategy	09	Risk register	25
Tasmanian Visitor Economy Governance	10	Program on a page	26
Tourism Tasmania’s strategic focus	11	Financial Statements	27
Marketing program	13		
Our customers:	15		
Our markets:	15		



# Our purpose

To connect travellers emotionally and culturally with our island, drive visitation and enhance visitor contributions; and lead a sustainable visitor economy that delivers social, environmental and economic value for all Tasmanians.

## Statement of corporate intent

The Tourism Tasmania Corporate Plan 2023 – 2026 outlines our role as a demand generator and brand leader in Tasmania’s visitor economy. It describes the agency’s role in generating demand for visitation as well as its role in leading and influencing the development of policy and planning for a future visitor economy. This collaboration provides our customers with a world leading experience and enables a sustainable visitor economy for the benefit of all Tasmanians.

We deliver our role through:

- Our brand platform and marketing program which celebrates the identifiable character and spirit that makes Tasmania a special place, creating cultural and emotional connections with customers and encourages travel to Tasmania.
- Leading, influencing and informing the T21 Visitor Economy Strategy planning and implementation on behalf of government and in partnership with industry to deliver on T21 goals.
- Advocating and securing air and sea capacity to support more opportunities for our visitors and the community to travel in and out of Tasmania.



## Our commitment

The tourism industry makes an important contribution to the state and to Tasmanians. It represents and celebrates the best of Tasmania and our way of life as well as supporting communities and jobs around the state.

We understand that with this comes a deep responsibility to honour and maintain what's special about this place and its people.

As a destination marketing organisation that connects with visitors through storytelling, we acknowledge our role and the opportunity we have to connect visitors with Tasmania's environment, people and culture and our deep and complex history.

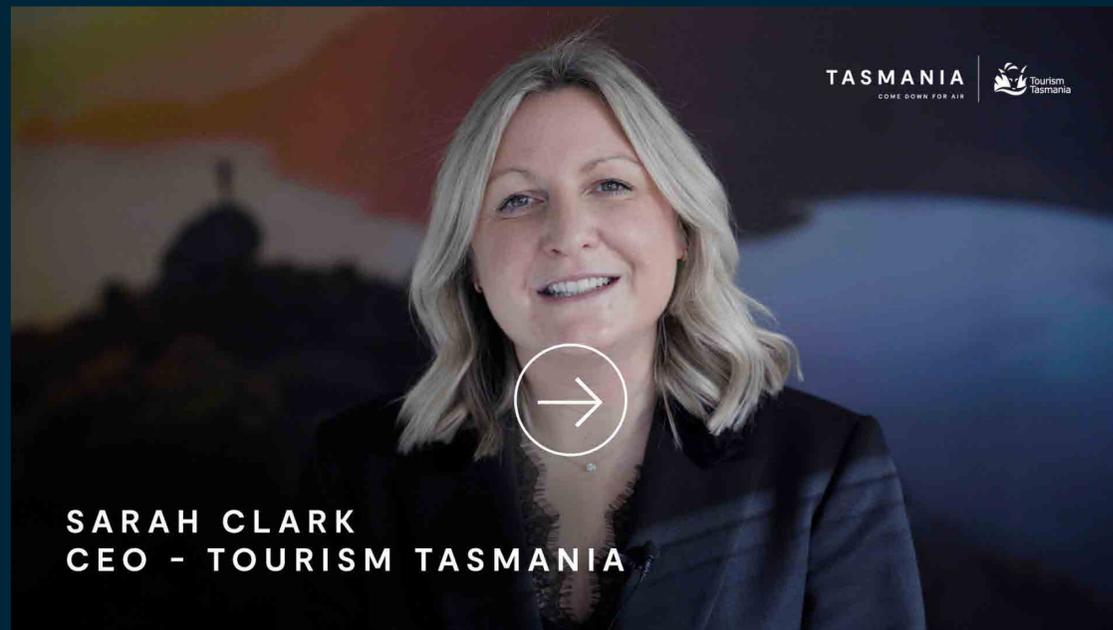
We want all visitors to feel welcome and are committed to working closely with both industry and our diverse communities to understand, package and communicate accessible and inclusive visitor experiences.

Tourism Tasmania's board, executive and team have made a commitment to ongoing and meaningful engagement with the Tasmanian Aboriginal community to ensure our role as a marketing organisation supports their aspirations for involvement in the sector.

As an organisation, we are committed to growing our knowledge and understanding of Tasmanian Aboriginal history and culture through respectful engagement and action within our program. This commitment is ongoing, and we will work closely with Tasmanian Aboriginal people to ensure we continue to respectfully sustain this commitment through our work.



# Executive summary



**SARAH CLARK**  
**CEO - TOURISM TASMANIA**

[i](#) [DOWNLOAD PDF IN ADOBE TO WATCH VIDEO](#)

As a small island state, a strong visitor economy is vital to strengthening air and sea access, supporting thousands of jobs and providing economic diversity and vibrancy to Tasmania’s regional economies.

Tourism is one of Tasmania’s success stories, it celebrates everything that is special about our place and provides travellers with the rich and authentic visitor experiences that they are increasingly seeking.

As the lead tourism agency, Tourism Tasmania plays an important role in the visitor economy by leading the state’s tourism brand, driving access strategy, connecting with our customers, generating demand and using our visitor economy knowledge, insights and data to provide visitor economy leadership and strong destination management expertise for the state.

The development of the 2030 Visitor Economy Strategy, in partnership with industry through T21, sets a clear and strong long-term vision to promote and protect Tasmania’s future with a visitor economy that contributes positively to our environment, prosperity and way of life.

This corporate plan outlines the agency’s key program areas, strategic focus and objectives to achieve its purpose and support the delivery of key directions within the 2030 strategy.

The volatility and impact of COVID-19 on the tourism sector is starting to stabilise, however economic constraints domestically and challenges emerging globally are continuing to disrupt consumers and the travel market and are important considerations for the industry and the agency.

Tourism Tasmania’s data strategy and visitor economy research program enables us to monitor and assess changing markets and the consumer environment. An important future focus is to package and share this information with industry and stakeholders more effectively to enable data and insights to inform better decision making and strengthen business sustainability.

Similarly, a priority focus of the agency is improving the overall effectiveness of our program. This is enabled through ongoing performance measurement including assessment of market performance, return

on marketing program investment, people benchmarks, resource utilisation, process and workflow improvements, and streamlining internal systems to increase efficiency.

The agency's digital transformation program is focused on ensuring digital marketing assets and enterprise systems are effective, fit for purpose and enable more personalised and direct communication with consumers to reduce reliance on traditional marketing activity.

International visitation is vital to ensure a balanced visitor profile with investment in key markets enabling the agency to continue to attract high yielding international visitors and restore that market segment back to 15 per cent of Tasmania's total visitors. The appointment of a new global PR agency is key to this approach and will drive an earned media and communications strategy both domestically and internationally to raise the profile of Tasmania in top tier media and extend the reach to those audiences.

Tourism Tasmania works closely with organisations within the visitor economy network including with industry bodies and the four regional tourism organisations to help manage our destination and contribute to our destination marketing activity. It is important that all stakeholders

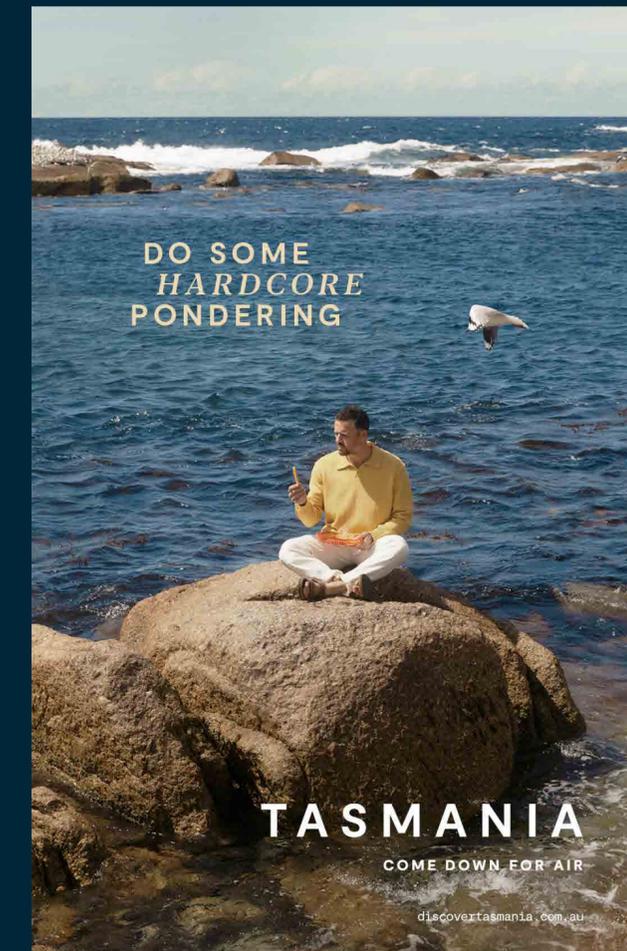
are aligned to our 2030 Visitor Economy Strategy and a key focus will be to improve connectivity and efficiency across the network, optimise contributions and look for opportunities to reduce or share costs.

The recovery of Tasmania's visitor economy post COVID has seen record visitor expenditure in 2022-23 largely driven by domestic holiday visitors. However, with international travel more accessible for domestic markets and growing economic headwinds, a market correction is expected with visitor expenditure not expected to continue at the same growth rate.

Tasmania's tourism industry is more than just numbers, it's about showcasing the best of our state to the world, supporting our communities and building a sustainable future.

By working together, we can continue to celebrate and maintain what makes Tasmania a special destination and ensuring visitors continue to enjoy their experience and contribute positively to our state.

Sarah Clark  
Chief Executive Officer  
June 2023





## Our unique destination

The things that make Tasmania such a special place to live are the very same things that make the state a compelling brand proposition to visitors.

- Nature and wildlife like nowhere else
- Casual, down to earth people who have time for you
- A place that lets you feel off-grid, without being remote
- Self-sufficient in renewable energy and net-zero
- A pace of life that gives you time to let everything seep in
- Small islands with a long history
- A community vibe that awakens your convivial side
- A winter that wakes you up
- World-class produce where you can still talk to the owner
- An off-beat quality that is definitely not mainland
- A thriving arts and culture scene to inspire you

In a world that is increasingly busy and stressed, there's a place for those who want to slow down, to reconnect with what matters, and to feel human again.

We invite them to Tasmania, to experience our place and our culture – to live like one of us for a weekend, a week, or a month.

Some of our tourism operators grew up here. Others were called to this place and its culture by their own visits. All of them deliver a Tasmanian experience that will help our guests feel more human. This is a decision we make every day, in a place where good enough is never good enough.

It is a privilege and responsibility to care for Tasmania, and to give visitors a meaningful opportunity to connect with and make a positive contribution to this place.

We work harder, we follow our obsessions, we support one another, and we protect what makes this place different.

Our Tasmanian-ness is at the heart of the principles that will guide our future visitor economy.



## Emerging forces shaping travel globally

There are global forces of change that are impacting travel now and into the future. These forces present both opportunity and change that will shape what an industry 'fit for the future' might look like.

As a destination marketing organisation, we use our consumer and market knowledge to provide visitor economy leadership to plan and respond to the changing environment. The emerging forces we are observing include:

1. **Travelling with purpose**, enabling visitors to contribute to the places they visit, building community resources and prioritising value over volume to build a sustainable future.
2. Health concerns have shifted to **wealth concerns** with rising economic uncertainty influencing consumer confidence and the potential to impact travel choices.
3. **Wellness tourism** is growing, travellers are increasingly placing importance on how spaces make them feel. It is shaping our core markets, with authenticity and cultural sensitivity of experiences essential.
4. **Luxury and exclusivity** Adventure and exclusive wilderness experiences are becoming a trend for luxury travel with security, comfort and service remaining core pillars.
5. **Technology** that enables personalised experiences and information to help travellers make decisions in line with their values and needs, reducing the burden of research. Technology can also support flexible customer experiences and spaces that cater for leisure and remote work.
6. **Deglobalisation** The travel and aviation sectors were significantly impacted during COVID with a diversification away from existing aviation and travel routes towards a focus on local and regional markets. As the sector recovers from the pandemic, traditional travel trade business opportunities will be balanced by changed traveller sentiment and behaviour. Travellers are increasingly prioritising locally owned, smaller scale travel businesses with sustainable practices that benefit both visitors and local communities.



Mona Foma © Jarrad Seng

## Our visitor economy

Tourism plays an important part in the livelihoods of Tasmanians. It delivers a GSP of \$2.59b, a 6.7% contribution to total GSP, and fills 37,300 jobs for Tasmanians (12.1% of total Tasmanian employment) and more than agriculture, fishing, forestry and mining sectors combined. The visitor economy supports roles in both city and regional areas and is a year-round industry.



### EMPLOYMENT<sup>1</sup>

37,300 total Tasmanian jobs  
12.1% share

More than agriculture, fishing, forestry and mining combined

Higher than national average

Highest in the country



### GROWTH<sup>2</sup>

Growth in tourism outpaced that of the overall Tasmanian economy

No other state or territory where tourism makes a greater contribution



### TOURISM EXPORTS<sup>4</sup>

One fifth of all Tasmania's exports are Tourism

Tourism is 90% of all Tasmania's service exports



### GROSS STATE PRODUCT<sup>1</sup>

\$2.59B total contribution  
6.7% share

Highest in the country



### VISITOR SPEND<sup>3</sup>

\$3.96B or 159% of 2019

Domestic spend 174% of 2019



### VISITORS<sup>3</sup>

Over 1.305M or 99% of 2019

### DIFFERENCE BETWEEN GSP AND VISITOR SPEND

While visitor expenditure represents the pure financial trade flow and is often a more tangible and well understood metric, GSP reflects the specific value associated with that activity. GSP adjusts for items such as imports, taxes and margins, which are not considered as part of the value contributed by the tourism sector to the economy (i.e. imports are flows outside of the Tasmania economy, while taxes and margins are flows that are attributed to other industries).

<sup>1</sup> State Tourism Satellite Account, Tourism Research Australia, 2021-22

<sup>2</sup> State Tourism Satellite Account, Tourism Research Australia, 2021-22. For ten years to 2019, compound annual growth rate for direct tourism GDP was 5.4% per annum while economy wide growth rate was 3.4% per annum.

<sup>3</sup> Tasmania Visitor Survey, International and National Visitor Surveys

<sup>4</sup> 5368.0 International Trade in Goods and Services, Australia and 5368.0.55.003 International Trade: Supplementary Information, Australian Bureau of Statistics, 2021-22

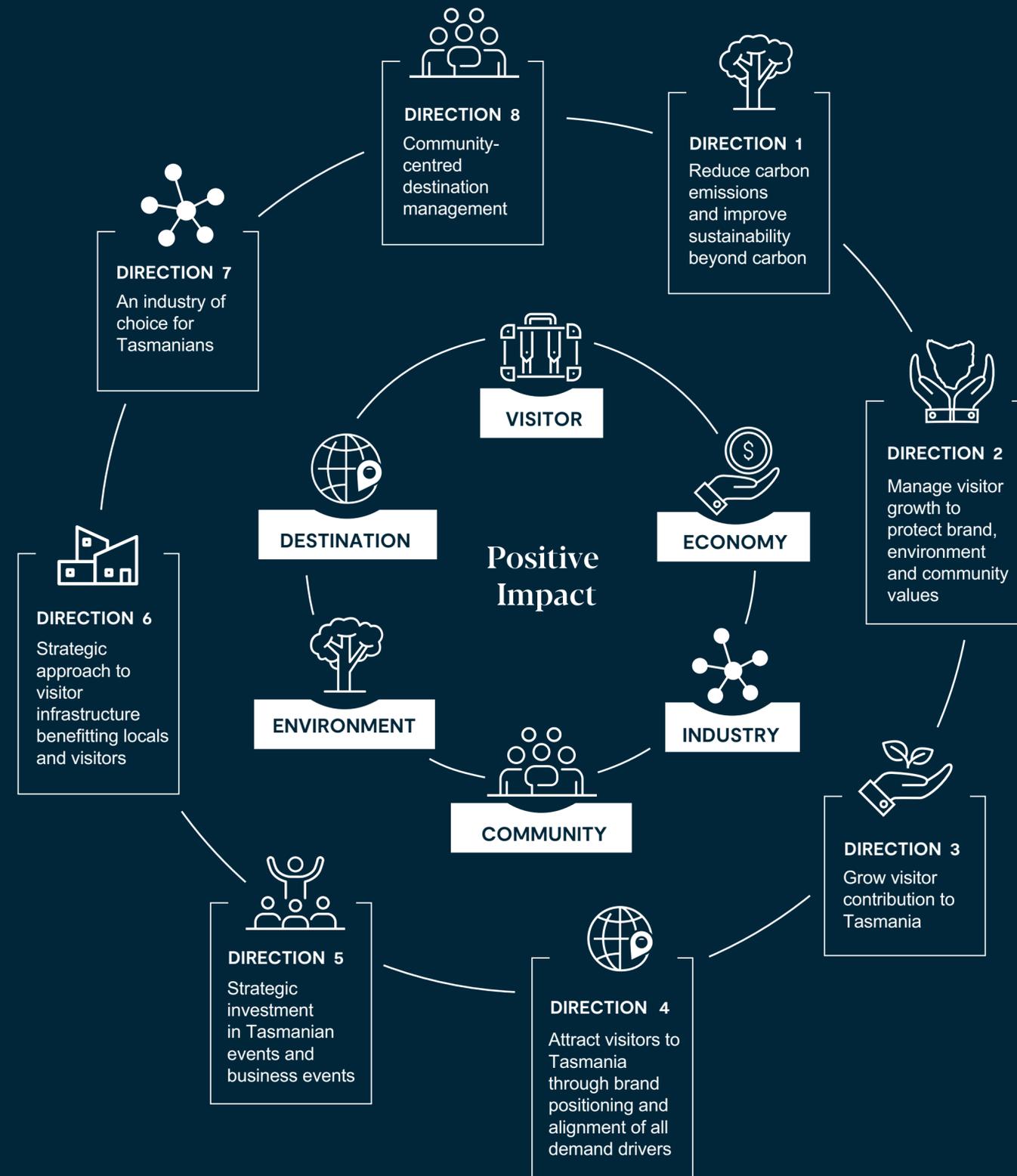
# Tasmania's 2030 Visitor Economy Strategy

Tourism Tasmania plays a key leadership role within the T21 and Premier's Visitor Economy Advisory Council (PVEAC) governance framework and has developed, in partnership with industry and with the parts of government that have a role within the visitor economy, the 2030 Visitor Economy Strategy.

The strategy aims to ensure the important contribution tourism makes to Tasmania is maintained and industry and government are aligned on a plan to strategically manage growth and investment to benefit Tasmanians and our destination.

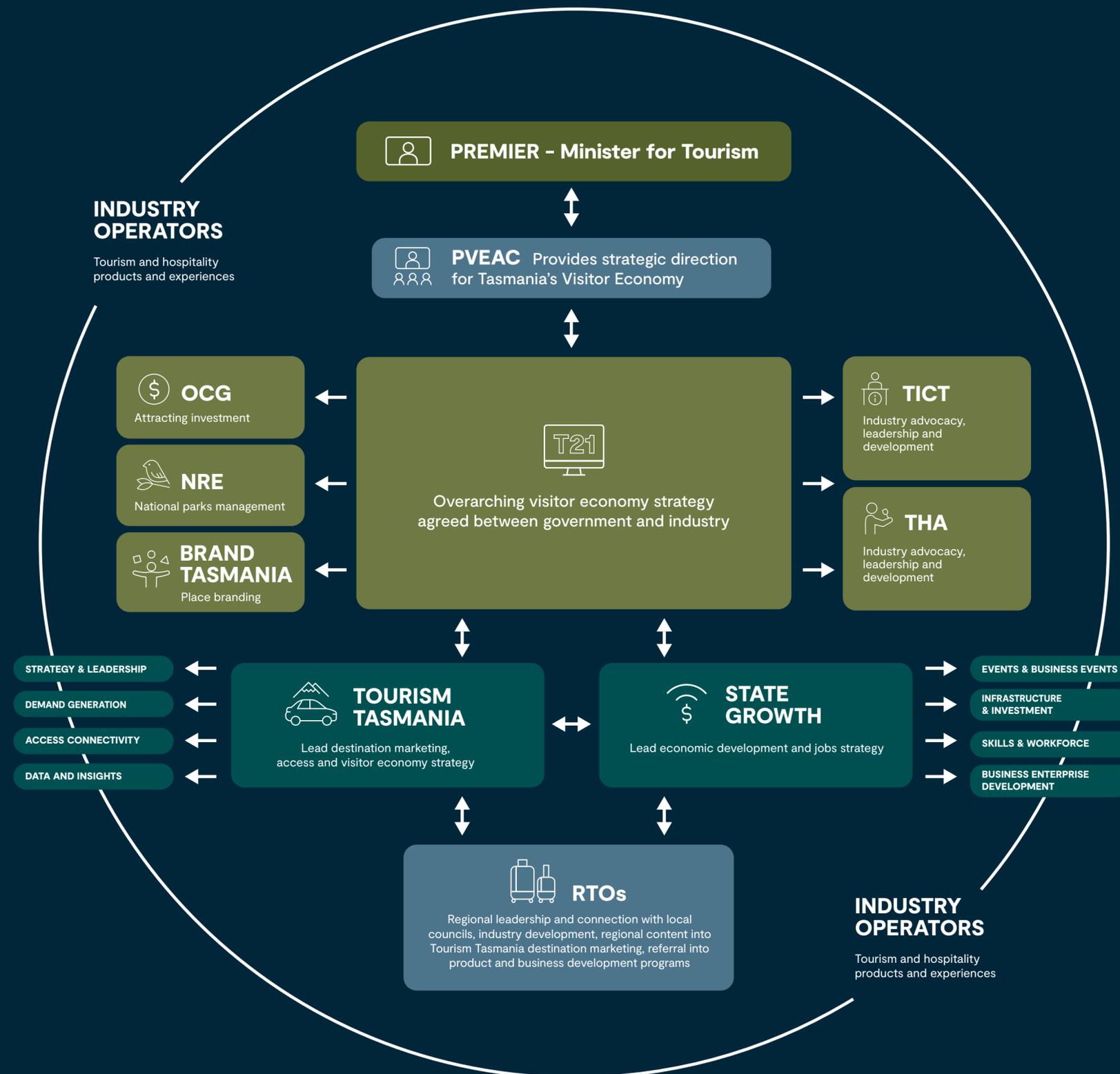
The vision is, that by 2030, the visitor economy is valued by Tasmanians for its positive impact to our environment, prosperity and way of life, and Tasmania is valued by visitors for being a genuinely different experience.

The 2030 strategy sets out eight key directions to grow and manage our visitor economy into the future, they are: →



### Tasmanian Visitor Economy Governance

Determining the most efficient and effective way the government operates across the visitor economy, and providing clarity on the primary tourism sector responsibilities across the network, will support the successful implementation 2030 strategy. The diagram right highlights the T21 governance structure, network partners, key roles and connections. Tourism Tasmania is the lead government agency for tourism.





## Tourism Tasmania's strategic focus

Our purpose is to connect travellers emotionally and culturally with our island, drive visitation and lead a sustainable visitor economy that delivers social, environmental and economic value for all Tasmanians.

As the government's lead tourism agency, Tourism Tasmania's long term strategic focus is aligned to the 2030 Visitor Economy Strategy.

Over the next 12 -18 months, our short-term focus, will be continuing to mature our demand and destination programs, respond to emerging market challenges and opportunities and ensure our work contributes to the delivery of strategic directions within the 2030 plan. This focus will include:

- **Brand positioning** that progresses our cultural branding approach and positive impact agenda to distinguish our destination and gain a competitive edge within the marketplace.
- **Reactivating our international markets** and audiences led by a new global communications and PR approach that is leveraged by our partnership with Tourism Australia and through selected airline and distribution partnerships in key markets.
- **Driving a strong communications and engagement program** that elevates our destination and stories in top-tier media, connects industry to our programs and insights and builds our community's awareness of the value of the visitor economy to our state and way of life.
- **Unlocking data and establishing a coordinated research, insights and strategy development hub** that provides a single, centralised source for visitor economy data and provides strategic insights and direction to support decision making and investment for the benefit of all stakeholders. This will be supported by the agency's commitment to maturing and sharing our data, and key visitor economy research projects, including the development and approach to understand sustainable carrying capacity models for Tasmania as a destination.

— **Maximising our digital transformation** program and investment by effectively activating our data assets and owned digital channels to support our integrated global marketing strategy.

— **Investing in our visitor economy network partners** and lead relationships with the four regional tourism organisations to inform their program design and performance reporting.

— Working collaboratively with industry and our stakeholders on activities to **promote positive impact** including environmental sustainability, accessible and inclusive visitor experiences, and progress our commitment to Tasmanian Aboriginal people and our own agency sustainability.

**Tourism Tasmania delivers its work across five key program areas:**

1. **Marketing program** delivering an integrated global strategy through cultural brand positioning, targeted and continuous content, lead generation and conversion.
2. **Destination program** delivering T21 visitor economy strategy and optimising domestic and international access connectivity.
3. **Engagement program** driving communications, connection and alignment across our stakeholder groups.
4. **People program** to grow leadership skills, capability and culture.
5. **Organisation program** delivering high performance across all systems and processes.



01 – The Agrarian Kitchen @ Tourism Australia  
 02 – Fly fishing on the Meander River @ Adam Gibson  
 03 – Ship Inn Stanley @ Marnie Hawson  
 04 – Ian Johnson, Wild Harvest Restaurant and Cooking School @ Jasper Da Seymour



# Marketing program

*Connecting with customers to generate demand.*

Tasmania is a challenger state in a national travel market that is dominated by the larger states, and our competitors' media spend is increasing.

We cannot - nor do we aspire to - compete in the same way. Our strategy is to capture the attention of customers who are most aligned to Tasmania's brand through building meaningful emotional connections and celebrating what makes a Tasmanian holiday experience distinct from other destinations.

Tourism Tasmania's Come Down for Air brand platform is the foundation of our marketing program, embodying our unique sense of being, and Tasmania's different point of view.

To grow Tasmania's destination brand appeal and position Tasmania distinctly from other destinations we continue to focus on establishing Tasmania as a culture brand, aiming to redefine destination marketing communications and push the boundaries beyond traditional category norms.

Our integrated marketing approach will ensure we connect with the right customers in our key markets. We will develop strong content opportunities across our paid and earned channels and through our enhanced digital ecosystem, better connecting and converting people throughout the customer journey, including providing enhanced leads to our industry.

We will look to establish global partnerships that connect with the right customers and will work with select distribution partners that increase the range and depth of Tasmanian products on itineraries to convert customers from intention to booking.

Our partnership with Tourism Australia will be a foundation of our international approach through consumer and trade channels, along with a new streamlined approach to our global PR strategy and implementation.

We will continue to deliver our successful Off Season program to build fans and create momentum for travel over the cooler months. Winter is when Tasmania is the most different from other parts of Australia and it's when our most 'anti-ordinary' nature comes out to play. The Off Season provides a strong opportunity to smooth out seasonal visitation, increase business sustainability and support jobs around the state and across the year.

In a world increasingly influenced by a digital and data mindset, the digital transformation of our marketing channels and tools will enable greater connection to our customers and deliver the information they seek, when they need it. It will create a more streamlined and connected customer experience that provides greater value to the planning, booking, anticipation, experiencing and post-trip phases of the customer journey across different engagement channels.

The key deliverables over the next 12-18 months through this program include:

— Evolved consumer segmentation to ensure our targeted marketing program reaches the right customers with the right message at the right time.

— An integrated global marketing program and cultural brand approach, including the next executional phase of our Come Down for Air brand platform.

— Implementing a strong global PR and content program focussed on Tasmania's strengths, including our key pillars of nature, wildlife, food and beverage as well as a growing focus on Tasmanian Aboriginal culture and experiences, sustainability, inclusivity, agri-tourism, and Unordinary Adventures.

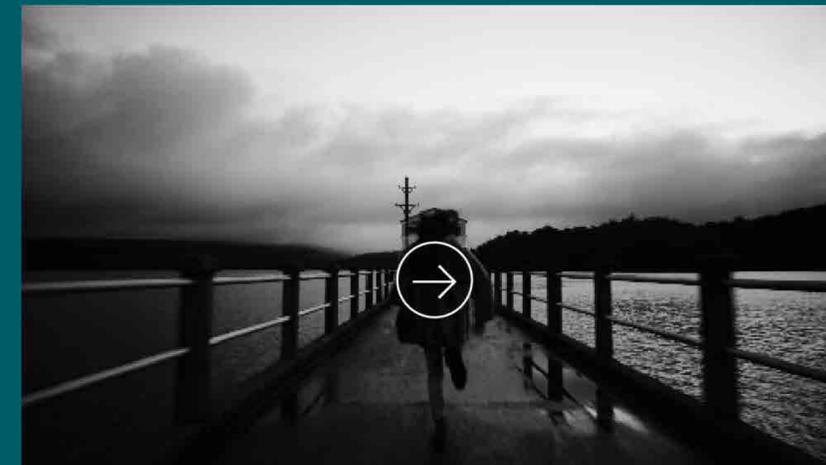
— Continuing to feature Tasmania's festivals and events in our marketing communications as an expression of our brand and as a trigger for visitation.

— Continuing to build the Off Season program to encourage travel to Tasmania over the cooler months and embed the season in culture, changing the way people think about winter in Australia.

— A continued focus on Tourism Australia partnership programs.

— Ongoing optimisation and leverage of the Discover Tasmania website and app.

DOWNLOAD PDF IN ADOBE TO WATCH VIDEO



## Our customers:

Tourism Tasmania has continued to monitor and assess the consumer landscape to ensure our marketing program targets the right customers with the right message at the right time, and accounts for the continued impacts of COVID-19 and other global events on consumer behaviour.

While the pandemic saw many people reassess what's important, with greater value placed on human connection and a desire to reconnect with nature, inflationary and cost of living pressures have started to become a source of added stress for many households. However travel intention remains high, and Tourism Tasmania continues to target consumers who have a higher propensity to travel, to spend more, and to have a positive impact on our destination.

Many consumers are making more conscious decisions, seeking meaningful respite from the stresses of modern life, and there is increased reliance on digital technology, with greater expectations of seamless online experiences.

We want to connect our customers culturally and emotionally with Tasmania. To ensure we do so effectively, a highly targeted approach is crucial. This year, following a comprehensive segmentation research study, we will introduce new consumer segments to evolve or replace our current customer segments;

Raw Urbanites and Erudites. The new segments will inform targeting choices for our marketing strategy and plans in late 2023 and beyond.

## Our markets:

### DOMESTIC MARKETS:

Until our customer segmentation project is complete we will continue to focus on our two existing domestic customer segments within the broader Australian travel market that are naturally more aligned to what Tasmania has to offer. We will deliver marketing activity in our key eastern seaboard states as well as WA, SA, QLD and some regional areas to drive demand for travel and support direct airline capacity into both Hobart and Launceston. Additionally, we will continue to engage with Tasmanians to ensure their support and advocacy of the tourism industry.

### INTERNATIONAL:

A new integrated approach to delivering our message globally will ensure we can grow Tasmania's appeal and connection in key international source markets. Public relations/earned media will form the foundation of this approach, with the appointment of a global PR agency to support a more consistent and streamlined message globally, with local in-market expertise to ensure relevance.

The international strategy will rebuild market share by focusing on the key English-language markets of New Zealand, Singapore, the United Kingdom, and the USA, along with Hong Kong, China and Germany. The direct flight service between Auckland and Hobart will be further supported with integrated brand awareness campaigns.

A strong partnership with Tourism Australia in key markets will include developing bespoke content opportunities in relevant Tourism Australia consumer and trade programs, and pursuing brand aligned partnerships that help us engage with potential visitors.



# Destination program – leading visitor economy planning

The T21 partnership is a longstanding agreement between the Tasmanian Government and the Tasmanian tourism industry represented by the Tourism Industry Council of Tasmania (TICT).

The partnership provides coordinated leadership and strategy to guide the development of the visitor economy for the benefit of all Tasmanians.

Tourism Tasmania provides a key leadership role in the T21 partnership through the development of strategy, contribution of customer and market insights, tourism sector knowledge, and funding support to partner organisations. It also provides governance and secretariat support for the Premier's Visitor Economy Advisory Council (PVEAC) and the T21 Steering Committee and supports Tasmania's participation in national committees.

The agency facilitates visitor economy planning through the T21 Steering Committee and works closely with government and tourism network partners and stakeholders including the development of the 2030 Visitor Economy Strategy.

The strategy has been informed by extensive industry consultation, current market and global trends, and a demand forecast for the visitor economy to understand and plan for the opportunities and challenges over the next decade.

The key deliverables over the next 12-18 months through this program include:

- Finalise and launch the 2030 Visitor Economy Strategy and 3-year Action Plan.
- Lead implementation of the 3-year Action Plan and strategy deliverables, through a collaborative approach across government agencies and with industry.
- Plan for increased facilities and services required to meet the increased capacity opportunity created by the new Spirits of Tasmania vessels.
- Research global sustainable carrying capacity models and develop a methodology and framework for an approach for Tasmania as a destination.



## Supporting quality tourism development and regional tourism services

Tourism Tasmania provides financial support to a number of organisations within Tasmania's visitor economy focussed on supporting business and product development through take-up of the national Quality Tourism Framework and strengthening regional industry and visitor services.

Tourism Tasmania supports and partners with the state's four regional tourism organisations (RTOs) to provide regional leadership of the visitor economy working with tourism industry operators and local government partners in their region. RTOs work with government to inform T21 strategy with the regional context and specific issues that impact industry.

Tourism Tasmania administers grant funding of \$4.4 million to the RTOs on behalf of the Tasmanian Government for the three years from 2023-24 to 2025-26. A review of the role and funding of regional tourism organisations has been undertaken with a new grant funding model confirmed for the next three years.

The agency also provides \$200,000 in grant funding to the Tourism Industry Council of Tasmania to deliver three specific programs focussed on growing quality tourism businesses and product. The funding directly supports uptake of the Quality Tourism accreditation program, Tasmanian Tourism Conference held annually in Launceston and sponsorship of the Tasmanian Tourism Awards that showcases award winners at a state and national level through the Australian Tourism Awards.

Visitor information services are supported with \$340,000 annually to assist the operation of the Tasmanian Visitor Information Network and Tasmania's two main gateway visitor centres in Hobart and Launceston. A review is underway into the future visitor information and engagement model which may influence future funding.



## Access

Achieving strong access to our island state benefits both our visitors and the Tasmanian community and stimulates the wider economy. During the COVID period new direct air services from Hobart and Launceston to Adelaide, Perth, Canberra and the Gold Coast were introduced.

Our access strategy will continue to focus on maintaining Tasmania's direct air services and growing frequency and capacity through our core hubs of Melbourne, Sydney and Brisbane.

We will also continue to drive demand for our international services between Hobart and Auckland with a view to ensuring this route becomes a viable and permanent year-round service for the years ahead.

The program will manage and nurture important relationships with our airline and access partners and pursue strategic partnerships with international carriers that can support our one-stop to the world strategy either through direct services to Asia and Perth, through our mainland east coast capitals and through Auckland to the USA and South Pacific.

We will further develop relationships in the cruise shipping sector to optimise the opportunity the cruise market presents for the industry and community, while minimising destination impacts.

The key deliverables over the next 12-18 months through this program include:

- Deliver a 5 year Tasmanian aviation strategy that aligns to the 2030 Visitor Economy Strategy.
- Maintain strong relationships with domestic carriers to maintain and grow direct air services building frequency and scheduling.
- Pursue international connectivity through Asia and continue to support and consolidate direct New Zealand route.
- Deliver a 5 year cruise strategy that leverages the value proposition of cruise shipping to optimise the benefit to Tasmania and its regions.
- Work collaboratively with the TT-Line (Spirit of Tasmania) to coordinate marketing and maximise opportunities to build the touring and self-drive market.



Goose Island Lighthouse © Jarrad Seng

# Engagement program

Tourism Tasmania's program is achieved collaboratively, and a renewed communications and engagement program will enhance our reputation and relationships with industry, community, government and visitor economy stakeholders, and strengthen our ability to deliver our goals.

Sharing our research, insights and knowledge will enable informed decision making across the private and public sector and support the development of productive and sustainable businesses.

We will grow our relationships with media and advocates who can influence and communicate with consumers, elevate our destination's voice and tell the stories of our people and place targeting top tier media publications and connecting with audiences across our key markets.

Building ambassadors for Tasmania through strong connection with travel trade through our partnership, trade events and training programs will educate and connect frontline travel agents and sellers to Tasmania and our industry products and experiences.

Providing robust executive government support and ensuring our statutory requirements are met will continue and we will ensure the positive impact the tourism sector can deliver for industry, government and the community is well understood.

The key deliverables over the next 12-18 months through this program include:

- Drive a robust data and insights program and share intelligence with stakeholders to improve performance of our programs and support our industry.
- Drive greater industry communications, connection and engagement with our programs and improve connection between customer and industry within our owned assets.
- Deliver communications strategies that support the positive impact commitment.
- Progress our commitment with Tasmania's Aboriginal community to ensure our role supports their aspirations for involvement in the sector.



# People program

Tourism Tasmania is a values-aligned organisation that aims to empower personal leadership, curiosity, creativity and collaboration and build a culture of connection to our work.

Our people strategy focus is to build and attract a capable and talented team that is skilled, connected and empowered to deliver our strategic programs. This includes:

- Create a unique, positive and desirable culture where the employee experience is aligned with our brand, values and strategy.
- Build capabilities that we need now and into the future, offering industry relevant career development.
- Ensure alignment between individual roles and our strategy and program.
- Strive for highly effective leadership in action through individuals and leadership teams.
- Create an environment that cares for the individual and supports the team to be at their best to optimise performance.
- Share and build on our collective knowledge of our place and our industry.
- Provide tools, systems and processes that enable achievement and enhance productivity.





We prioritise learning and growth to support our people to contribute deeply, strengthen industry network relationships, develop connection with the community and provide influential leadership.

The key deliverables over the next 12-18 months for our people program include:

- Continue culture build that capitalises on our leadership development and unique value proposition.
- Develop greater data literacy and insights capability to both learn from and share with industry for mutual benefit and gain.
- Continue to build connection to place and people, grow cultural awareness and increase our product knowledge, operator engagement, insights sharing to support greater understanding of industry and community.
- Provide a positive employee experience to create a diaspora of future leaders to advocate for and influence the impact of tourism and act as stewards of our destination.



# Organisation program

We will continue to prioritise our growth as an organisation, ensuring the highest standards of governance and accountability and continually improving our systems and processes, building the strength of the agency to meet current and future business program needs.

The ongoing development of an integrated enterprise system to consolidate and further embed our digital systems is key and we will prioritise our data stewardship responsibilities through our data strategy.

We will continue to look for greater efficiencies in our operating systems, ensuring they are consistent and optimised to best support the delivery of our program including decision making, accountability and performance measurement.

We will enhance the effectiveness of the organisation through board effectiveness, risk management, control and governance procedures and drive improvement through operational and performance internal audits.

We will advance our commitment to sustainability, implementing our internal sustainability framework to reduce our carbon footprint and supporting collective efforts by industry and government towards a positive impactfuture.



The key deliverables over the next 12-18 months for our organisation program include:

- Maintain commitment to high standards of governance and accountability including strategic risk, budget management, and statutory compliance and reporting.
- Develop and implement Data Strategy and Enterprise System Roadmap.
- Optimise systems and processes, identify priority tools and make available resources to deliver our strategy.
- Work towards the development of a Contract Impact Assessment Framework to measure the effects of our work on the economy, environment and community.
- Realise operational efficiencies to reduce carbon emissions produced by Tourism Tasmania, and demonstrate our commitment to sustainability (and other positive impact focus areas) by reviewing how we market and select and engage partners.
- Establish an Environment, Social and Governance (ESG) framework and performance measures for tracking progress.



# Performance Reporting

The 2030 Visitor Economy Strategy has forecast estimated visitor expenditure by interstate and international visitors of \$5.6 billion with estimated expenditure by Tasmanian travellers estimated to be \$1.4 billion.

As the 2030 Visitor Economy Strategy is finalised, new benchmarks and measures will be determined to measure impact, inform reporting and track progress across six indicators of community, environment, destination, visitor, economy and industry.

The agency will review the T21 measures identified and consider them as part of a performance framework that includes the following key program performance measures:

- Strong brand equity relative to competitors tracking brand meaning, difference and salience (benchmark 10.7, 2022)
- Increased leads to industry across digital and conversion channels (benchmark tbc)
- Average holiday visitor spend is at least \$3,327 by 2025 (benchmark +15% from 2019)
- Met all statutory obligations
- Increase stakeholder satisfaction with agency (benchmark NPS 7.1, 2022)



# Risk management

Tourism Tasmania promotes a strong risk management culture to ensure the agency delivers on its objectives and priorities.

Tourism is a recognised global business sector that is readily impacted by global economic factors including but not limited to, exchange rate levels, availability of credit for investment, geopolitical instability, and impacts of climate change and significant environmental events. The agency's key strategic and operational risks reflect the significantly changed operating environment in which we find ourselves two years into a pandemic.

Risk is owned by the Board of Tourism Tasmania with active oversight by the Audit and Risk Committee. The agency Strategic and Operational Risk Register is focused on the risks which Tourism Tasmania has either direct responsibility for or has the ability to influence.

## Risk register

### CATEGORY AND RISK

#### Brand & Experience

Misalignment of Tasmania’s tourism brand and execution of the marketing strategy to visitor experience

#### Marketing

Inability to shift consumer behaviour to travel to Tasmania as a result of changing and uncertain market conditions (e.g. competition, environmental, economic or global events)

#### Data & Digital

Ineffective implementation, use or performance of enabling digital tools and platforms to deliver effective digital experiences

#### Strategy & Governance

T21 Governance and operating efficiency does not maximise our contribution to a sustainable visitor economy

#### Access & Access Partnerships

Loss or reduction of air and sea access or capacity does not grow in line with demand in Tasmania

#### People & Culture

Misalignment of skills and capabilities that comprises the delivery of strategic and operational programs

#### Government & Partners

Government, industry and community are not aligned or supportive of Tourism Tasmania’s program and objectives, impacting the ability to deliver the agency purpose

#### Operations

Inadequate tools and systems to support a productive work environment and culture

#### Business Continuity

Loss or disruption of capabilities/key resources, systems and/or loss of critical business functions

#### Work, Health, Safety & Wellbeing

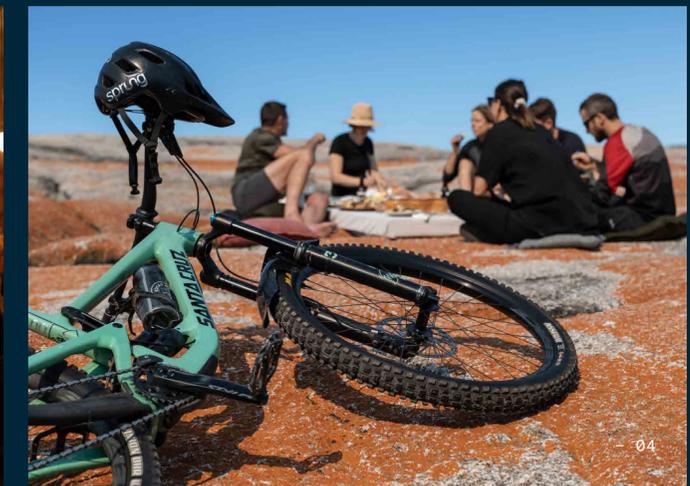
Inadequate implementation of Work Health Safety & Wellbeing strategies and policies

#### Conduct & Third Parties

Illegal or unethical conduct may not be prevented or detected

#### Legal Regulatory, & Compliance

Ineffective management of contracts and agreements including compliance with legal, regulatory and contractual terms and conditions



01 – Junction Arts Festival @ Jacob Collings  
02 – Wild Cave Tours @ Tourism Australia  
03 – Russell Falls track, Mount Field National Park @ Dearna Bond  
04 – Blue Derby Pods Ride @ Tourism Australia

# Program on a page

Tourism Tasmania's role is as a demand generator and brand leader in Tasmania's visitor economy

OUR ROLE:	Connect travellers with our island and drive visitation	Provide visitor economy leadership	Deliver social, environmental and economic value for Tasmanians
<b>OUR PROGRAMS:</b>	<b>OUR OBJECTIVES:</b>		
<b>MARKETING PROGRAM</b>	To connect with customers to generate demand.	Grow Tasmania's brand power and support access connectivity.	Increase leads to industry across consumer and conversion channels.
<b>DESTINATION PROGRAM</b>	Advocate and secure strong access to our island to benefit both visitors and the Tasmanian community.	Lead, influence and inform visitor economy strategy and drive a research and insights program that powers marketing and visitor economy strategy on behalf of government in partnership with industry.	Providing financial support to organisations within the visitor economy network to drive delivery of T21 objectives.
<b>ENGAGEMENT PROGRAM</b>	Communicate, engage and build positive relationships with industry and stakeholders to deliver our programs and visitor strategies and priorities.		Manage corporate reputation and communicate value of tourism to Tasmanians.
<b>PEOPLE PROGRAM</b>	Build and attract a capable and talented team that is skilled, connected and empowered to deliver our strategic programs.		Grow current and future capabilities including leadership skills and workplace culture.
<b>ORGANISATION PROGRAM</b>	Organisation program that ensures systems, processes and resources are maximised and aligned to the delivery of strategy.		Measure agency performance and effectiveness.
<b>MEASURING SUCCESS</b>	<b>Key agency performance measures</b> <ul style="list-style-type: none"> <li>– Strong brand equity relative to competitors tracking brand meaning, difference and salience (benchmark 10.7)</li> <li>– Increased leads to industry across digital and conversion channels (benchmark tbc)</li> <li>– Average holiday visitor spend is at least \$3,327 by 2025 (+15% from 2019)</li> <li>– Increase stakeholder satisfaction with agency (benchmark net promoter score 7.1)</li> <li>– Met all statutory obligations</li> </ul>		<b>Key T21 performance measures</b> <p>By 2030, forecast visitor expenditure by interstate and international visitors is estimated to be \$5.6 billion and expenditure by Tasmanian travellers will be \$1.4 billion.</p>

# Financial Statements

## Statement of cash flows for the period ended 30 June

	2021-2022 Actual \$,000	2022-2023 Budget \$,000	2023-2024 Budget \$,000	2024-2025 Estimate \$,000	2025-2026 Estimate \$,000	2026-2027 Estimate \$,000
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>						
Payments						
Employee	(7,940)	(8,058)	(8,441)	(8,683)	(9,099)	(9,767)
Other (inc. Grants)	(38,726)	(35,196)	(30,223)	(29,247)	(29,371)	(21,351)
Receipts						
Govt appropriation <sup>1</sup>	35,101	40,084	37,745	37,208	37,741	30,382
Appropriation receipts - other	3,630	345	204			
Grants	4,590	2,736				
Other	944	708	715	722	729	736
<b>Net cash from operating activities</b>	<b>(2,401)</b>	<b>619</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Net increase/(decrease) cash	(2,401)	619	0	0	0	0
Payments for acquisition of non-financial assets	(1,697)					
Cash at beginning of period <sup>1</sup>	5,024	93	1	1	1	1
<b>Cash at end of period</b>	<b>926</b>	<b>712</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>

## Income statement for the period ended 30 June

	2021-2022 Actual \$,000	2022-2023 Budget \$,000	2023-2024 Budget \$,000	2024-2025 Estimate \$,000	2025-2026 Estimate \$,000	2026-2027 Estimate \$,000
<b>REVENUE</b>						
Government Appropriation <sup>1</sup>	35,101	40,084	37,745	37,208	37,741	30,382
Other revenue from Government Grant <sup>2</sup>	9,186	8,409	204			
Other revenue	943	708	715	722	729	736
<b>Total revenue</b>	<b>45,230</b>	<b>49,546</b>	<b>38,664</b>	<b>37,930</b>	<b>38,470</b>	<b>31,118</b>
<b>EXPENSES</b>						
Operating <sup>2</sup>	42,885	43,050	38,521	37,786	38,325	30,612
Depreciation	71	22	460	458	458	479
Other	203	204	207	210	214	229
<b>Total expenses</b>	<b>43,159</b>	<b>43,276</b>	<b>39,188</b>	<b>38,454</b>	<b>38,997</b>	<b>31,320</b>
<b>Net change to equity</b>	<b>2,071</b>	<b>6,270</b>	<b>(524)</b>	<b>(524)</b>	<b>(527)</b>	<b>(202)</b>

1. The decrease in Appropriation revenue - operating primarily reflects the profile of funding for prior year Budget initiatives and the Additional Marketing initiative.

2. The decrease in Grants and Operating costs in 2023-24 reflects the completion of the Australian Government's Recovery for Regional Tourism Program.

## Balance sheet for the period ended 30 June

	2022 Actual \$,000	2023 Budget \$,000	2024 Budget \$,000	2025 Estimate \$,000	2026 Estimate \$,000	2027 Estimate \$,000
<b>Financial assets</b>						
Cash <sup>1</sup>	926	712	1	1	1	1
Receivables <sup>1</sup>	297	852	297	297	297	297
<b>Total financial assets</b>	<b>1,223</b>	<b>1,564</b>	<b>298</b>	<b>298</b>	<b>298</b>	<b>298</b>
<b>Non-financial assets</b>						
Plant and Equipment	27	223	168	146	124	102
Intangibles <sup>2</sup>	1682	0	1744	1308	872	436
Other assets <sup>1</sup>	547	238	362	362	362	362
<b>Total non-financial assets</b>	<b>2,256</b>	<b>461</b>	<b>2,274</b>	<b>1,816</b>	<b>1,358</b>	<b>900</b>
<b>TOTAL ASSETS</b>	<b>3,479</b>	<b>2,025</b>	<b>2,572</b>	<b>2,114</b>	<b>1,656</b>	<b>1,198</b>
<b>Liabilities</b>						
Payables <sup>1</sup>	235	633	235	235	235	235
Employee Benefits <sup>1</sup>	1595	1577	1659	1725	1794	1538
Other Liabilities <sup>1</sup>	1090	10	10	10	10	10
<b>Total liabilities</b>	<b>2,920</b>	<b>2,220</b>	<b>1,904</b>	<b>1,970</b>	<b>2,039</b>	<b>1,783</b>
<b>NET ASSETS (liabilities)</b>	<b>559</b>	<b>(195)</b>	<b>668</b>	<b>144</b>	<b>(383)</b>	<b>(585)</b>
<b>Equity</b>						
Accumulated funds	559	(195)	668	144	(383)	(585)
<b>TOTAL EQUITY</b>	<b>559</b>	<b>(195)</b>	<b>668</b>	<b>144</b>	<b>(383)</b>	<b>(585)</b>

1. The variation in this item reflects revised estimates based on 30 June 2022 actuals.

2. The variation in Intangibles reflects the treatment of Tourism Tasmania's new Discover Tasmania website launched in 2021-22.