TOURISM TASMANIA

Honeymoon Bay © Krista Eppelstun

Tourism Tasmania corporate plan 2024-2027

TASMA

FOR AIR

STATEN







Dove Lake from Cradle Mountain © Blake Lisk - Pillar Creative We acknowledge the Tasmanian Aboriginal people and their enduring custodianship of lutruwita (Tasmania).

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

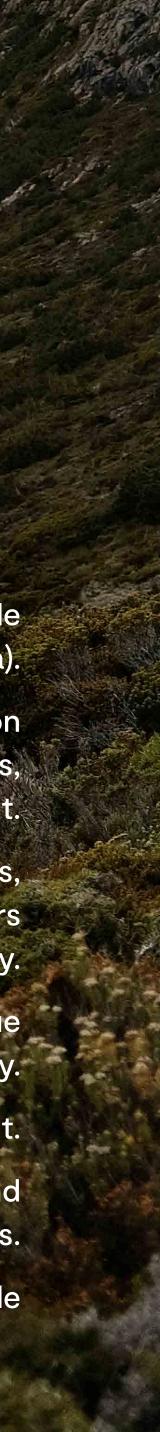
As part of a tourism industry that welcomes visitors to these lands, we acknowledge our responsibility to represent to our visitors Tasmania's deep and complex history, fully, respectfully, and truthfully.

> 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.

Read <u>Our Commitment</u> to the Tasmanian Aboriginal people



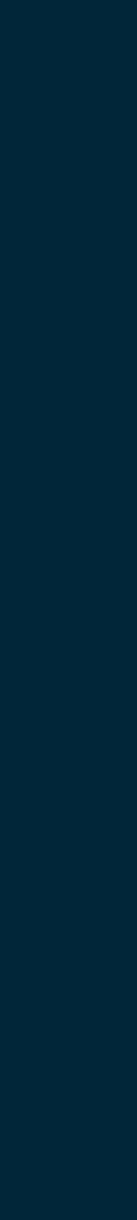


Willie Smith's Apple Shed © Stu Gibson

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2030 VISITOR ECONOMY STRATEGY STRATEGI FOCUS

About Tourism Tasmania

Tourism Tasmania is the state government's lead tourism agency.

It is a State Authority established in 2014 and a Statutory Authority established under the *Tourism Tasmania Act 1996.* It is governed by a skills-based board appointed by the Governor of Tasmania on the recommendation of the Minister for Tourism.

Tourism Tasmania leads the T21 visitor economy partnership by actively managing and contributing tourism expertise to strategy and policy development for the benefit of all Tasmanians.

The agency leads, develops and manages the state's tourism brand and generates demand for travel to the state providing social, economic and cultural benefits for Tasmania's tourism industry, economy and community.



Tahune Adventures - Swinging Bridges Walk © Tourism Australia ES OUR GUIDING GOALS

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Statement of corporate intent

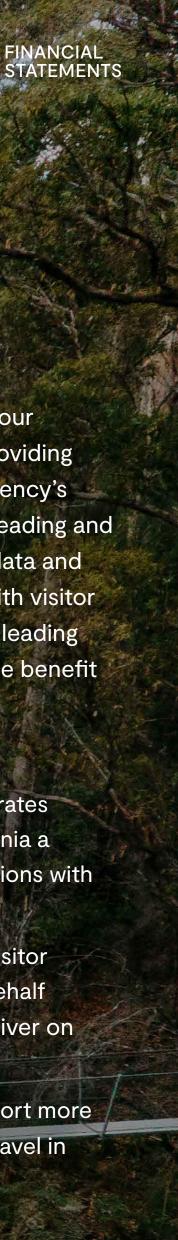
The Tourism Tasmania Corporate Plan 2024 – 2027 outlines our role in tourism brand leadership, demand generation and providing leadership in Tasmania's visitor economy. It describes the agency's role in generating demand for visitation as well as its role in leading and influencing the development of policy, sharing insights and data and planning for the future visitor economy. Our collaboration with visitor economy stakeholders 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:

A brand platform and marketing program which celebrates the identifiable character and spirit that makes Tasmania a special place, creates cultural and emotional connections with customers and encourages travel to Tasmania.

Leading, influencing and informing Tasmania's 2030 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.



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Executive summary



i DOWNLOAD PDF IN ADOBE TO WATCH VIDEO

Tourism is vital to Tasmania's economy, community and way of life.

Visitors to our state make an economic contribution to all regions and spend more than \$3.5 billion annually in Tasmania. For every one-dollar visitors spend, another 83 cents is generated in our economy and Tasmanian businesses and helping to fund important public infrastructure.

In Tasmania, 1 in 8, or nearly 43,000, local jobs rely on tourism. More than agriculture, fishing, forestry and paper production combined.

Tourism supports small businesses, entrepreneurs, and innovators hardworking Tasmanians who are passionate about their communities and protecting our place.

The tourism sector is operating within an increasingly challenging environment. Lower discretionary spend and rising business costs coupled with ongoing economic headwinds mean we cannot afford to risk standing still.

Many other places with much bigger budgets are investing heavily to attract holiday visitors to their destinations.

To stay competitive and remain in the hearts and minds of consumers, we must continue to build our unique brand strategically and target the right people at the right time who will contribute positively to our community and environment.

Tourism Tasmania's corporate plan is aligned to Tasmania's 2030 Visitor Economy Strategy, which launched in 2023 and sets the direction for the Tasmanian Government in partnership with industry to manage our visitor economy sustainably.

We will continue to deliver on our purpose of providing visitor economy leadership, leading and managing Tasmania's tourism brand, generating demand for travel, converting demand into bookings and, advocating and securing access capacity to the state.

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Tasmanians benefit from more flight choices, and more affordable access to and from our state, due to the demand for travel generated by our visitors.

Our guiding goals are to remain a market leader in destination marketing, share our data and insights to support informed decision making and increase engagement across the visitor ecosystem.

We will continue to grow demand through alignment of all demand drivers and position Tasmania as a year-round destination for domestic travellers. We will evolve our investment internationally to ensure we target the right markets for the future.

Importantly, we will deliver a Tourism Tasmania specific positive impact plan that aligns with our visitor economy goal of being a leading sustainable travel destination.

Supported by our values, internally we will focus on investing in our people, simplifying our base for effective and efficient operations, delivering value over volume and createing space for creative difference.

Through leadership, collaboration and hard work we are focused on delivering our strategy for the benefit of all Tasmanians.

Sarah Clark Chief Executive Officer May 2024

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The value of tourism to Tasmania

When tourism benefits, Tasmanians benefit.

For more than 130 years tourism has empowered Tasmanian communities around the state.

Creating jobs, strengthening our economy, supporting infrastructure development and enhancing local services, recreational activities and our quality of life.

Tourism helps promote and protect what makes Tasmania special - our environment, heritage, wildlife and culture.

It is the backbone of our brand; unlocking trade, innovation, and providing opportunities for business and entrepreneurship, supporting nearly 43,000 Tasmanian jobs.

Increased demand for travel to Tasmania from our visitors, means Tasmanians benefit with more choices for cafes, restaurants, accommodation and experiences and more affordable access to and from our state.

Yet we also know there are many other places around Australia and the world trying to attract holiday visitors, which is why we must continue to invest in marketing, events and infrastructure that benefits visitors and locals, to ensure Tasmanian communities have a strong future and can continue to enjoy the benefits tourism provides.

Sarah Clark, CEO Tourism Tasmania May 2024

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42,900 (13%) Tasmanian jobs rely on tourism.



In 2023, visitors spent **\$3.63 billion** directly in Tasmania.



The first tourism industry in Australia to take steps to **reduce carbon** emissions, with more than 100 operators leading the way, removing tonnes of CO2 from our atmosphere. (TICT)



55.3% of jobs on Tasmania's east coast depend on tourism.



Tasmania had **36** tourism projects in the pipeline in 2022-23 worth \$2.8 billion.



More than **10,000** people visit the Discover Tasmania website every day.



There are over **6,600** tourism businesses in Tasmania.



Tasmania is a net-zero destination and one of only four carbon negative places globally.



81% of visitors are likely to recommend Tasmania as a holiday destination.



For every dollar spent in tourism, a further 83 cents is generated in the economy.



More than 50% of Tasmania is protected as national parks or reserves.



Tourism Tasmania's PR program reaches **4.4 million** people globally every week.



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Tasmania's 2030 Visitor Economy Strategy

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

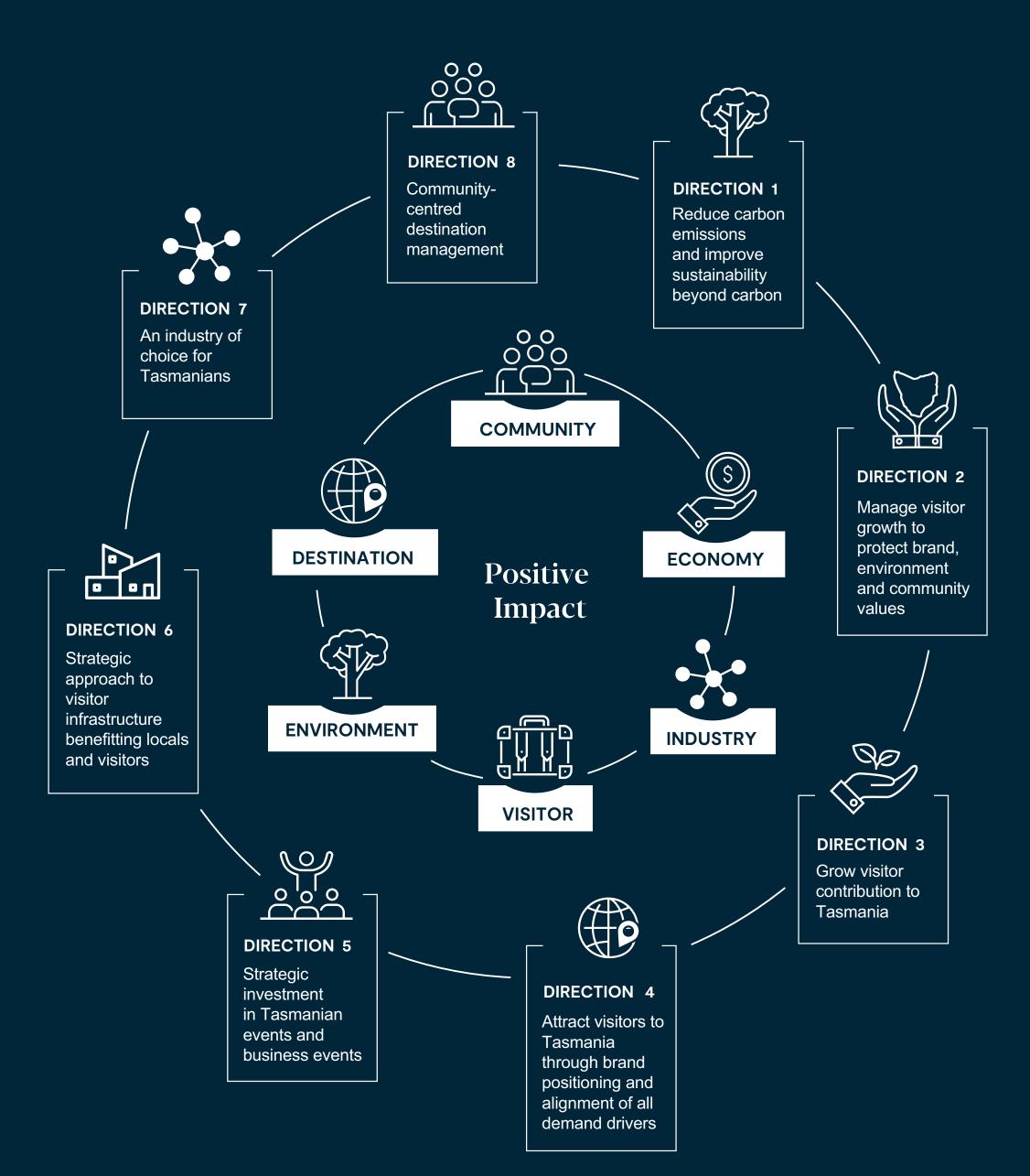
The strategy, launched in August 2023, aims to ensure the important contribution tourism makes to Tasmania is maintained and, industry and government are aligned on actions and priorities to strategically manage growth and investment, for the benefit of Tasmanians and our destination.

Tasmania's 2030 Visitor Economy Strategy includes eight key directions to proactively manage growth; protect and enhance Tasmania's brand, environment and community values; grow visitor contribution to Tasmania; and attract visitors to Tasmania through brand positioning and alignment of all demand drivers. The <u>Three Year Action Plan</u>, released with the strategy, includes 11 areas of work. Five have been endorsed by the Premier's Visitor Economy Advisory Council (PVEAC) as the highest priorities for implementation:

- —— Environmental sustainability
- Growing visitor contribution
- Infrastructure planning and investment
- Strategic and coordinated approach to driving demand; and
- Attracting and retaining a skilled and available workforce.



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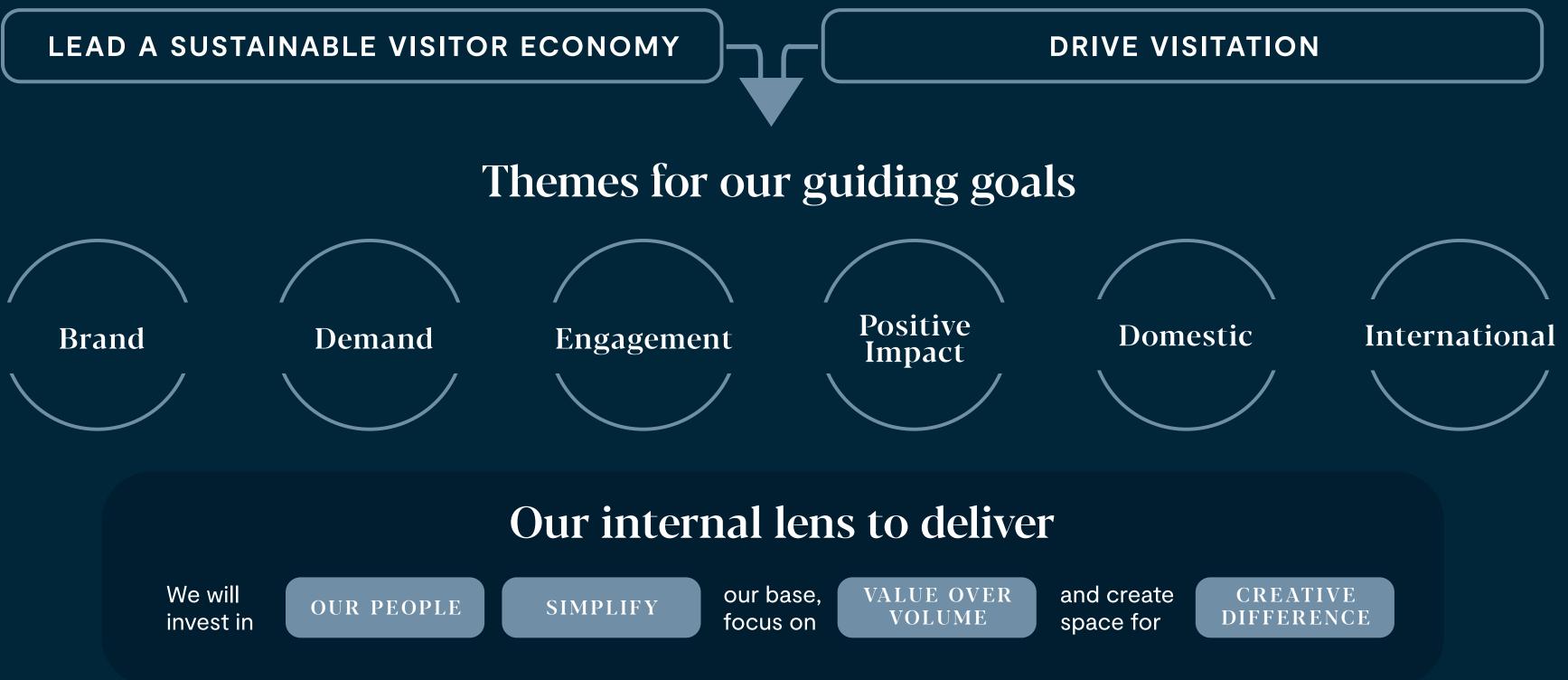
VALUE OF TOURISM

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Tourism Tasmania's strategic focus

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



Our purpose



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Our values

Passionately Connected

We are grounded in our shared purpose and strong connection to each other, our industry, our island, and the Tasmanian community. We are a part of an integrated ecosystem.

Authentically Human

We cultivate a "no bullshit" environment where respect, vulnerability, fun, and empowerment coexist. We value difference and our trust in each other, holding space for true authenticity.



Stanley 🛛 Sean Scott Photograph

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Fearlessly Forward Thinking

We seek the "air" to be brave. We use our collective courage to navigate challenges, think big, push boundaries, and be creative in the face of uncertainty.

Quietly Pursuing Extraordinary

We do the hard things, lead with accountability, and do great work - always with an added dash of Tassie magic. We are a challenger brand in every way.





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Our guiding goals

1. Brand

Remain a market leader for meaningful difference in destination marketing while growing our value proposition.

KPI: Brand power and Pricing power

2. Demand

Grow demand through investment, support and alignment of all demand drivers maximising visitation to Tasmania.

KPI: Alignment and tracking mechanisms delivered for all demand drivers

4. Positive Impact

Progress our goal of being a leading sustainable travel destination in Australia and beyond.

KPI: Delivery of Tourism Tasmania positive impact plan in alignment with Tasmania's 2030 Visitor Economy Strategy.

5. Domestic

Position Tasmania as a priority, year-round destination for domestic travellers.

KPI: Maintain total visitor expenditure above \$3.6b and average spend per visitor above \$2,888

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3. Engagement

Increase collaboration and engagement with industry and our wider tourism ecosystem, sharing data and insights for positive and informed decision making.

KPI: Delivery of the Tourism Hub in FY 2025

6. International

Evolve our understanding of priority and emerging markets and strategically invest in the right International markets for the future.

KPI: Return to 3.1% Tasmanian market share of international visitors to Australia





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1. Brand

Remain a market leader for meaningful difference in destination marketing, while continuing to grow our value proposition.

Brand platform

We will continue to focus on our culture brand evolution, utilising our Come Down for Air brand platform, ensuring space for proactive point in time opportunities and evolution of our Off Season offering.

Partners

We will focus on brand aligned partners to help reach our priority traveller segments.

PR

We will further enhance our earned media approach, bringing to life key Tasmanian stories. With a focus on our six content pillars, we will deliver engaging information to inspire travel to Tasmania.

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2. Demand

Grow demand through investment, support and alignment of all demand drivers maximising visitation to Tasmania.

Aviation

As an island, aviation is integral to visitation. We will work with airlines and airports to ensure alignment of aviation capacity with seasonal demand.

Lead generation

We will increase leads to industry across consumer and conversion channels, via our key partners and digital ecosystem.

Events

We will help elevate events, arts, culture and sports tourism to maximise positive visitation impact across Tasmania, as well as leveraging wider Australian mass visitation events.



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3. Engagement

Increase collaboration and engagement with industry and our wider tourism ecosystem, sharing data and insights for positive and informed decision making.

Visitor Economy leadership

We will lead and collaborate with our wider tourism ecosystem including regional tourism organisations, government, industry associations and operators to drive and deliver Tasmania's 2030 Visitor Economy Strategy.

Communication and engagement

We will deliver weekly news to industry through our Tourism Tasmania newsletter and corporate social channels, as well as live webinars, small engagement sessions and at least two face-to-face industry update events each year.

Tourism Hub

We will deliver improved access to data and insights, marketing content and reporting for key stakeholders through the development of a new corporate website, the Tourism Hub. LUES OUR GU GOALS

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4. Positive Impact

Progress our goal of being a leading sustainable travel destination in Australia and beyond.

Storytelling

We will introduce a new positive impact pillar to our marketing program, to inspire consumers to experience our net zero state, and encourage industry to embrace sustainable practices within their business.

Sustainability projects

We will focus on 2030 aligned project work including supporting Tasmanian Tourism businesses to decrease their carbon emission and adoption of circular economy practices, while progressing Tasmania's alignment with key global sustainability organisations and goals.

Research projects

We will progress key research projects that focus on future visitation sustainability for our state.

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5. Domestic

Position Tasmania as a priority, year-round destination for domestic travellers.

Target audiences

We will target Positive Impact Travellers, Conscious Adventurers, Discoverers and high-income travellers across the key markets of WA, SA, QLD, NSW and VIC.

Smoothing out seasonality

We will deliver two hero brand campaigns aligning with a winter and shoulder season focus, positioning Tasmania as a year-round destination.

Regional dispersal

We will continue to evolve and invest in, project 'Marketing our Regions' to share benefits across the state.

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6. International

Evolve our understanding of priority and emerging markets and strategically invest in the right international markets for the future.

Priority markets

We will continue to drive the priority markets of USA, UK, Singapore, China, Hong Kong and New Zealand. These markets will have campaigns with trade partners, PR representation in market and be priorities for our Tourism Australia content partnership marketing.

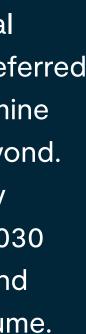
Emerging markets

We will work with Tourism Australia on opportunities in emerging markets, across trade and our international media program.

Market review

We will conduct an international market review and research preferred markets for Tasmania to determine our approach for FY25 and beyond. Ensuring alignment with the key demand goals for Tasmania's 2030 Visitor Economy Strategy around seasonality and value over volume.







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Marketing program

Tasmania is a challenger state in a national travel market that is dominated by the larger states, with competitor media spend 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. We are focused on value over volume and targeting the right people with the right message at the right time. Our focus will be to continue to evolve the successful Come Down For Air brand platform with campaigns that ensure Tasmania stands out in busy advertising environments and maintains relevance in key markets.

Our Off Season campaign will continue to position Tasmania as a unique and 'must-do' winter experience, highlighting the positive differences of a Tasmanian winter holiday compared to other destinations.

We will continue to deliver a fully integrated marketing program through a range of activities to raise awareness of Tasmania as a holiday destination, drive

demand and importantly increase leads to industry and encourage conversion or bookings.

Our marketing program will target travellers in domestic and international markets through brand and advertising campaigns, digital content, social media, PR, famils and strategic partnerships with trade, distribution and access partners.

Tourism Tasmania aims to reach the right audiences who will appreciate and value what Tasmania has to offer. Our most recent segmentation study in 2023 provided a holistic understanding of the Australian travelling market, and identified the most suitable segments to help us drive value over volume.

The new key segments represent a more sizable opportunity from the total market than previously. Our marketing will target three core segments of Positive Impact Travellers, Discoverers and Conscious Adventurers. These segments include 'high value travellers', who tend to spend more on travel. While we are targeting these specific segments, our marketing program will reach the broader travelling market through a 'halo' effect.

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DOMESTIC

CONSCIOUS ADVENTURERS

Seeking once in a lifetime experiences. Both socially and environmentally conscious.

POSITIVE IMPACT TRAVELLERS

Strong values around helping others and the environment.

DISCOVERERS

Driven to seek adventures off the beaten path.

60% high value travellers in these segments Income > \$100k = higher travel spend.

Qualified leads, converted leads and curious travellers.



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Target Audiences

Who we attract and nurture:





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Marketing strategy

CREATE DEMAND

CULTURAL BRAND

Grow Demand Power and Pricing Power by building meaning, difference, salience and consideration

Supported and enabled by:

Our brand is what we are. The collective sum of everything we believe, say and do, and how we make people feel.

RESEARCH AND INSIGHTS

Research and insights that power marketing strategy, performance and effectiveness

CONTENT

Delivering meaningful and relevant content that engages audiences and tells the Tasmanian brand and destination story

MARKETING OUR REGIONS

Ensuring regional balance across our program to encourage regional dispersal.



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CONVERT DEMAND

LEAD GENERATION AND CONVERSATION

Increase leads to industry across consumer and conversion channels

BRAND

DIGITAL EXPERIENCE

To create one seamless, functional, inspiring digital presence that provides the backbone for Tasmania's visitor experience

INTERNATIONAL

Deliver a global program that will build the Tasmania brand and encourage visitation to Tasmania



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Destination program

Visitor economy

Tasmania's long standing T21 partnership between government and industry provides the state with a strong advantage. It provides a platform for the development of strategy and a governance framework to monitor the implementation of priority actions to collectively achieve our vision and goals for the destination.

Tourism Tasmania will continue to lead and collaborate with the wider tourism ecosystem including regional tourism organisations (RTOs), other government agencies, peak industry associations and tourism operators to drive and deliver Tasmania's 2030 Visitor Economy Strategy and Three Year Action Plan.

We will progress our goal of being a leading sustainable travel destination through a focus on projects that support emissions reduction and circular economy practices across the tourism industry.

We will develop and implement a methodology and framework that supports the growth of the visitor economy to protect and enhance Tasmania's brand, environment and community values.

We will lead the planning and delivery of new and improved facilities and services to meet the increased visitation created by the new Spirits of Tasmania vessels.

Tourism Tasmania will continue to provide financial support to a number of organisations within Tasmania's visitor economy to support regional tourism, business and product development, and visitor services.

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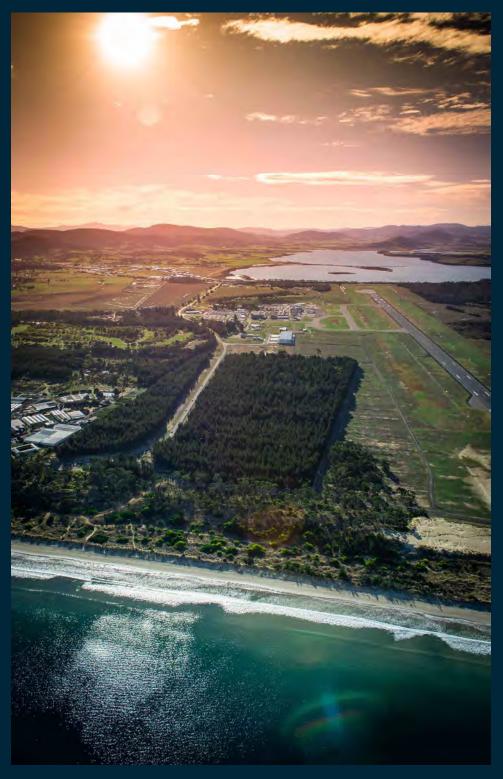
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Access and aviation

Ensuring visitors and Tasmanians can travel to and from the state with affordable and efficient flights and sea access remains a key priority of the agency.

We will continue to work closely with all access partners to maintain frequency and grow capacity on our core routes through strong advocacy and cooperative marketing activity to generate demand for services.

We will continue to work with key international airlines to build commercially sustainable direct international services into Tasmania from New Zealand and south east Asia to progress our 'one stop to the world' goal.



© Hobart Airport



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Engagement

Tourism Tasmania's program is achieved collaboratively, and our success is strengthened through our relationships with industry, community, government and visitor economy stakeholders.

We will increase opportunities for communication and meaningful engagement with the tourism industry and the wider tourism ecosystem.

We will share our research, insights, knowledge and resources to enable informed decision making and support the development of a productive and sustainable tourism sector.

Our commitment to Tasmania's Aboriginal people will continue to be progressed, and we will strive to build advocates for tourism across the community to ensure the benefits the visitor economy brings to Tasmania is valued and understood.

People

Our people are one of our greatest asset We will continue to deliver a positive employee experience and invest in our people.

We will attract the right talent and contin to develop a highly capable workforce, supported by effective leadership.

We provide a great culture that is collaborative, growth-oriented, grounde our values and aligned to our purpose.

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ts.	We will simplify our systems and processes to focus on the effective delivery of our programs.
iue	We will optimise our enterprise systems, utilise technology and mature our data strategy to drive efficiencies and performance.
d in	Our risk management approach will be refreshed, and our compliance and governance frameworks maintained, to meet our statutory obligations.
	We will maintain and strengthen our financial

performance, continue to drive cost efficiencies and work with government to ensure we have the funds to compete in an increasingly competitive environment.



Cradle Mountain and Dove Lake at night © Sean Scott Photography



wukalina Walk © Jillian Mundy



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2030 VISITOR **ECONOMY STRATEGY** STRATEGIC FOCUS

Research

Tourism Tasmania invests in a number of important research programs that inform both our marketing and destination programs.

We will continue to track our brand impact and evaluate campaign effectiveness; research emerging customer trends and deliver market insights; and track visitation through interstate, intrastate and international visitor surveys.

We will continue to progress bespoke research studies that support decision making across the tourism ecosystem including deep dives into domestic and international market analysis, visitor contribution and destination management models.



Tasmanian Mountain Bike Adventure © Stu Gibson



wukalina Walk © Jillian Mundy

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Tasmanian Visitor Survey at Hobart Airport © Sarajayne Lada



Cradle Mountain Visitor Centre © Sarajayne Lada



Tasmanian Visitor Survey postcard for online transition



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Risk management

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

Risk is owned by the Board of Tourism Tasmania with active oversight by the Audit and Risk Committee. Tourism Tasmania is reviewing and updating its risk management framework to adjust our risk threshold in relation to the criticality of certain issues to ensure that potential risks to the delivery of our program are recognised as early as possible.

Risks with which Tourism Tasmania engages fall into three distinct categories

- Strategic risks macro external risks which impact on strategy
- Enterprise-wide risks must be managed at a whole of organisation level
- Operational risks Al can be managed within functional responsibilities

The tourism sector nationally and globally is regularly impacted by economic factors including but not limited to, rising cost of living, exchange rate levels, availability of workforce and credit for investment, geopolitical instability, increased cost of business including insurance, and the impact significant environmental events and climate change.

Tourism Tasmania's operates within a highly competitive global market for holiday and leisure travel. Its ability to compete effectively is led by the organisation's focus on strategically building our unique brand, supported by a highly targeted marketing program and campaign activity to drive visitation to Tasmania across the year

Investing consistently in creative, different and memorable brand and marketing activities not only converts current demand, but importantly creates future demand for Tasmania and our tourism industry operators.

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A key risk identified by the board is financial and resourcing sustainability and agility with the significant reduction in the agency's appropriation in 2026-27 in the forward estimates, which will impact the agency's operations and strategic marketing investment. This is a high priority risk the organisation is working collaboratively with government to address.



Road into Queenstown © Jason Charles Hill



Waratah Lookout, Hartz Mountains National Park © Samuel Shelley



Bruny Island Neck Game Reserve © Scott Sporleder, Matador



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Statement of cash flows for the period ended 30 June

	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
	Actual	Budget	Budget	Estimate	Estimate
	\$,000	\$,000	\$,000	\$,000	\$,000
CASH FLOWS FROM OPERATING ACTIVITIES					
Payments					
Employee	(8,058)	(8,441)	(8,708)	(9,014)	(9,539)
Other (inc. Grants)	(35,196)	(32,933)	(30,023)	(29,694)	(21,560)
Receipts					
Govt appropriation ¹	40,084	37,745	38,015	37,990	30,379
Appropriation receipts - other	345	2,914			
Grants	2,736	0			
Other	708	715	716	718	720
Net cash from operating activities	619	0	0	0	0
Net increase/(decrease) cash	619	0	0	0	0
Payments for acquisition of non-financial assets					
Cash at beginning of period ¹	93	1	0	0	0
Cash at end of period	712	1	0	0	0



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Income statement for the period ended 30 June

Grant ² Other revenue Total revenue	8,409 708 49,546	0 715 41,374	716 38,731	718 38,708	720 31,099
EXPENSES					
Operating ²	43,050	41,231	38,587	38,487	30,906
Depreciation	22	460	534	510	480
Other	204	207	210	214	218
Total expenses	43,276	41,898	39,331	39,211	31,604
lotal expenses	43,276	41,898	39,331	39,211	31,604

1. The amounts for Revenue - Government Appropriation in 2024-25, 2025-26 and 2026-27 may be subject to change with the release of the 2024-25 State Budget.

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

	2022-2023 Actual \$,000	2023-2024 Budget \$,000	2024-2025 Budget \$,000	2025-2026 Estimate \$,000	2026-2027 Estimate \$,000
Financial assets					
Cash ¹	712	1	1	1	1
Receivables ¹	852	297	246	269	278
Total financial assets	1,564	298	247	270	279
Non-financial assets					
Plant and Equipment	223	168	68	45	21
Intangibles ²	0	1744	983	524	80
Other assets ¹	238	362	700	700	700
Total non-financial assets	461	2,274	1,751	1,269	801
TOTAL ASSETS	2,025	2,572	1,998	1,539	1,080
Liabilities					
Payables ¹	633	235	13	13	13
Employee Benefits ¹	1577	1659	1491	1535	1581
Other Liabilities ¹	10	10	9	9	9
Total liabilities	2,220	1,904	1,513	1,557	1,603
NET ASSETS (liabilities)	(195)	668	485	(18)	(523)
Equity					
Accumulated funds	(195)	668	485	(18)	(523)
TOTAL EQUITY	(195)	668	485	(18)	(523)

1. The variation in this item reflects revised estimates based on 30 June 2023 actuals.

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

STRATEGIC

OUR VALUES

OUR GUIDING GOALS

MARKETING PROGRAM

DESTINATION PROGRAM

ENGAGEMENT PEOPLE



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