

Understanding the opportunity to position Tasmania as a leading destination for climate- conscious travel

Qualitative Presentation

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1

Project background and research objectives



Via delivery of the 2030 Visitor Economy Strategy, Tasmania's vision is to be a leading destination for climate-conscious travel

The 2030 Strategy includes evaluating the value and viability of an opt-in Net Zero Visit program enabling visitors to calculate trip emissions and offset these by purchasing carbon offsets – with a preference for locally-based carbon offset programs

1



The **business objective** is to understand the value proposition of framing Tasmania as a unique destination, a low emissions and renewable energy leader – as well as providing positive impact travel options

2



The **research objective** is to qualitatively evaluate 3 concepts (carbon offsets, emission reductions, and environmental protection) to understand appeal, relevance, comprehension, distinctiveness, and credible branded association

3



A **further research objective** is to understand the perceived impact and added value on Tasmania's climate credentials, and whether travellers perceive this as offering Tasmania a competitive advantage in the tourism sector

Concepts for evaluation address 3 core themes

Note: A broader business objective is to identify the most compelling way of communicating Tasmania's renewable energy and climate action achievements – thus impacting adjacent work streams

Carbon offsets

- Trip carbon footprint calculator
- Carbon offsets (with a preference for Tasmanian-based offsets)
- Carbon footprints of typical trip itineraries
- Carbon offset packages of typical trip itineraries

Emission reduction

- Suggested low carbon footprint trip itineraries
- Low emissions travel options – including electric vehicle hire and charging locations, existing operator offerings e.g., Pennicott tours

Environmental protection

- Online portal/ one-stop-shop of landscape and marine conservation activities across Tasmania that visitors can contribute to via donations or direct participation, e.g., Landcare Tasmania's landscape restoration program, Tasmanian Land Conservancy, IMAS giant kelp reforestation project, Wildcare's Tasmanian Devil trapping activities

Overview of methodology and audience

Methodology

- 14 x 1.5-hour Concept Critique online focus groups
- Conducted w/c 6 May and with a stop and think then continued w/c 13 May 2024

Audience

- 3 priority segments (to be confirmed):
 - Positive Impact travellers
 - Conscious Adventurers
 - Discoverers
- Visited and not visited Tasmania before
- Mix of gender and age
- Geography: Metro and rural, Australia-wide
- Non-rejecters of Tasmania as a tourist destination
- Intend to travel for leisure in next 12-months



2 Executive summary



Key Findings | Tasmania has the credentials to deliver green travel initiatives meaningfully, though positioning and relevance will be key to success

There is a lot of distrust and cynicism when it comes to green initiatives

Green washing, over stating and lack of clarity in the category have created an environment where people are uncertain their support makes any difference

There are strong negative associations and a sense of helplessness

When it comes to travel sustainability is not top of mind

People are focused on fun and escapism, so the pessimistic view of climate concerns are not top-of-mind, and in some cases actively ignored

Sustainable destinations are not well known or understood

No one place holds strong associations as a sustainable destination. Tasmania has perceptions of being sustainable due to the clean air and lushness of the space – though climate credentials are not well known

When shared Tasmania's climate credentials impress

Tasmania's success is felt to be uplifting and positive – letting people know that change is possible, and targets are achievable

They provide Tasmania with authority and respect when it comes to initiatives and should be promoted

Net Zero Concepts had mixed influence, though all hold appeal

Trip planner is felt to deliver the most category meaningfully resonant idea – being fun, interesting and motivating

While the other concepts require optimising to drive greater engagement

In the context of TTAS proof points ideas have greater relevance

Proof points help reduce some of the cynicism connected with greener ideas and can ladder to Tasmanian experts and initiatives they know will work

Tone will be key to engaging people – travel is meant to be fun not a chore

Ensure any new initiatives are considered match the mindset of travellers. They are looking for light hearted, fun and memorable experiences that can elevate their travel moments

Language is also important to consider as people can feel overwhelmed and switch off

With so much confusion and distrust around climate ideas, there is a need to ensure any concepts are simple and easy to understand without jargon

3

Travel Considerations and Context





The purpose of travel is to remove yourself from day-to-day life, unwind, and be fully present in the moment

It is about escapism and delighting in the joy travel can bring to people's lives

Whether it is a short break, or a longer immersive experience, the focus is on enjoyment and moving away from the daily life challenges people face

There is a protectiveness around the need to have fun as people don't get to travel as much as they might like, and the planning and costs involved means people are determined to ensure they have a good time – and create meaningful memories

When it comes to destination decision making, the type of holiday people desire, who they are with, how long they have and what they can afford dominates



What they want from the holiday?

Relaxation, adventure, connection, experiences

These are all top-of-mind considerations when it comes to travel planning



Who are they going with?

Family, friends, or on their own

All parties play a role in determining the right destination based on their individual needs and the ability to ensure all have a good time

For families, kids needs are core to their decisions (age appropriate)



How long do they have?

Determines how far they can go – domestic or international

And what they can do while they are away – bigger adventures, smaller focussed experiences



What can they afford?

Growing concerns around financial crisis and rising cost of living is impacting people's ability to travel more

People are weighing up what is important, and adapting their travel plans to fit the changing economic climate

Covid created a sense of urgency around travel which is being tempered by financial concerns, so there are polarising trends around increased international and bucket list travel vs smaller and more frequent domestic driving holidays



Smaller domestic trips allow for regular nature-rich breaks

Exploring all Australia has to offer in smaller doses

People are opting to drive and go for shorter experiences, while also enjoying the journey to get there

Smaller domestic holidays can deliver to people's need for a break in a budget friendly way with a bigger focus on the nature/ scenery available

We tend to travel more, but also not necessarily fly. Will take more trips too, will drive to Melbourne, for instance...Once you're sort of in the car and you've got the music pumping, when it's just the two of you, it's kind of good (Travelled to Tasmania, 46-65)

International travel to popular and bucket list destinations

Inspired by social media and those around them, people are prioritising bucket list and overseas travel

Swapping smaller holidays for one (or two) bigger ones in the year – taking things more slowly, and experiencing all that the locations have to offer

There is a desire to do things while they can now the world is open again

As a trend sustainable elements did not come up as a consideration. When prompted there is mix association with the destinations associated with sustainability – no one owns this space, and it is yet to be clearly defined



Places of natural beauty

Places that are known to have beautiful vistas and lots of trees and space

New Zealand, Iceland, Tasmania are top of mind when thinking about destinations that deliver this



Places under threat

Where conservation is needed to preserve the environment for future generations

Uluru, The Great Barrier Reef, Venice and Antarctica are all examples of places that need support being preserved



Forward thinking destinations

Scandinavian countries that are known to be forward thinking and progressive are assumed to have more sustainable practices in place



Places that need help being more sustainable

The shadow side when prompted is places that need help being more sustainable – either through more ethical practices or funding and education

Places in Asia that are cruel to animals, or Africa where poverty prevents sustainability coming to the fore

A close-up photograph of a burlap sack filled with olives. The olives are mostly green, with some showing a purple hue, indicating they are in different stages of ripeness. Some olive leaves are also visible among the fruit. The sack is made of coarse, light-brown burlap. In the background, a large, gnarled tree trunk is visible, and a green net is draped over something, possibly another sack or a table. The scene is outdoors, with warm, golden light suggesting late afternoon or early morning.

4

Engagement with the
idea of sustainability in
travel

When people think about climate/ sustainability and travel, engagement comes down to whether the responsibility is on companies and government, or the individual





Connection to climate/ sustainable ideas in travel is not top of mind. A sense of guilt and helplessness deters people from engaging more with sustainable ideas when it comes to their leisure and fun time

Pessimistic views of the future and the sense the damage is irreversible makes this an uncomfortable conversation

People don't want to think about it when they are looking to escape from their day to day lives and unwind

Additionally, how sustainable ideas are often positioned makes some feel bad about traveling, further limiting appeal

*I think sustainable carries a bit of a guilt trip with it as well
(Discoverer, 46-65)*

You need to have a real vested interest in all this. My only purpose when booking a holiday is to have an experience and see the surroundings but certainly not really think about all that (Not travelled to Tasmania, 46-65)

Only makes us feel worse (Not travelled to Tasmania, 46-65)

Barriers to greater consideration of sustainability and climate consciousness in travel focus on the sense the responsibility is on individuals to drive change

There is consistency across all segments on the key barriers to greater consideration of climate friendly travel



It's too expensive

Perception choosing greener options is more expensive adding extra cost to their trip

This is a bone of contention for some who feel that companies and government should foot the bill



It's not easy to do

Emotionally feels hard to have to think about how to incorporate more sustainable practices into their trip

Adding more complexity to trip planning – they already have enough to think about



It's not my responsibility

Sense that one person will have little impact versus big companies

People feel that companies and governments should be leading from the front and onus should not be on individuals to make the change



It's not clear how this helps

Lack of transparency and simplicity in how actions are being used to help the environment

- Comprehension of carbon offset costs and how they are spent is low
- Low awareness of company waste policies



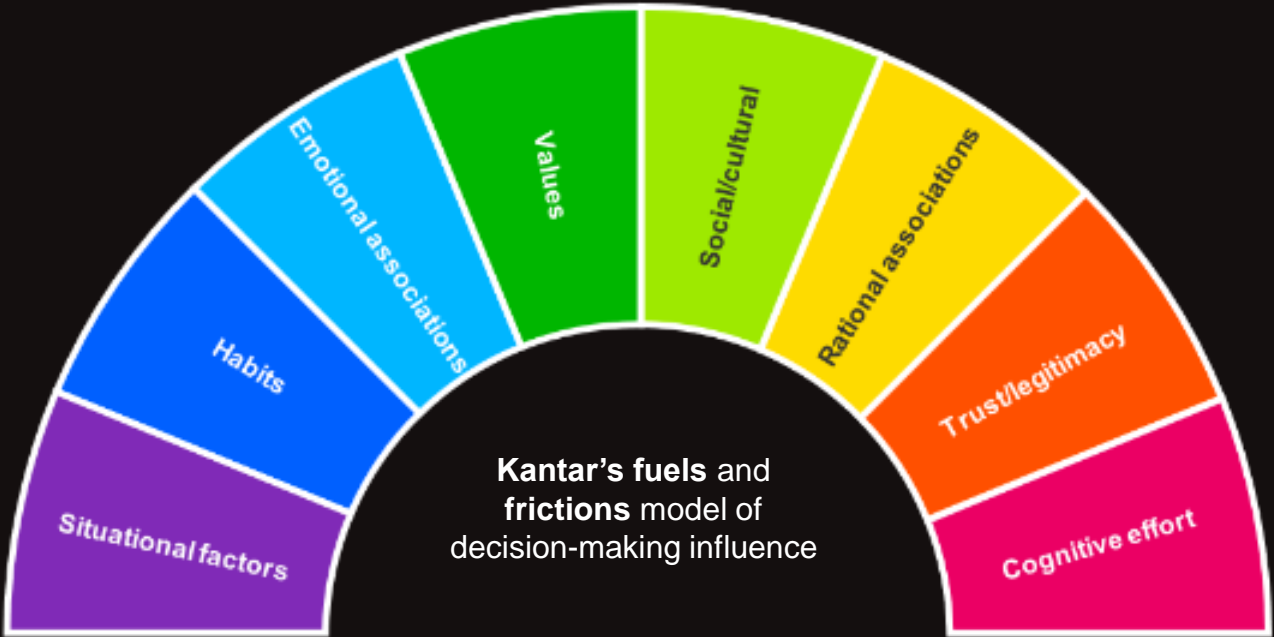
It's hard to know how to help

Lack of comprehension around what actions to take to make travel more sustainable and the positive impact those changes can have is limited

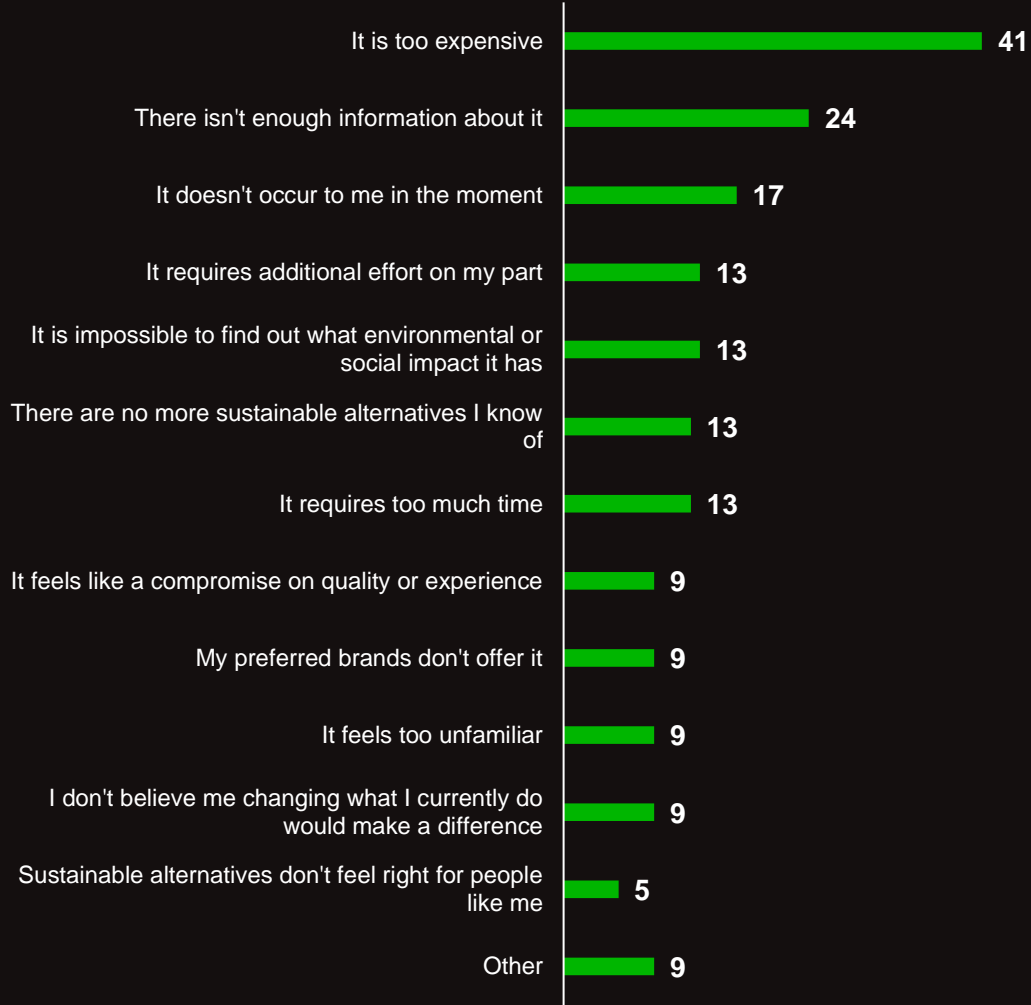
People are unsure where to start or what to do

Consumer tensions reflect the SSI 2023

Consumer frictions and these are key areas to focus on addressing



FRICTIONS



More climate conscious segments perceive themselves to already choose more sustainable options which align with their interests and ethos

However, similar to other travellers, it is not a top-of-mind consideration when they are thinking about travel planning

Conscious Adventurers have the greatest environmental consideration

Conscious of their impact is core to who they are, this inadvertently translates into their travel choices and interests

Hiking, biking, electric vehicles are part of their day-to-day decision-making, so they naturally lean into those types of experiences without thinking about it being the sustainable choice

They feel they already contribute daily and don't need to be reminded of this

Positive Impact Travelers have a greater focus on personal impact

A desire to connect with local communities and act for the betterment of the places they are travelling too

More likely to consider volunteering and actively seeking out experiences/ products that do not exploit local communities

Have an interest and openness to travel that supports those around them

Discoverers seek authentic local experiences – which by default are more sustainable

Part of their travel enjoyment is going off the beaten track and having non-mainstream experiences. This takes them to remote communities and lets them support locals while they are on the ground

They think of their personal impact and make decisions on what they can do that aligns with their desire to explore the area

Focussed on the experience and the adventure – betterment of the world is a benefit of the experience

There is a greater openness to thinking about sustainable travel however these groups are already engaging in more sustainable options which can limit their openness to ideas that are too obviously focussed in this way – similar to other groups they just want to think about their time off without this as a priority or focus. Positioning and communication style is key to cut through

Where companies have taken the lead and put sustainable ideas into practice it is appreciated, and people will choose sustainable options that align with their needs

A point of difference that can make people feel better about where they are staying or how they are getting there. People appreciate companies that put sustainable practices in place – so long as it doesn't negatively impact the travellers – through cost or experience

This works hardest when there is a clear link to the impact of choosing this option

Some acceptance of governments showing leadership e.g. pay a fee at the airport to help maintain facilities and natural sites

It's a way to kind of feel good about your travel and know that your travel isn't harming anybody. If I'm reading this is a nice restaurant and it's providing low food miles or it's helping the local economy, that's extra information that I would really like to know. (Travelled to Tasmania 25-45)



5

Connection with the idea
of Sustainability, Climate
Consciousness and
Positive Impact Travel



Perceptions of greenwashing have created an environment of distrust where language carries some baggage

The idea of *Positive Impact Travel* carries less emotional baggage as this term is not felt to be overused... yet



Positive impact travel can be seen as a benefit to the local community, environment, or to oneself

I think I automatically assume that wherever you're travelling is maybe giving back to the community or it's not having an impact if it's a local community that might be impacted by tourism negatively (Positive Impact Traveller, 25-45)



Sustainability in travel talks to efforts companies are taking to minimise environmental impacts and support local economy

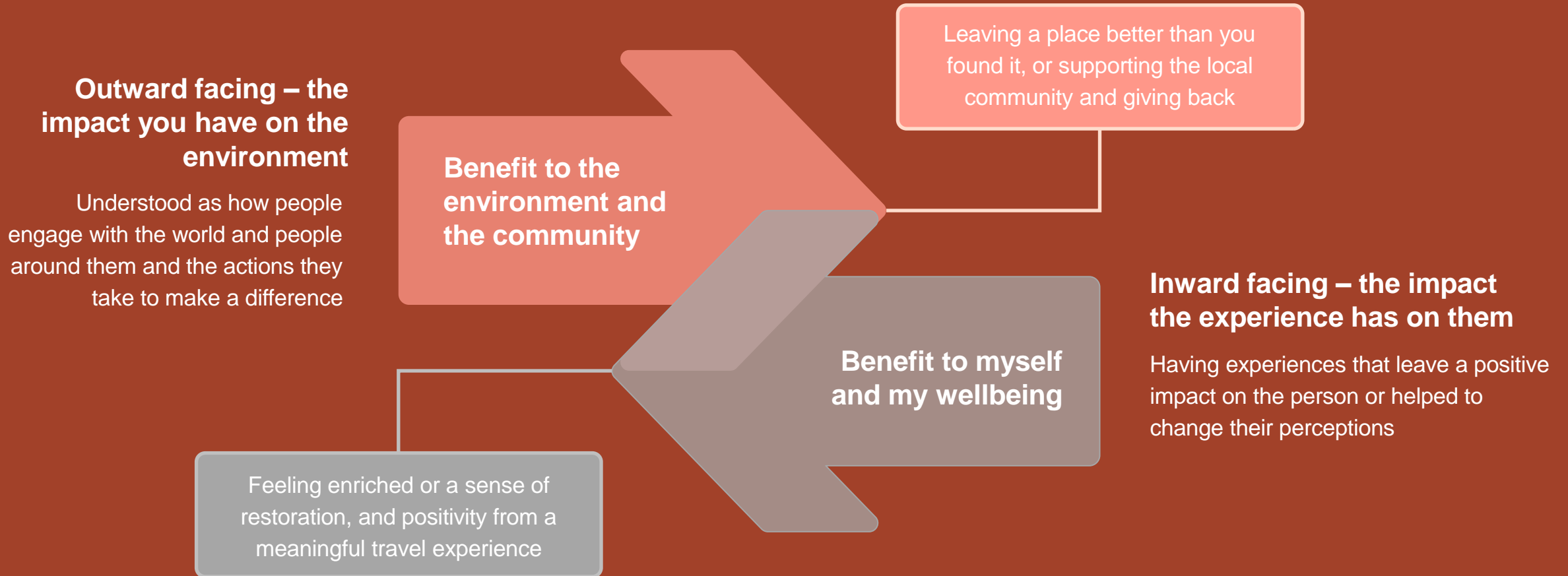
When you say sustainable, I think it deals with more to do with the three dimensions of sustainability when you look at environmental, social and the governance side of things (Conscious Adventurer, 25-45)



Climate conscious travel is the most confusing, stretching from impact climate is having on travel to damaging natural resources

It makes me feel more conscious of those aspects of carbon offsetting and things more immediately focused on the climate. Makes me think of pollution and waste reduced when you're travelling – (Discoverer 25-45)

Positive impact travel is felt to be a soft expression of the actions and positive impact travel has on people and the world around them, but can be interpreted in two ways



***Positive impact travel* is least associated with the environment, and is felt to have a more human meaning than ‘sustainability or climate conscious’**

Supporting local communities and business

Their presence and support through tourism feeds into the local economy

- Shopping locally
- Visiting farmers markets or local produce providers, wineries etc
- Steering away from heavy tourist experiences and seeking more local providers

Contribute to the local community while you're there and going to local shops and supporting local artists (Positive Impact Traveller, 25-45)

Personal satisfaction and rejuvenation

Unique and memorable experiences that contribute to personal well-being. This can be inward or outward

- Going to places for peace of mind and rejuvenation – a positive impact on your mental health and well being
- Volunteering or participating in local projects, contributing to important programs that directly impact where they are, creating a sense of satisfaction and feel good

Volunteer programmes, like helping communities and contributing something as you move through these places (Travelled to Tasmania, 25-45)

Being a considerate traveller

Ensuring you don't damage or negatively impact the people and environment around you while you are there

Minimising waste, carbon offsetting, staying in places that have eco-friendly practices

Taking your rubbish with you, which is what we do caravanning in national parks, not leaving an imprint, being totally self-reliant. (Discoverer, 46-65)



***Sustainability in travel* is more closely linked with businesses implementing sustainable practices in the travel category, and caring for the environment**

The phrase sustainability is felt to be easy to understand and ladders to making better choices for the environment

Green travel and sustainable accommodation efforts

Actions taken by companies to make travel more climate friendly such as green flights that reduce less emissions

Or efforts by hotels and accommodation providers to reduce waste such as; reusing towels and sheets, bigger bottles for shampoos and conditioner etc

Limiting the number of people that are in places rather than just looking for revenue... taking into account the footprint that the tourists are having on the location (Not travelled to Tasmania 46-65)

Emphasizing the importance of reducing carbon footprints

Utilising public transport, electric vehicles, not creating waste or wasting water

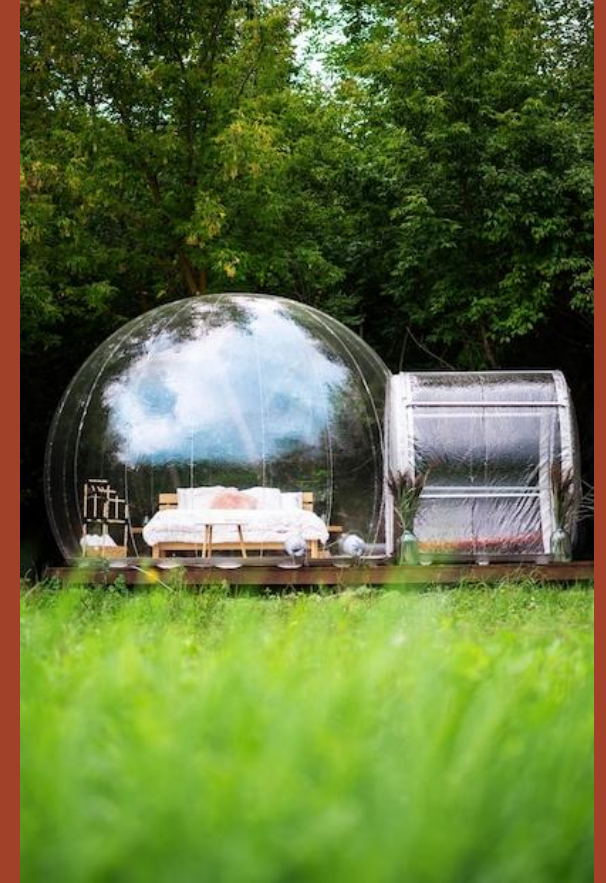
People can easily link sustainability in travel to taking actions

I don't want to be getting a coffee every morning and then using a non-reusable cup. So, I take a cup with me. Things I can do personally to reduce my footprint and be a little bit more sustainable (Discoverer, 25-45)

Reducing waste and leaving places better than when you arrived

Using reusable products, reducing single use plastics – both companies actively changing practices and people being conscious of what they are using when they travel

Maybe getting into like volunteer programmes, like helping communities so that you're actually contributing something as you move through these places rather than just spending money (Travelled to Tasmania, 25-45)





***Sustainability in travel* feels easy to understand, but the word sustainability feels overused, which risks people switching off when mentioned**

Understood to mean ongoing and long-term support of the environment. Of the three phrases mentioned *Sustainability in Travel* made the most sense as it is familiar and easily stretches to people, environment and policy

However, this feels like a buzz word that is being attached to everything – without tangible evidence – so people are quick to switch off or ignore it

Sustainable is a word that people throw around all the time now and it doesn't really hold much meaning anymore. I mean, it's got meaning, obviously, but positive impact sounds like something you can actually do. You can have a positive impact with. Sustainable is just another thing, you know? You know, do you shop in sustainable shops? Blah, blah, blah. It's everywhere. So, it's kind of just a word (Discoverer 46-65)

The idea of *Climate Conscious Travel* sits somewhere in between *Sustainable* and *Positive Impact*, but is not well understood

Climate Conscious is also perceived to be an overused buzz phrase that feels politically motivated

Mixed comprehension of what this means

A specific term that is a subset of Sustainable Travel – focussing primarily on climate change and pollution control

Associated with reducing carbon emissions and carbon footprint e.g. fuel emissions

My first thoughts was are you flying there in a plane? How is your transportation affecting the climate? What are your carbon emissions?
(Travelled to Tasmania 25-45)

Would that be just to try and stop the carbon footprint type thing (Not travelled to Tasmania, 25-45)

Associated with places under threat

Specifically destinations that are under threat from climate change e.g. glaciers melting, Venice sinking

Going to a place that's potentially susceptible to climate change... Maybe somewhere like what are some of the islands in the Pacific that maybe that are vulnerable to it (Positive Impact Travellers, 25-45)

Possibly something like zero carbon emission, things like that (Travelled to Tasmania, 46-65)

It can ladder to making personal positive choices

Actively making choices that are more environmentally friendly e.g. avoid long haul flights, electric vehicles

Using an EV or a battery-operated vehicle
(Positive Impact Travellers, 46-65 yrs)



Climate Conscious Travel is a term that feels politically charged and is expected to provoke some scepticism

A term that is linked to global issues and activism, and feels overwhelming

Expectations it may provoke a negative reaction from those who are not concerned about climate issues

Has a more serious and technical tonality than other terms and suggests a more global or significant impact

Seems overwhelming and beyond their personal control

Climate conscious, makes it more serious than if you say sustainability. I think that's upping it up. (Positive Impact Travellers, 46-65)

Climate probably feels more global to me, like bigger impact than the other statements (Travelled to Tasmania, 25-45)

6

Net zero concept evaluation – Overarching feedback



Concept stimulus | 3 x concepts evaluated

CONCEPT L - LOW EMISSIONS TRIP PLANNER

There are many ways to enjoy unique travel experiences in Tasmania while reducing travel emissions. A low emissions trip planner could help you design a bespoke low emissions holiday and reduce the impact of your travel, while contributing to the local economy.

Start by downloading the Destination Tasmania app or visiting the Destination Tasmania website to access a range of low emissions travel ideas such as editable itineraries:

- Unique low emissions travel itineraries with active transportation options such as a driving route that incorporates some of Tasmania's world class walking trails or cycling holidays along scenic cycling routes taking in some of Tasmania's best landscapes, restaurants and places to stay.
- Paddock-to-plate food experiences (low food miles). Create a holiday that takes in some of Tasmania's finest restaurants that source local ingredients and provide you with information on the food miles of your meals.
- Buying local products and services. The app could provide you with itineraries highlight some of Tasmania's best makers, local markets and food stalls
- Information around low emissions vehicle options including electric vehicle hire and charging stations

CONCEPT E - ENVIRONMENTAL PROTECTION

Nature, landscapes and seascapes are primary reasons visitors come to Tasmania.

Actively participating and learning about environmental conservation programs as part of your trip to Tasmania helps protect what makes it so special and offers a unique and memorable travel experience.

To help protect Tasmania's natural environment while on holiday, download the App or visit the website to participate in unique hands-on conservation activities, learn from scientists and ecologists about environmental conservation actions in Tasmania, or make a donation to an organisation of your choice.

Use the App to register your involvement in the program to unlock unique rewards e.g. educational material on environmental conservation and travel itineraries to visit the locations of the conservation projects you wish to support.

Examples of land-based conservation programs you could support or participate in include:

- Landcare Tasmania – run a range of projects that build resilient landscapes and increase biodiversity
- Tasmanian Land Conservancy – protect rare ecosystems by buying and managing private land in Tasmania
- Wildcare Tasmania – a community of volunteers who care for Tasmania's wild places and wildlife

Examples of marine-based conservation programs:

- The University of Tasmania's Giant Kelp Replantation Program – studying the restoration of Tasmania's iconic giant kelp forests.

CONCEPT V - VISITOR CARBON OFFSET PROGRAM

Tasmania is committed to maintaining its unique low greenhouse gas emissions status.

The global tourism industry accounts for 8% of global emissions. While there are ways to reduce travel emissions through choices and behaviours during travel, some are impossible to avoid e.g. flights.

Purchasing Tasmanian located and operated carbon offsets is one way to offset those emissions that cannot be avoided and reduce emissions while on holiday.

Download an App or visit a website, and using a carbon calculator, enter your trip details to get an estimation of your carbon footprint.

This App will allow you to offset your trip emissions by purchasing carbon offsets from Tasmanian-based programs, or support tree plantings in Tasmania-based reforestation projects.

Example:

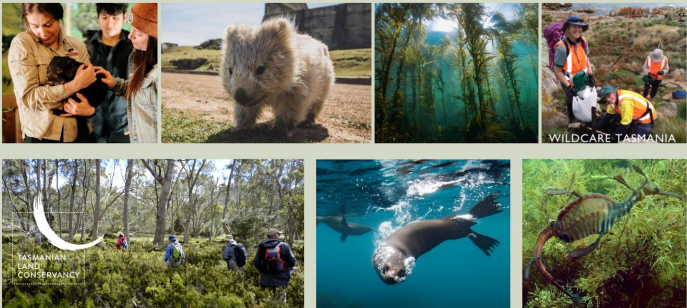
Local land restoration: Support Landcare Tasmania's Coal River Valley Project which has increased biodiversity and agriculture production by planting 8,000 trees.

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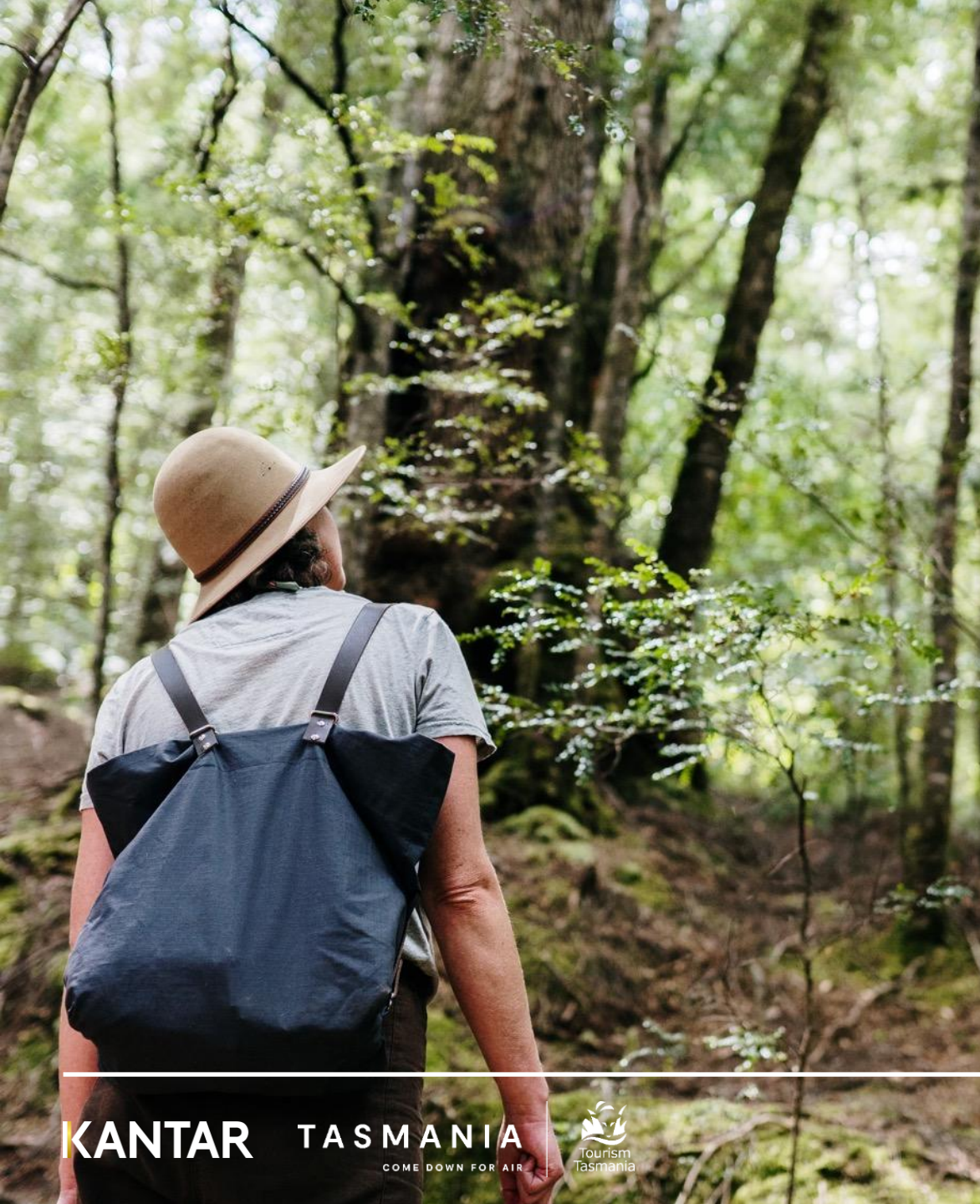


CONCEPT E - ENVIRONMENTAL PROTECTION



CONCEPT V - VISITOR CARBON OFFSET PROGRAM





At a high-level people would like the opportunity to engage in options that are better environmentally, but this should be an adjunct to their holiday and not a reason to go

It prompted openness to more sustainable ideas, however there is a clear value action gap with people post-rationalising decision-making to make themselves sound more environmentally conscious than they are

When faced with trade-offs for time, enjoyment and money, it becomes clear sustainable ideas are less appealing in the travel context

I feel bad saying this, but it is not something I consider when thinking about travel. If it was there in front of me and matched what I am doing, then yes, I will choose it, but it is not the main decision I am making (Travelled to Tasmania, 25-45)

All options have potential to impact and influence positive behaviour change, but optimisations are needed to ensure they cut through and are considered

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Local land restoration: Support Landcare Tasmania's Coal River Valley Project which has increased biodiversity and agriculture production by planting 8,000 trees.

Via the App, you could register in the program to unlock unique individual rewards. This could include travel itineraries to visit the locations of your carbon offset or the reforestation project you choose to support.

Trip planner highlights fun, engaging experiences in Tasmania that happen to be low emission

Motivating people to visit and capitalising on the unique and interesting things they can do while visiting

However, low emissions is not felt to be core to the success of this concept

Environmental protection implies potential for action and education, but positioning is key

A more niche idea that enables people to have a fun and meaningful experience while they are away

Language, tone and positioning needs to be considered as this concept risks feeling negative and pushy if not communicated clearly

A visitor carbon offset plan carries baggage. More detail and context is needed to help this idea resonate

Strong connection to airlines and cynicism around how money is used

Calculator and connection to Tasmanian specific offset programs is differentiated though functional elements require greater clarity for this idea to hold more appeal

Consideration around language | Language and concepts around sustainability are not easily understood. Simplicity and clarity is desired for any new concept to ensure people can quickly and easily understand what the idea is conveying



Low emissions overall are not understood, creating a disconnect

People do not understand how emissions are measured and what the overall impact is of reducing those

Without a benchmark the idea feels intangible and can drive further scepticism

Environmental protection feels intense, and connected to activism

Language that comes across too strongly can also be off-putting – talking about conservation and protection can feel like phrases for people who care deeply about these ideas and will take strong actions for them – this doesn't align with the general public view

Carbon offset is known, but feels intangible and untrusted

Similar to low emissions there is not broad understanding around what carbon offsetting is, how it works and what the impact is

There is a need for greater education into these ideas before people can truly connect with them. Any new concepts should consider the language and positioning to make them feel less daunting and serious as this will help people overcome feeling overwhelmed and disconnected

A note on tone | As concepts relate to experiences and considerations during travel, it is important tone matches mindset – ensure concepts feel fun and light-hearted

Ideas that spark inspiration and enjoyment engage

All concepts offered some element of interest or fun

Elevation of these will be critical to connecting with travellers as that is why they are holidaying

Consider how to frame sustainable elements softly around the experience and exploration of Tasmania

It did sound very much like a school trip, educational... It wasn't fun. And that's what a holiday is, fun (Discoverers, 46-65)

Balance knowledge and education with fun

Education is not the primary focus of travel, though combining education with fun provides a unique and memorable experience

Integrating educational content into an enjoyable and engaging activity helps to maintain interest and enhance the overall travel experience

The actively participating is something you could do, if there was a family friendly option... this is what we're doing for the animals and learning from the scientists and seeing... It probably wouldn't be something that I would base the whole holiday around (Travelled to Tasmania, 25-45)

Information vs lecture – positioning is key

Content should be presented in an engaging manner

Avoiding overly technical terms and lengthy lectures in favour of clear and accessible information

Participating in activities and learning from local guides are more appealing than passive learning

It becomes an educational sort of thing... are we going for holidays or are we are going on a tour or some sort of community service? (Not travelled to Tasmania, 46-65)



Rewards in the concepts confuse, and creates the belief if they are engaging with sustainable ideas they should be rewarded

Confusion about the nature and value of rewards

Uncertain how they are accrued and assume that people need to take actions to get them

Need for more clarity on what the rewards entail

The featured rewards were not especially motivating – itineraries appeal but seen as a bonus rather than a reward

I don't understand whether it's saying that I'm going to win a trip to the location or whether it's just like, yeah, I'm not quite sure what it's offering as a reward (Discoverer, 25-45)

Unlocking unique rewards is an appealing initiative

They are looking for more unique rewards and incentives to be included e.g. having their name associated with an animal donation.

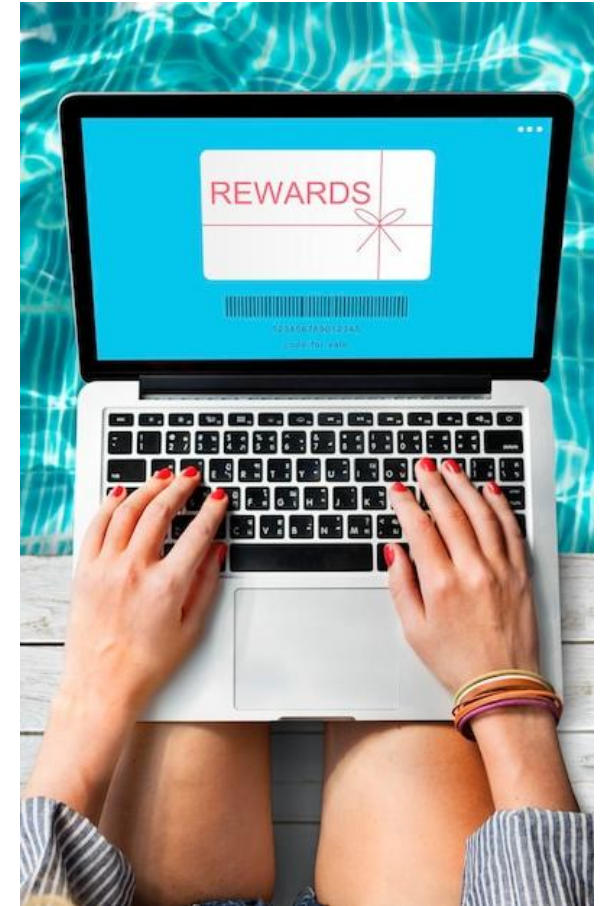
This has potential to encourage them to download the app

Maybe something like if it's planting trees, having your name on a plaque with other people that have contributed, or you have an animal... that you've donated to that... your name goes beside it or something like that (Travelled to Tasmania, 25-45)

But rewards risks an incentive mindset

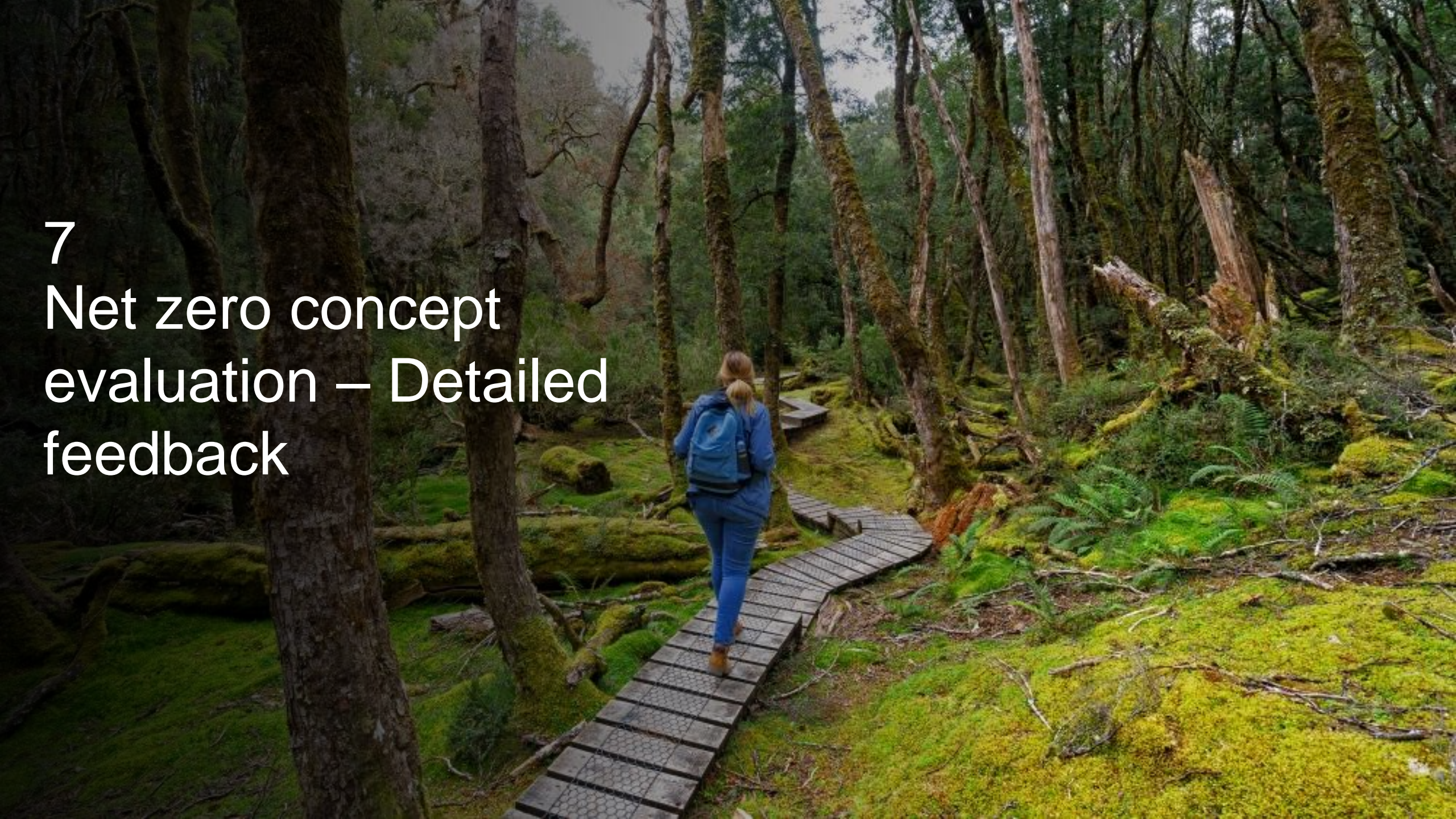
Prompts them to suggest that they should be rewarded for making sustainable choices e.g. via discounts or preferential rates (a win: win situation) rather than wanting to engage to support the environment

It has a similar feel to Qantas green tier rewards. there's some sort of incentive at the end to build into getting casual people like me to do this. That's going to be through costs or some sort of individual personalised reward. A travel itinerary is not going to get me to commit (Travelled to Tasmania 25-45)



7

Net zero concept evaluation – Detailed feedback



Concept L | Low Emissions Trip Planner

CONCEPT L - LOW EMISSIONS TRIP PLANNER

There are many ways to enjoy unique travel experiences in Tasmania while reducing travel emissions. A low emissions trip planner could help you design a bespoke low emissions holiday and reduce the impact of your travel, while contributing to the local economy.

Start by downloading the Destination Tasmania app or visiting the Destination Tasmania website to access a range of low emissions travel ideas such as editable itineraries:

- Unique low emissions travel itineraries with active transportation options such as a driving route that incorporates some of Tasmania's world class walking trails or cycling holidays along scenic cycling routes taking in some of Tasmania's best landscapes, restaurants and places to stay.
- Paddock-to-plate food experiences (low food miles). Create a holiday that takes in some of Tasmania's finest restaurants that source local ingredients and provide you with information on the food miles of your meals.
- Buying local products and services. The app could provide you with itineraries highlight some of Tasmania's best makers, local markets and food stalls
- Information around low emissions vehicle options including electric vehicle hire and charging stations

CONCEPT L - LOW EMISSIONS TRIP PLANNER



The low emissions trip planner delivers positive and actionable advice on how to make 'better' environmental choices, without taking away from the holiday

Overcoming pain points around not knowing how to have more sustainable travel and accessible ways to make a difference



Inspiration that's also conscious

Showcasing interesting options that Tasmania has on offer...with the added benefit of supporting the environment



Easy to see how it is more sustainable

Examples are clear providing simple ways to have a more sustainable holiday – reducing some of the associated guilt



A positive spin on sustainability

Highlights that making sustainable choices can be fun through experiences and small changes



Simple to incorporate into their trip

Includes ideas and activities they would like to do while travelling in Tasmania

Features great things to do in Tasmania and allows people to have a more authentic trip

The concept was easiest to understand and felt most relevant to travel generally.

Highlighting that a low emissions holiday is easy

Trip planner with itineraries sounds simple

Inspiration and options for people to explore while they are travelling to Tasmania – simplifying the planning process

Highlights there is a lot to do in Tasmania

Different interesting options engage, and for those who have not been there the options sound fun and aspirational



Low emissions ideas fit with perceptions of Tasmania

Cycling, Hiking, Paddock-to-plate are already linked expectations for a Tasmanian holiday

People expect those experiences and are happy to have a 'better for the environment' message validating their choices

Makes it easy to have a low emissions holiday

Integrating with existing travel plans without require significant effort or thought from the travelers

Examples used tell a clear narrative of what people can expect and how these options can be added to their trip



Educational and informative

Teaches people what they need to do to be more sustainable – simply

Highlights small changes can have a big impact

This has less appeal for more knowledgeable travellers



Versatile and customisable

Selections are made based on preferences and 'bespoke' means people can tailor it to their needs – engaging in as many ideas as they like

Potential to enhance the travel experience



Local economy support appeals

Inclusion of local providers has dual benefits – reducing footprint and supporting local economy

Creates twice the 'feel good' impact



Examples are broad and engaging

Implies there is more to do, and something for everyone

This motivates people at the least to 'have a look'



Practical elements are appreciated

Inclusion of different modes of transport combined with fun elements makes this feel practical and user friendly

The focus on low emissions and elevation of the app as the delivery mechanism can negatively impact consideration, making the concept feel niche

There are many ways to enjoy unique travel experiences in Tasmania while reducing travel emissions. A low emissions trip planner could help you design a bespoke low emissions holiday and reduce the impact of your travel, while contributing to the local economy.

Start by downloading the Destination Tasmania app or visiting the Destination Tasmania website to access a range of low emissions travel ideas such as editable itineraries:

Having a low emissions holiday is not motivating

It is not what people are actively seeking – this is an added benefit but will not impact them doing what they would like to do anyway

Calling it low emissions risks it feeling too niche for the general population and implies that this is not an overall trip planner

Consider naming and positioning of this idea to ensure it feels broadly relevant

Green suggestions and options preferred

People like the idea of greener options and highlighted suggestions as an adjunct to their current trip planner tools and sites

It feels like a more subtle way to highlight better options without making it the focus

Is there an opportunity to signpost better options rather than making them the main focus?

The idea of an app for this can act as a barrier

Without a clear ongoing role there is pushback on using the app solely for this purpose

Ongoing relevance or in the moment use is needed to encourage people more to consider the app

Opportunity to create a clearer role for the app and consider features to improve relevance

Other barriers to consideration centre around credibility, cost and user experience

Some cynicism around how impactful this idea will be

Suggestions around itineraries where you have to drive anyway feels at odds with the idea of low emissions

Without clarity around how different your trip emissions will be by making these changes some question the credibility

I am not sure how me driving somewhere to go cycling is going to be low emissions. I am still going to be driving to get around (Travelled to Tasmania 46-65)

Higher cost associations can make people wary

Concern low emission options may be more expensive as there are strong cost associations with climate friendly options

Where options are more expensive this may prove to be a barrier

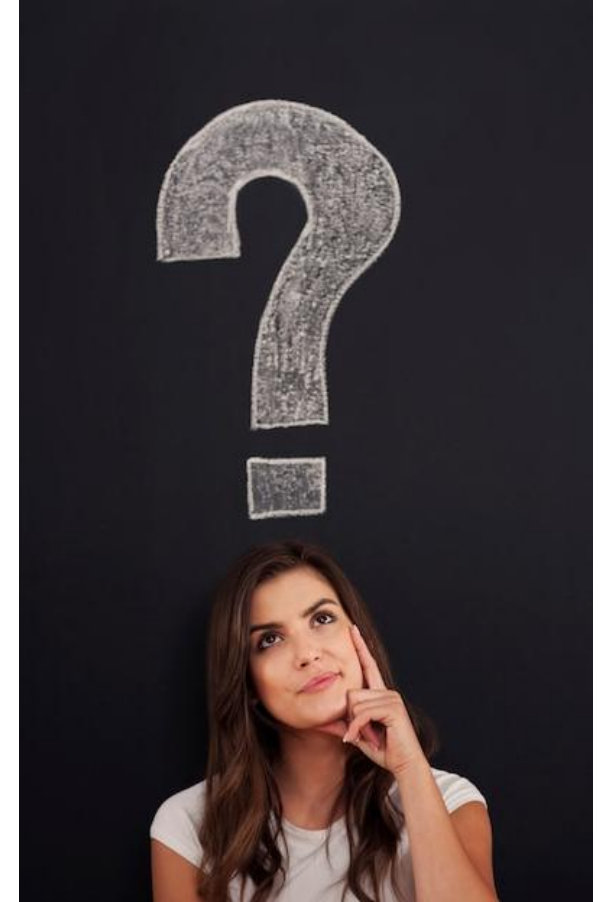
I like the idea, but there are other things like is it going to cost more to choose something like accommodation of restaurants that are more sustainable. I have to factor that in as well (Not Travelled to Tasmania 25-45)

Perceptions of complexity need to be overcome

Perception that significant effort is needed to design a low emissions trip can be a deterrent

Expectation that this would only support planning part of the trip and that other resources would be needed for comparison and search detracts from the simplicity of the idea and may discourage use

Does this then add another thing I have to check when I am planning? Could I upload my trip into it or connect it to something else I am using? It sounds like it could be a bit of a hassle (Discoverers 46-65))



Concept E | Environmental Protection

CONCEPT E - ENVIRONMENTAL PROTECTION

Nature, landscapes and seascapes are primary reasons visitors come to Tasmania.

Actively participating and learning about environmental conservation programs as part of your trip to Tasmania helps protect what makes it so special and offers a unique and memorable travel experience.

To help protect Tasmania's natural environment while on holiday, download the App or visit the website to participate in unique hands-on conservation activities, learn from scientists and ecologists about environmental conservation actions in Tasmania, or [make a donation](#) to an organisation of your choice.

Use the App to register your involvement in the program to unlock unique rewards e.g. educational material on environmental conservation and travel itineraries to visit the locations of the conservation projects you wish to support.

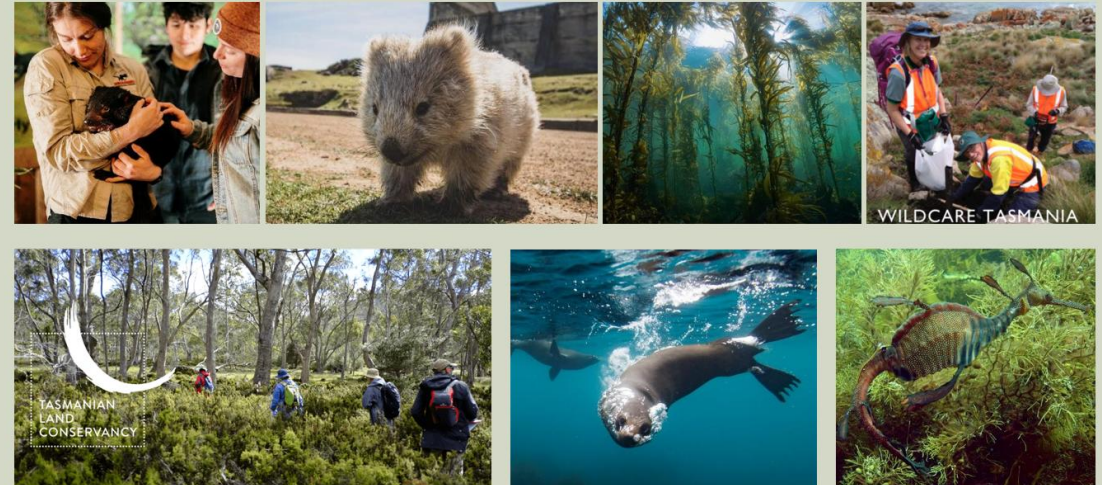
Examples of land-based conservation programs you could support or participate in include:

- Landcare Tasmania – run a range of projects that build resilient landscapes and increase biodiversity
- Tasmanian Land Conservancy – protect rare ecosystems by buying and managing private land in Tasmania
- Wildcare Tasmania – a community of volunteers who care for Tasmania's wild places and wildlife

Examples of marine-based conservation programs:

- The University of Tasmania's Giant Kelp Reforestation Program – studying the restoration of Tasmania's iconic giant kelp forests.

CONCEPT E - ENVIRONMENTAL PROTECTION



The *Environmental Protection* concept polarises depending on interpretation and engagement with conservation and sustainability

More clarity is needed on what this idea entails to help people consider whether this is right for them



Engaging when seen as an opportunity to get involved with something fun that is also meaningful

Getting involved with local environmental programs holds some appeal and is felt to be a unique option to be included as part of a holiday

Something interesting and active to talk about that is not touristy

A chance to connect with locals and have a more authentic experience



When interpreted as hard work that is not conducive to a holiday feel, it can reinforce feelings of guilt

When perceived as pushy or preachy this idea lacks resonance. As presented the idea feels like work, and the idea of coming and 'working' on holidays has limited appeal

Language around education has come through too strongly which adds to the sense this is more serious than people would like on their holiday

The right positioning and communication of this idea will be paramount to its success. Highlighting choices and options available will enable broader appeal

The opportunity to immerse in a community project for a short time and see the impact first-hand is appealing and perceived as distinctive

A unique and memorable edition to their holiday

Potential to engage with different and meaningful programs while away entices

Doing something out of the ordinary that also makes a difference is a nice addition to a trip away

Active involvement and opportunity to learn

Learn from locals and experts about the area, the projects they are working on and why they are important



Seeing impact first-hand adds credibility

Participation means that people can see where donations are going and the impact their support and these programs have directly

Diversity of projects implies choice

People want to do something they are interested in as this is their holiday

Diversity of projects in the concept implies there will be something for all

Visuals and focus on animals in the imagery helps drive interest for this idea, as the concept of engaging with wildlife conservation programs holds broader appeal

CONCEPT E - ENVIRONMENTAL PROTECTION



Ability to see wildlife and participate in their conservation excites

Broadly appealing for individuals and families – seeing the wildlife is something people are likely to do while in Tasmania, the addition of supporting their programs adds an extra layer of interest

Wildlife activities feel more fun

Assumption that hands on involvement will have the potential for something simpler and that allows people to be near wildlife more than if they were just visiting a zoo

Some assumption that this involvement will be less time consuming as well – adding less distraction to their holiday

I would love to get involved with the animals and help out there. My daughter and I would really enjoy something like that (Positive Impact Traveller 46-65)

When you see the animals, yeah definitely it is something that you want to support. So I would be interested to see what was on offer (Discoverer 25-45)

This idea has the potential to be most resonant for families and environmentally minded travellers, while Discoverers like the idea of local community engagement



Teaching moments and memorable experiences with kids

Parents could see a role in participating in activities that are kid friendly to make meaningful memories

Adding soft teaching moments that are fun and educational



Environmentally minded welcome the opportunity to get involved

Those with an interest in active holidays and environmental programs liked the potential to easily seek out places and ways to get involved

This concept fits with their ethos and would be a welcome addition to their time away



Discoverers would like the opportunity to connect with locals

Engaging with and learning from people on the ground holds appeal for Discoverers who like an active adventure that feels authentic

Experiences such as this have potential to tap into their desire to explore and get off the beaten track

Lack of clarity on what involvement looks like, and the heavy focus on education limits the overall connection with this idea

Actively participating and learning about environmental conservation programs as part of your trip to Tasmania helps protect what makes it so special and offers a unique and memorable travel experience.

To help protect Tasmania's natural environment while on holiday, download the App or visit the website to participate in unique hands-on conservation activities, **learn from scientists and ecologists about environmental conservation actions in Tasmania, or make a donation to an organisation of your choice.**

Use the App to register your involvement in the program to unlock unique rewards e.g. **educational material on environmental conservation** and travel itineraries to visit the locations of the conservation projects you wish to support.

Education is interesting but only part of the story

There is value and appeal in becoming educated on programs and the impact they have, but the education part of it needs to sit behind the enjoyment of participating

Heavy focus in the concept description moved this idea more towards a school or university program which is incongruent with the idea of leisure travel

Consider how to frame the role of education to ensure people feel don't feel this will be schooling

I don't have enough information in what's presented here to make a decision. It says directly supporting or actively participating in environmental conservation programs. And it did kind of give us a few examples but, of companies, not what you would be doing (Discoverer, 25-45)

Examples given are perceived as hard work

Perception this could be free manual labour which does not appeal to many while on holiday

Greater clarity is needed on what sorts of activities could be done so people can choose what would be right/ realistic for them

Getting the balance of experiences right will be key to engaging multiple audiences and highlighting choice

Highlighting options and choice may help

Lack of clarity around how long engagement would be also limits persuasion of this idea

Desire for multiple options to help them choose something that is relevant for their trip e.g;

- Time needed – 1 hour or days
- Cost range to get involved (and ideally how it supports the cause)
- Rating on who can participate; kids, elderly, accessibility
- Location – does it fit in with their travel plans and needs?

Consider how to include this information so people have a better sense of what is on offer

Concept V | Visitor Carbon Offset Program

CONCEPT V - VISITOR CARBON OFFSET PROGRAM

Tasmania is committed to maintaining its unique low greenhouse gas emissions status.

The global tourism industry accounts for 8% of global emissions. While there are ways to reduce travel emissions through choices and behaviours during travel, some are impossible to avoid e.g. flights.

Purchasing Tasmanian located and operated carbon offsets is one way to offset those emissions that cannot be avoided and reduce emissions while on holiday.

Download an App or visit a website, and using a carbon calculator, enter your trip details to get an estimation of your carbon footprint.

This App will allow you to offset your trip emissions by purchasing carbon offsets from Tasmanian-based programs, or support tree plantings in Tasmania-based reforestation projects.

Example:

Local land restoration: Support Landcare Tasmania's Coal River Valley Project which has increased biodiversity and agriculture production by planting 8,000 trees.

Via the App, you could register in the program to unlock unique individual rewards. This could include travel itineraries to visit the locations of your carbon offset or the reforestation project you choose to support.

CONCEPT V - VISITOR CARBON OFFSET PROGRAM



High scepticism around the idea of a visitor offset program, though connection to Tasmania and the idea of the calculator differentiates

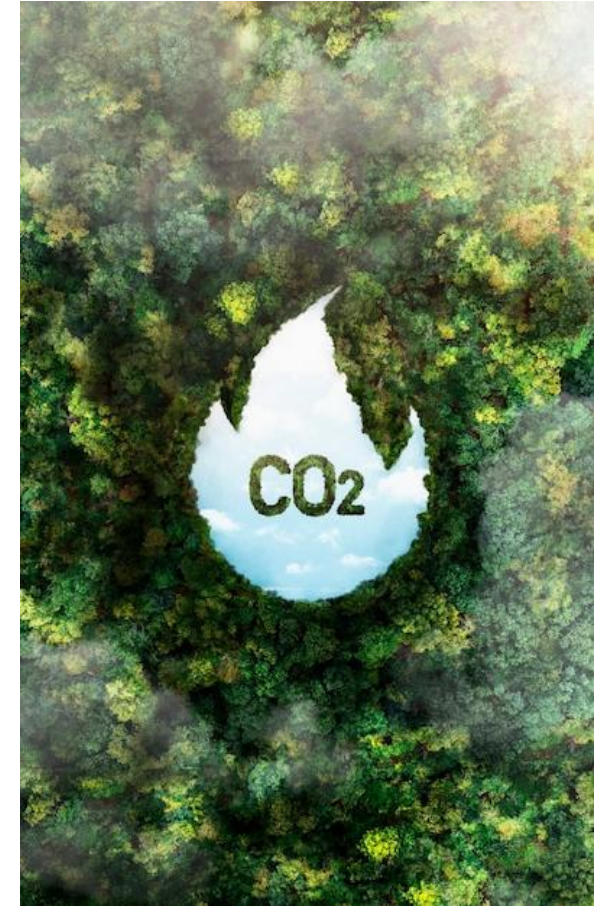
Airlines top-of-mind connection to carbon offset programs create initial distrust. People are uncertain how their money is being spent and so initially disconnect

However, the connection to Tasmanian based programs and the ability to see how money is being spent aids comprehension and makes this idea a little more appealing

Providing tangible evidence of programs and locations adds credibility to the concept

Being able to calculate carbon emissions holds appeal for those who want to know the environmental impact of their trip

I really like the idea of being able to perhaps purchase trees or it's something that's quite tangible and you know that you can actually think, oh, well, I bought a tree and it's something that's really going to live long after you and hopefully create an environment for like the local wildlife, etcetera (Positive Impact Traveller, 25-45)



The idea of the calculator and connection to Tasmanian projects gives this idea niche appeal. Simplification is key to potentially improving consideration



CONCEPT V - VISITOR CARBON OFFSET PROGRAM

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Tasmanian based programs add credibility

Reassures people as they can check to see where their money is going. Programs are named and people can look them up if they want to

Ability to visit locations aids trust

Ability to receive details on program locations adds an extra layer of conviction to the concept, people can physically go there. This feels transparent

Calculating emissions could be educational

For those interested in understanding more about how their actions impact emissions the calculator provides an opportunity to understand more around how emissions are calculated – this feels transparent, while also educating

With the existing carbon offset negative associations, clarity will be essential to overcoming barriers. More persuasive proof points are needed to encourage reappraisal

The global tourism industry accounts for 8% of global emissions. While there are ways to reduce travel emissions through choices and behaviours during travel, **some are impossible to avoid e.g. flights.**

Purchasing Tasmanian located and operated carbon offsets is one way to offset those emissions that cannot be avoided and reduce emissions while on holiday. Download an App or visit a website, and using a carbon calculator, **enter your trip details to get an estimation of your carbon footprint.**

This App will allow you to offset your trip emissions by purchasing carbon offsets from Tasmanian-based programs, or support tree plantings in Tasmania-based reforestation projects.

8% of global emissions is not overly impactful

Feels relatively small in the scheme of things

Prompts people to then examine their percentage impact within that 8% - this is potentially un motivating

I just feel like if 8% is the travel tourism industry as a whole. Yeah. It would be 0.001% for my four day trip to Tassie (Not travelled to Tasmania, 25-45)

Calling out flights undermines persuasion

Positions flying as the biggest issue – in which case they will offset their flights only, reducing the value of this idea

Confusion around calculator usability

Do they need to calculate every day and component of their trip separately?

How laborious is it to calculate?

How will they know whether their trip will be low/high emissions when they do not understand the benchmark – is everything over zero bad?

Perceptions offsets will then be high once they have added it all in

8

Impact and reaction to Tasmania proof points



Stimulus | Tasmania proof points

- Tasmania is the first Australian state, and one of few places globally, to achieve 100 per cent renewable electricity generation, through building renewable energy projects State-wide including hydro and wind power.
- Tasmania makes enough clean power to meet all of its current electricity needs.
- Tasmania legislated a target to double renewable energy production and reach 200 per cent of current electricity needs by 2040.
- By 2040, Tasmania will generate enough renewable power to share with mainland Australia, moving the entire nation to a cleaner future.
- Tasmania is the first Australian state, and one of few places globally, to achieve net zero greenhouse gas emissions, and has maintained that status for the last 9 years.
- Tasmania maintains one of the world's largest carbon sinks in its forests.
- Committed to keeping emissions low, Tasmania has legislated a target to maintain net zero emissions, or lower, from 2030.

There is limited awareness of Tasmania's climate and sustainability credentials

When proof points are shared there is an overall sense of pride, awe, and hopefulness that comes from seeing an Australian State succeed in an area that is filled with politics and negativity

It's news to me. I think more publicity about this should be shared and that they've done it as a small state to be able to do that. So, I guess this should give incentive for the other states to try and achieve that too (Travelled to Tasmania, 25-45)



Proof points are newsworthy, demonstrate Tasmania's commitment to sustainable practices, and highlights knowledge and leadership in this space



Shows people it can be done

Provides hope in all the doom and gloom messaging that climate goals can be achieved, and people can make a difference



Positions Tassie as a world leader

Quietly leading through example and success



Highlights expertise

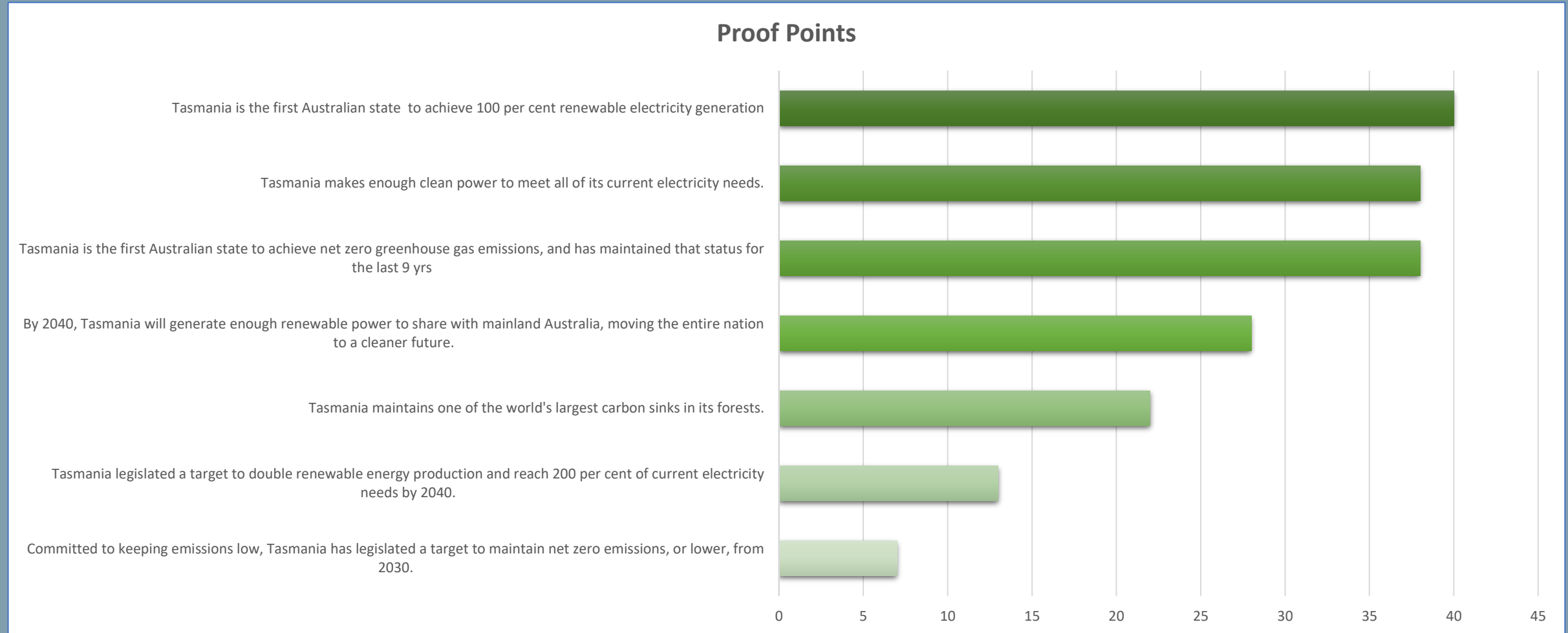
Tasmanian experts and climate professionals know what they are doing, and their initiatives are working



Motivates people to support the initiatives

People don't want to be responsible for negatively impacting the environment – they feel a sense of responsibility to align with sustainable ideas while visiting

Tasmania proof points | The most persuasive proof points highlight what has already been achieved driving credibility, and can be a source of pride for all Australians



Most impactful proof points are easy to understand and celebrate what Tasmania has already accomplished, as is the first Australian State to achieve significant goals

Tasmania is the first Australian state to achieve 100 per cent renewable electricity generation

Simple and easy to understand

A credible and significant achievement that positions Tasmania as a leader in renewable energy

Calling out the 'first state' is impressive as Tasmania is a small state that has surpassed the rest of Australia

Seen as a unique selling point that highlights their commitment

More compelling and inspiring than the future *potential* goals

Tasmania makes enough clean power to meet all its current electricity needs

A significant achievement and a sustainability milestone

A blueprint for mainland Australia who should be following their lead – and move away from coal and gas

Some justification that the low population and ample water and wind supply makes this a possibility for Tasmania – unlike the rest of Australia

Tasmania is the first Australian state to achieve net zero greenhouse gas emissions, and has maintained that status for the last 9yrs

Net Zero greenhouse gas emissions sounds important, but not all know what that means

Those who understand this finds it remarkable and impressive that Tasmania is one of the few places globally capable of achieving this milestone

Makes Tasmanian actions and policies sound 'world class'

Leading the way for others to follow

A demonstration that Tasmania is "punching above its weight" on the global stage

Less impactful proof points have mixed comprehension, and refer to legislated targets which feel politically motivated and may never be realised

By 2040, Tasmania will generate enough renewable power to share with mainland Aus, moving the entire nation to a cleaner future

A surprising and very cool idea that a small state can give back to the rest of Australia – building a better future for all

Potential for Tasmania's efforts to offset some of the negative environmental impacts of other states

Though still a future focussed idea rather than tangible achievement

Tasmania maintains one of the world's largest carbon sinks in its forests

Linked to the cleaner air in Tasmania

Role and relevance of a carbon sink is not widely understood

Some aware of recent deforestation programs which undermines impact

Tasmania legislated a target to double renewable energy production and reach 200 per cent of current electricity needs by 2040

Language is more complex

Future-oriented statements can prompt scepticism, with many preferring to hear about actual achievements rather than projections

Often associated with political lobbying

Committed to keeping emissions low, Tasmania has legislated a target to maintain net zero emissions, or lower, from 2030

Unclear meaning – 'from 2030'

Some have confidence given current achievements

As before future plans make them "roll their eyes" because they hear similar promises frequently and doubt their realization

In the context of the concepts, Tasmania's credentials add relevance and authority to the focus on more sustainable travel practices

Seen as part of the Tasmanian ethos, and motivates people to act to ensure achievements remain in place

Concepts feel less tokenistic

The ideas being put forward align with existing policies and actions in place by Tasmania

It is what Tasmanians are living and breathing to maintain their sustainable efforts and are not 'just for show'

This shows they have put a lot of effort in to make these choices, not just jumping on the bandwagon (Not travelled to Tasmania, 25-45)

Ideas gain a little more credibility

Factual information and objective data points increase the credibility of sustainability concepts and encourage action

The ideas are created by 'the experts' who can substantiate the impact of their efforts

Benefit of participating is more tangible

Proofs points provide tangible evidence initiatives can work

With such achievements, they are more motivated to support and participate in Tasmania's sustainability efforts during their travels – they want to contribute to this success

In some ways, being explicit in what has contributed to Tasmania reaching the position that they're in, you know, it's probably going to get more buy in from me (Not travelled to Tasmania, 25-45)





Beyond the concepts there is an opportunity to better promote Tasmania's sustainability efforts to drive greater connection and engagement with travellers

Climate achievements are newsworthy, and have potential to positively influence perceptions of Tasmania as an interesting place to visit with unique elements

Presently no destinations own the 'more sustainable' positioning, and Tasmania's achievements provide the credibility needed to take over this space

A dramatic photograph of a sea cave. The walls are composed of dark, layered rock formations, possibly limestone or sandstone, showing clear horizontal strata. The water inside the cave is a vibrant turquoise color, contrasting sharply with the dark rock. The lighting is low, with a bright light source from the left creating a strong highlight on the water and the rock wall. The overall mood is mysterious and awe-inspiring.

9

Where to from here?

Australians really want to live a sustainable lifestyle

76%

compared to 84% of global citizens

But we're not actively changing our behaviours

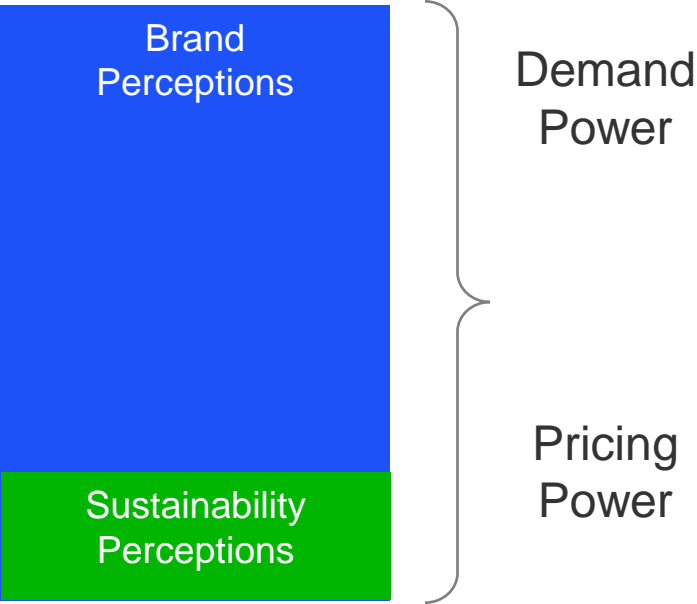
22%

compared to 27% of global citizens

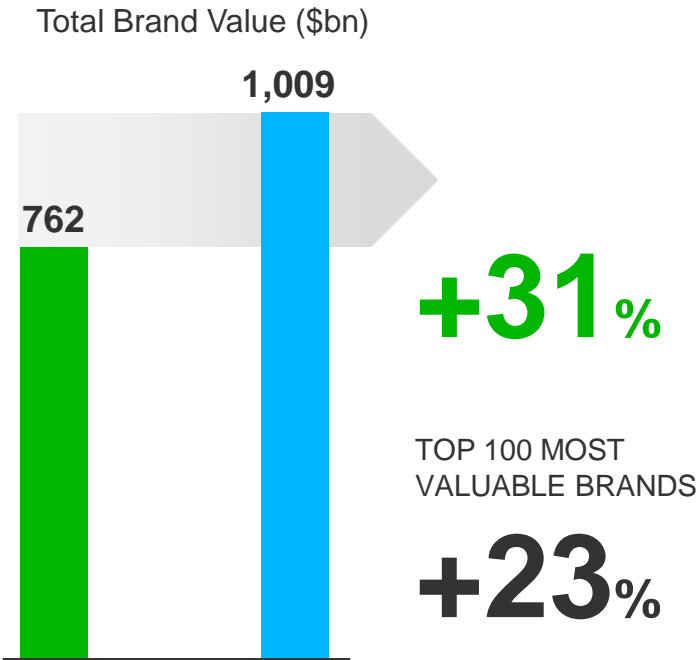
There is a huge opportunity for brands and businesses to play here. We know Aussies have good intentions and want to support sustainable behaviours – but struggle to translate their values into something that's easily actionable for them – this is what we call the value action gap. The value action gap is typically driven through inertia, cost, and a lack of awareness of the impact consumer action will bring

Will Net Zero create a competitive advantage? | Sustainability is a door to building brand equity and competitive advantage

Sustainability is one of the drivers to **two brand equity outcomes**

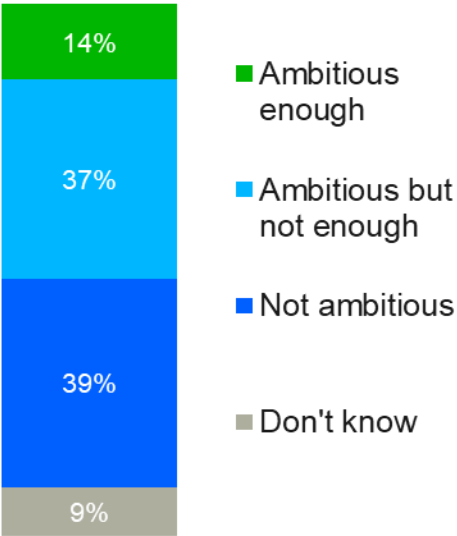


Brands rating highly on BrandZ Sustainability Index **grew brand value by 31%** in total vs. 2021



Identifying ownable territories that resonate in the market and add to the power of your brand is key to success

People think current businesses' plans to tackle climate change are not ambitious enough



Tasmania has the credentials to be a low emissions leader – through promoting current sustainability achievements

Creates a positive connection to Tasmania

People are proud of what has been achieved

Provides a feel-good factor to visiting and supporting through tourism

Ownable and credible supported by achievements

Tasmania is already a leader on a global stage – people just don't know about it

Proof points dramatize they are already doing this well above the majority

Leading through example is motivating

Has the potential to encourage more people to come and learn, or at least support initiatives as they want to feel part of the success

Communication is key – people want to know

Opportunity to raise awareness around sustainability work, while also promoting Tasmania, the proof points are worth sharing unashamedly

People selfishly want this more broadly shared so as Australians they can also enjoy the positive perceptions

There is a clear value-action gap that impacts people's engagement with current sustainable initiatives – people need help overcoming barriers to close that gap, so any new initiatives need to take this into account

Make it easy

People want to help but they don't want to drive the change

They want to support by association and have sustainable ideas integrated with what they are already doing

This is especially important for travel where many don't want it to interfere with what they have come to do

Show them how

Help them overcome decision paralysis by showing them what they can do to make more sustainable choices

This will make a politically charged and confronting idea feel more realistic and attainable

Make it affordable

While there is an acceptance that sometimes sustainability costs more – it is reluctantly so

When connected to travel this can be the decider between doing and not doing

There needs to be a balance so that doing good remains affordable in an increasingly expensive world

Make them opt out, not opt in

This speaks to integration; people are less likely to opt out if it is already included

Consider how ideas can be incorporated and let people know the hard work is done – but they can opt out of the choose

Positioning and framing in a positive way will support people feeling better about sustainability inclusions

E.g. This includes \$2 that goes to XXX, by you eating here/ hiring this you are supporting XXX

Low emissions trip planner is the most resonant concept, though elements from all concepts have merit and potential. Is there an opportunity to create a hybrid offer that uses the best elements of the three?

Trip Planner | Ideas are fun and motivating

Engaged by the interesting ideas to see and do in Tasmania, has the potential to be trip inspiration

Low emissions are secondary to this idea – though people like to know the options they choose are better environmentally

This idea has the broadest and most relevant appeal

Consider positioning and how low emissions is presented to make this even more enticing

Environmental Protection | Firsthand unique experiences resonate

Where there is a range of ways to engage, and choice is perceived this idea has great resonance

Ensure the tone and style remains fun and focussed on things that can easily be incorporated into their trip to make it more memorable and meaningful

Remember to balance the education piece as learning and connecting with local experts is great, but not the focus of leisure travel

Carbon Offset | Local and tangible offsets and education differentiate

Best connected with Tasmanian proof points to add impact

Connection to tangible offset programs aids credibility to this concept

The calculator has interest as a means of better understanding emissions generally

But this can be interpreted as complex and time consuming – flight offsets just tick a box

Consider how to simplify to improve this idea

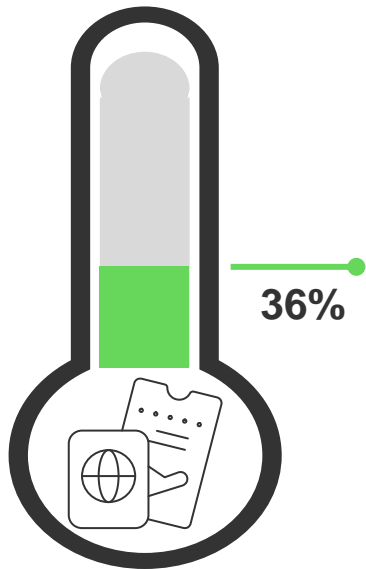
What could a hybrid look like?

Appeal in a version that includes elements of all three ideas, so people have choice

- Trip Planner as the base, including signposting of low emission options
- Unique conservation experiences as part of the planner
- And a way to see your emissions using the calculator and adjust the planner as desired – with the option to offset

Is Tourism Tasmania right to be worried about greenwashing? | Yes.. Whilst we know some organisations are trying to exact real change, the language has become laden with provocation as opposed to addressing the desire to make an impact

More than 1 in 3 Australians see greenwashing as a topic to address in travel



Understanding greenwashing perceptions is key when considering which initiatives to tackle, and how best to communicate to travellers

Cynicism poses a real threat to travel sector brands and destinations. Our SSI looks at how people perceive your sector, and how that compares to others

We asked people if they have seen, or heard, false or misleading information about sustainable actions taken by brands by sector

The % of people saying yes is shown as the sector greenwashing score

Addressing sustainability in a meaningful way, linked to relevant sector concerns, brands can help prevent brand trust and credibility damage



For any initiatives and concepts being developed or tested further, consider these 4 pillars as they are key to engagement and cut through

Language needs to be consumer friendly

They need to have a clear understanding of what is being delivered and feel that information provided is transparent

Jargon and buzz words are more likely to disconnect

Don't be too technical

The majority do not understand the technical terms in the sustainability category

Any ideas need to be delivered simply to ensure comprehension

Broad appeal needed

Ideas that offer choice and a range for engagement and effort will be more broadly appealing – not everything is for everyone but there may be something small anyone can do

Consider how to ensure there is broad appeal and that ideas are category relevant

Remember to be fun

Initiatives that are connected to travel need to connect with the travel mindset – fun, interesting and memorable

Ensuring the tone and offer aligns with what people need from their holidays will help any ideas have greater resonance and interest

Kantar's **Sustainability Sector Index** is the foundation of strategic framing, helping you understand consumer needs and your role to play as a brand or category

1

How do sustainability issues impact people?

What people care about and act upon is strongly linked to where they are in the world. We explore how sustainability connects and impacts people's lives overall and in connection to the 17 SDGs.

2

How well is your sector meeting people expectations?

View how your sector is perceived against critical sustainability territories like climate change as well as key marketing pillars like strategy, innovation, activation, impact and social / greenwashing to further inform your action plans.

3

What issues most affect your sector?

Identify and prioritise the most relevant concerns for your brand. We look at issues directly associated with your sector and how that compares to the issues people are most concerned about in general and in their own country.

4

What are the related sustainable behaviours?

Uncover the behaviour dynamics at play in your category, the level of Value-Action gap and the most tangible barriers to adoption of sustainable offering in your category.

5

How to hit the right messaging, tone and audiences?

Find out about the different target audiences to engage, how to reach them with the right degree of message sophistication, and what style of communication people are most receptive to.



KANTAR



Thank you

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