



Testing the Tasmanian Net Zero Program

May 2024

- Overall findings
- Background and objectives
- Methodology
- Current status
- Testing the Net Zero Program
- Testing the impact of Tasmania's climate achievements
- Key point summary



Background

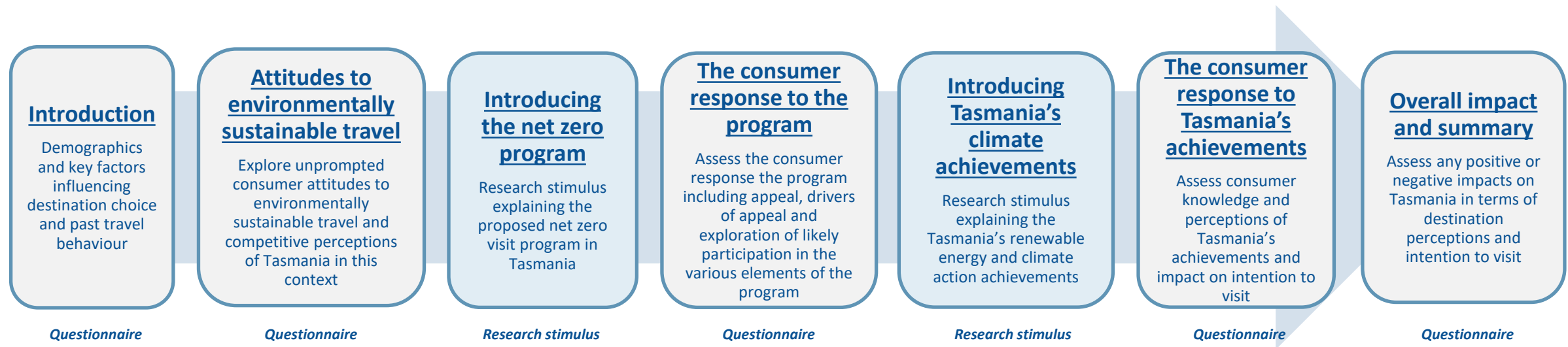
Through the delivery of the 2030 Visitor Economy Strategy, Tasmania has a goal to be a leading destination for environmentally sustainable travel. Actions to achieve this are focussed on supporting industry to understand and calculate their emissions footprint and grants to support implementation of their emissions reduction plan. From a visitor perspective, the Strategy includes the preparation of a Business Case to test the value and viability of establishing an opt-in net zero visit program to Tasmania.

BDA Marketing Planning was commissioned to conduct consumer research to provide key input to the business case via an assessment of the consumer response to the various potential elements of the net zero visit program

Objectives

- To understand the current views of consumers relating to environmentally sustainable travel overall and to Tasmania
- To measure consumers awareness of Tasmania's renewable energy and climate action achievements and assess the impact of these achievements on intention to visit if known
- To assess the consumer response to the conceptual net zero visit program overall and to the various potential elements of the program
- To assess consumers willingness to participate in the various elements of the program and exploration of willingness to pay for any financial contribution
- To understand and explore potential barriers and risks of the program among potential visitors
- Impact on perceptions of Tasmania from the net zero program and assessment of the potential impact on demand via an assessment of the change in intention to visit resulting from the program
- To identify key imperatives for the implementation of the program

- **BDA conducted original research via an online survey with respondents recruited via incentivized research panels**
 - The sample was n=1,003 leisure travellers (i.e. travelled for leisure in the last two years or intend to travel for leisure in the next two years) residing on the Australian mainland
 - Respondents were recruited to be representative of the mainland travelling population and responses were also weighted to align with national demographic breakdown
- **The stages of the survey are outlined below**

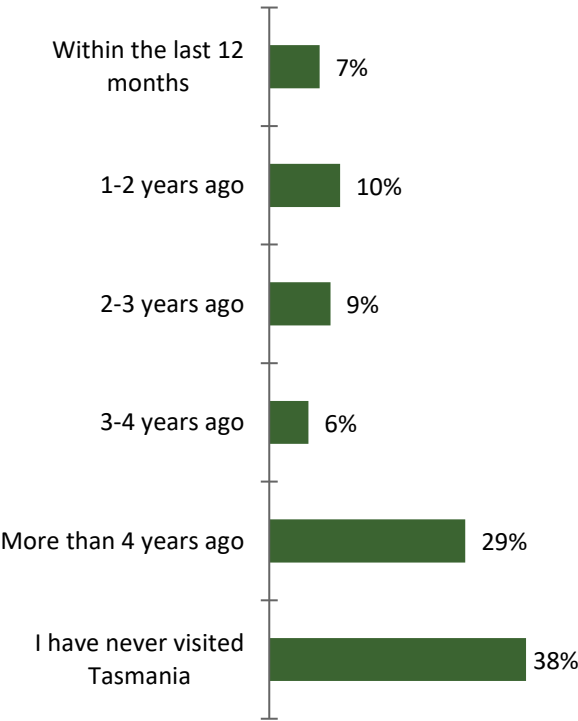


- Travel behaviour, consideration and intention
- Relative importance of sustainability
- State perceptions
- Carbon offset

- 17% have visited Tasmania in the last 2 years while 15% in the last 2 to 4 years
- Tasmania the 3rd most considered state to travel to in the next 2 years at 48%, Queensland leading at 57% followed by NSW at 49%
- When specifically asked about likelihood, 31% are very likely or certain to visit Tasmania for leisure in the next 2 years

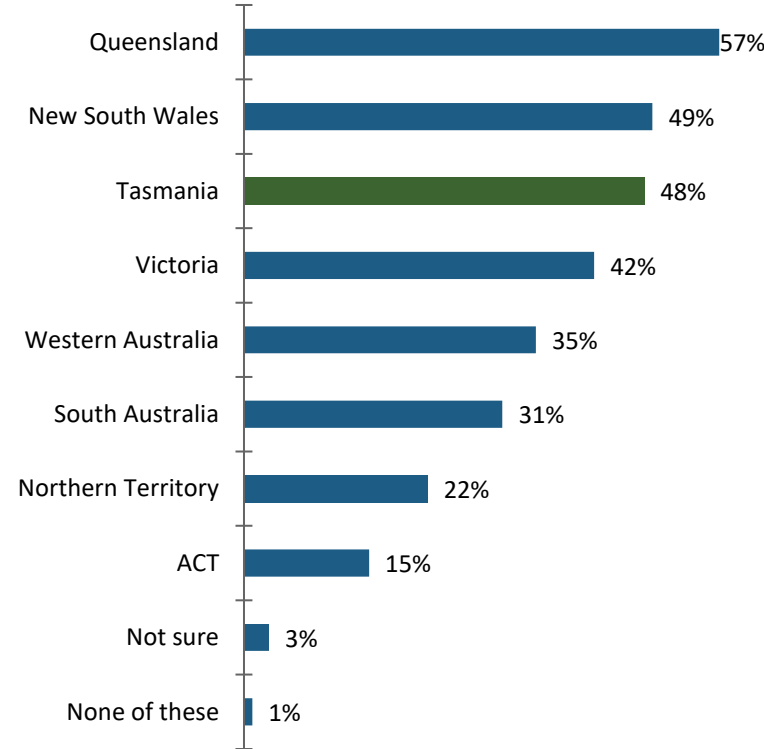
Previous visit to Tasmania

When was the last time you visited Tasmania
n=1003



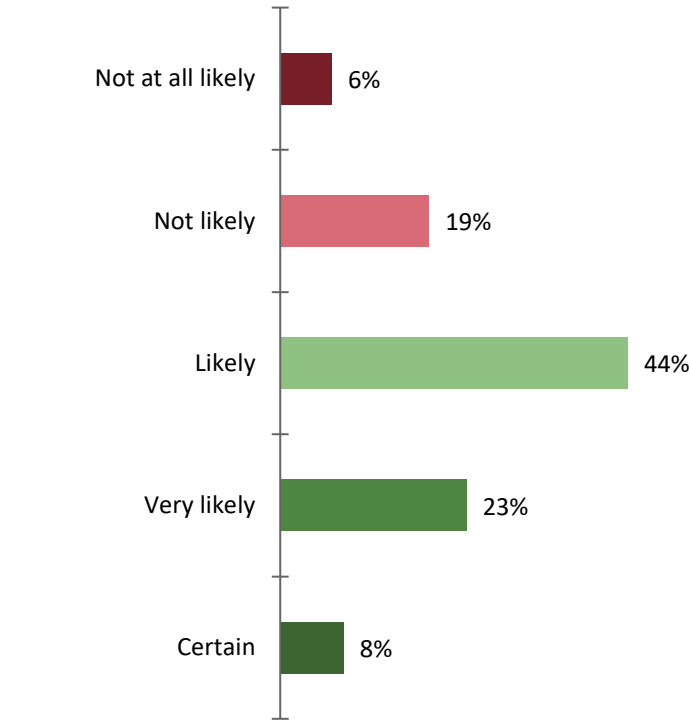
Travel consideration in next 2 years

Which of the following states or territories are you considering travelling to for leisure in the next 2 years?
n=1003



Likelihood to visit Tasmania for leisure in next 2 years

How likely are you to visit Tasmania for a leisure trip in the next 2 years?
n=1003



- **Good food and wine, aquatic experiences and history / heritage are the most important when choosing a leisure travel destination**
 - Touring and nature / wildlife very prominent as well
- **Sustainability factors are generally lower in the list when travellers are considering all of the destination drivers**
 - Environmentally sustainable tourism experiences and providers important to 19% overall, minimising carbon footprint lowest overall at 12%
 - Both clearly stronger with Tas intenders but still towards the lower end of the list of factors

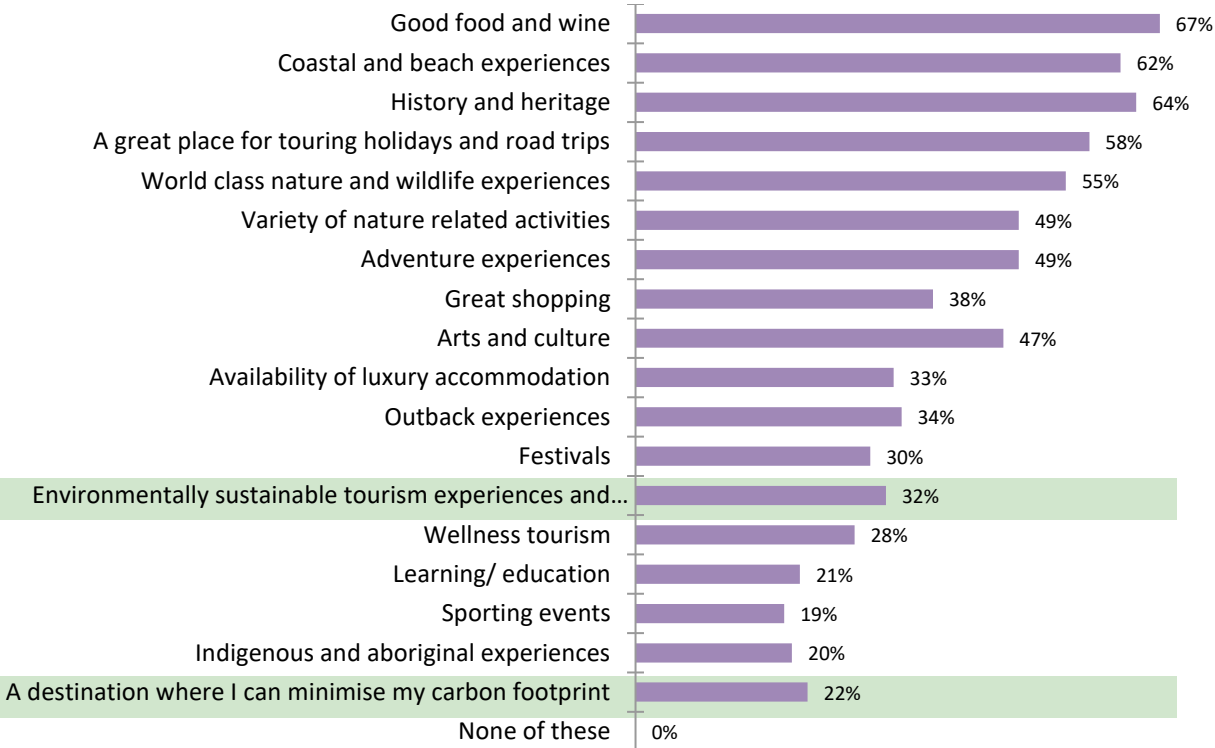
Important factors – Total leisure travellers

Which of the following factors are important to you when choosing a destination for leisure travel?
n=1003



Important factors – Tas Intenders

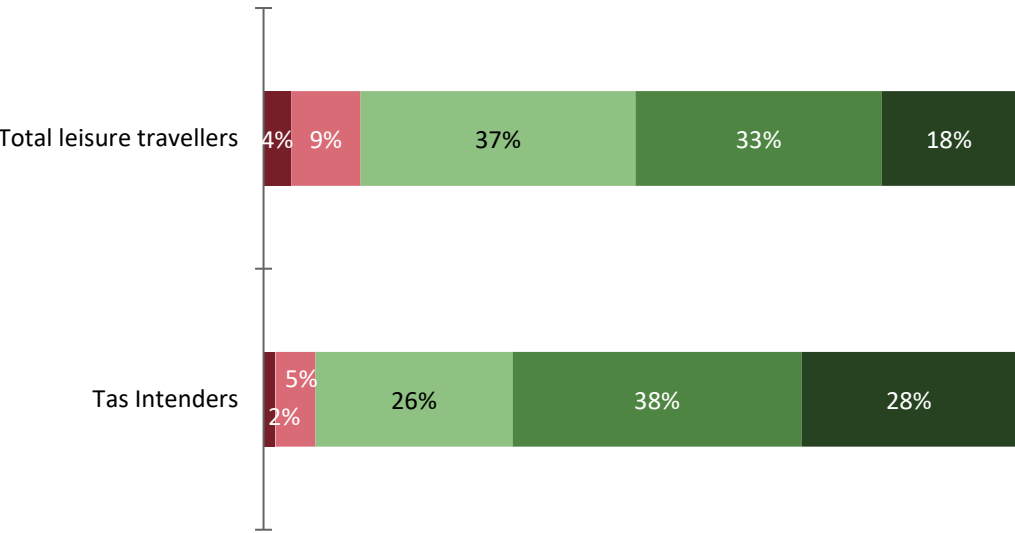
Which of the following factors are important to you when choosing a destination for leisure travel?
n=317



- 51% find environmental sustainability important in their life, however a smaller proportion (39%) find it important when making travel decisions
- Importance is clearly higher for Tas intenders across both

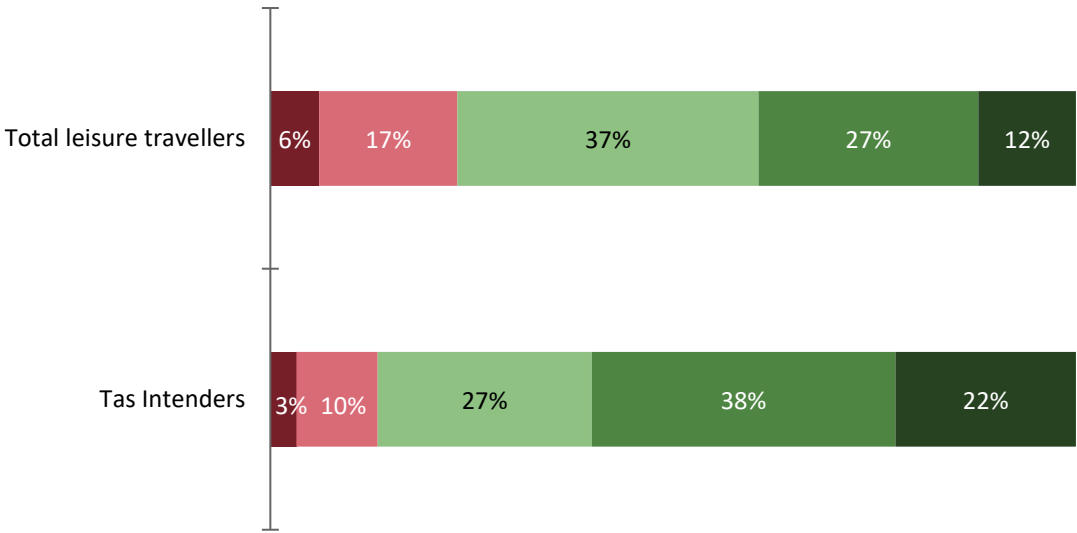
Importance in everyday life

How important would you say environmental sustainability is to you in your everyday life?
n=1003; 317



Importance when making decisions

How important would you say environmental sustainability is to you when making decisions on leisure travel?
n=1003; 317



■ Not at all important ■ Not very important ■ Somewhat important ■ Important ■ Very important

■ Not at all important ■ Not very important ■ Somewhat important ■ Important ■ Very important

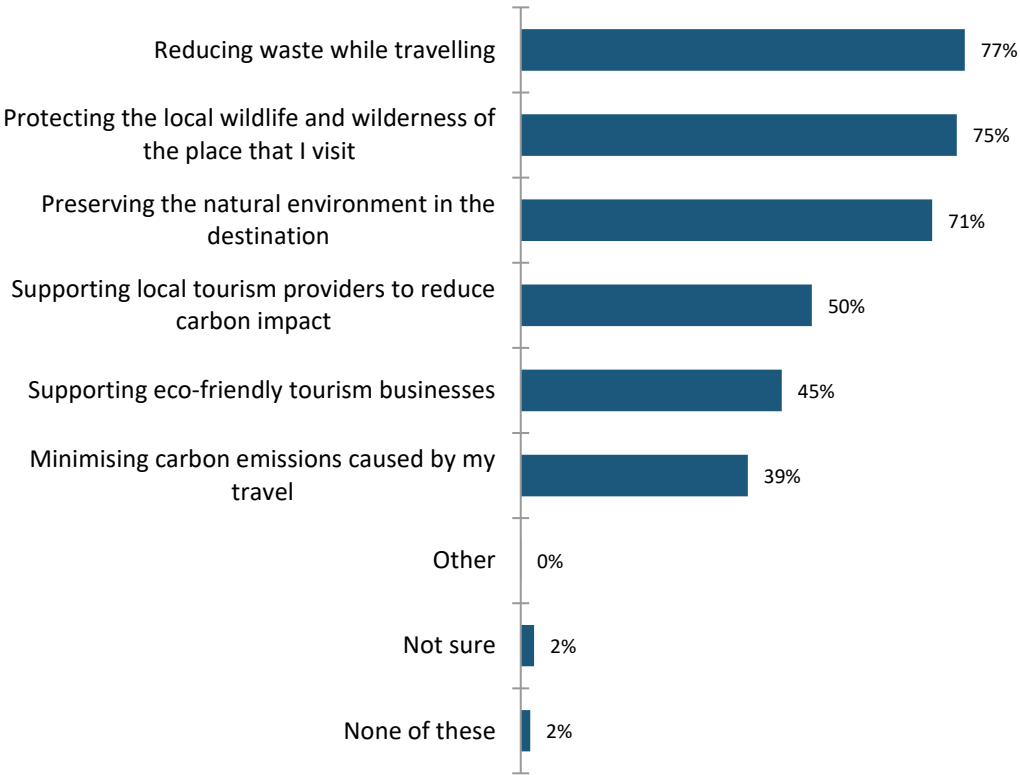
Important factors while considering sustainability and leisure travel



- **Reducing waste, protecting local wildlife and preserving the natural environment of the destination are the most important factors**
 - Minimising carbon emissions and supporting eco-friendly business are in the mix but relatively lower
 - All factors higher with Tas intenders

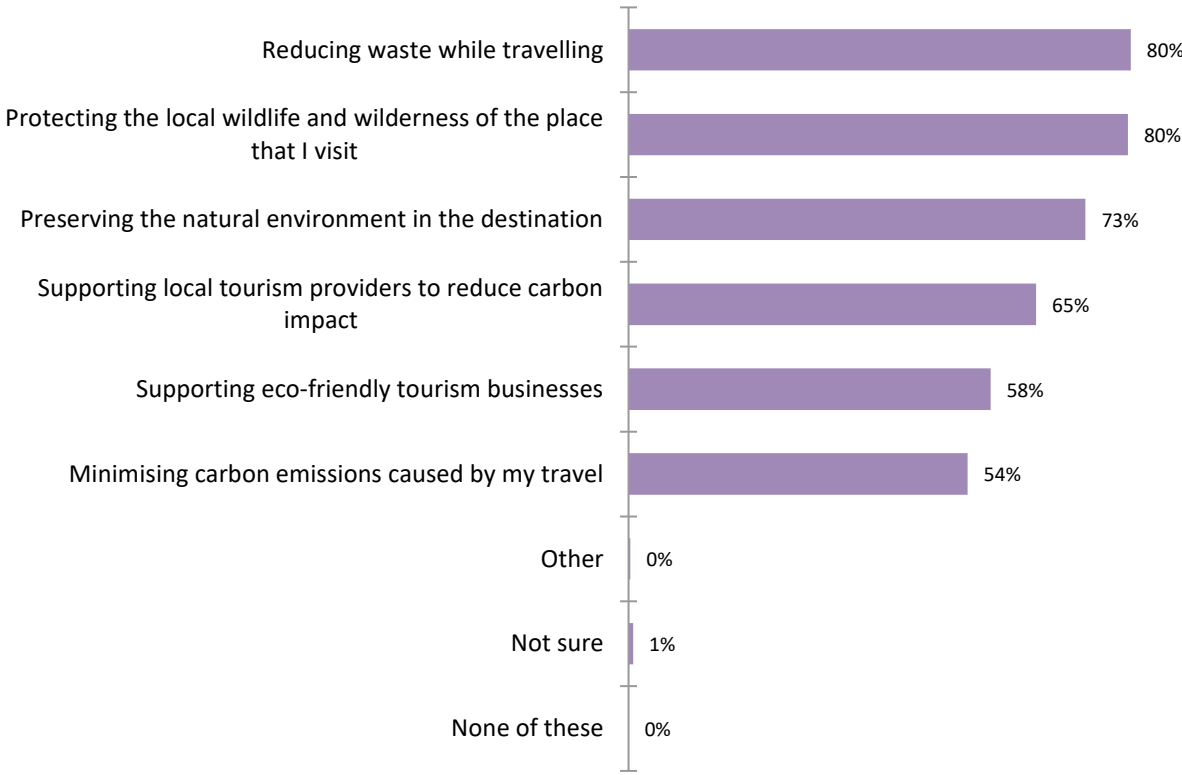
Important factors – Total leisure travellers

Which of the following aspects are important when considering environmental sustainability and leisure travel? % of those who find environmental sustainability not very important – very important. n=947



Important factors – Tas Intenders

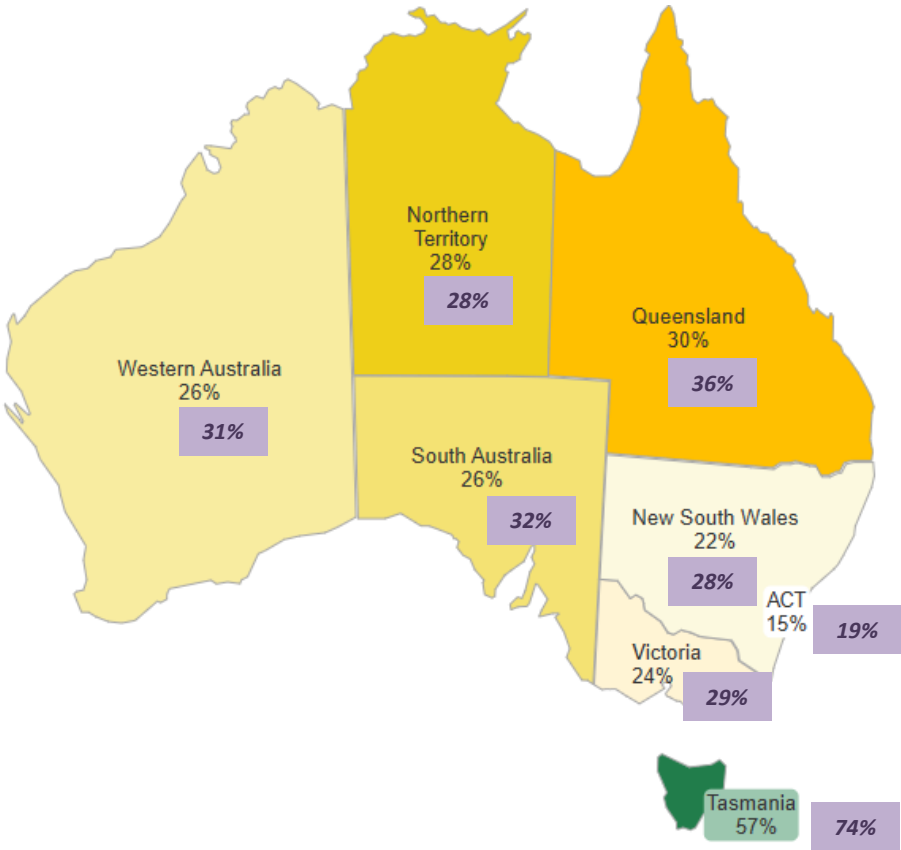
Which of the following aspects are important when considering environmental sustainability and leisure travel? % of those who find environmental sustainability not very important – very important. n=310



- **Tasmania is clearly the most associated state with environmental sustainability overall, leading with 57% agreement**
 - Queensland 2nd most associated at 30%, followed by Northern Territory with 28%
 - States with big cities like Melbourne and Sydney relatively lower in association with environmental sustainability, ACT lowest at 15%
- **Tas intenders have clearly stronger perceptions for Tasmania, slightly stronger for most other states / territories**

State associations with environmental sustainability

Which of the following states or territories do you associate with environmental sustainability overall?
n=1003

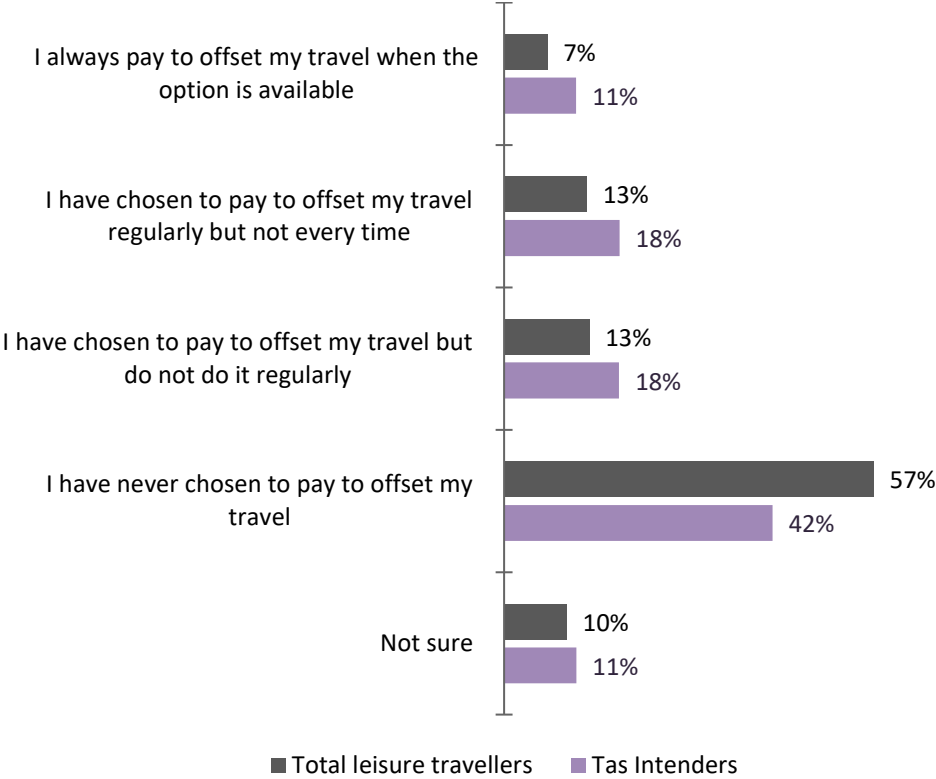


	Total	Tas Intenders
Not sure	3%	9%
None of these	1%	4%

- 7% always choose to offset, 11% of Tas intenders. A further 26% overall and 36% of Tas intenders have chosen to offset but not every time
- Almost 37% have low to no trust that the money paid is effectively used to offset carbon emissions, a further 37% have moderate trust, while only 18% have high or complete trust
 - Trust is higher with Tas intenders but still only 28% have high or complete trust

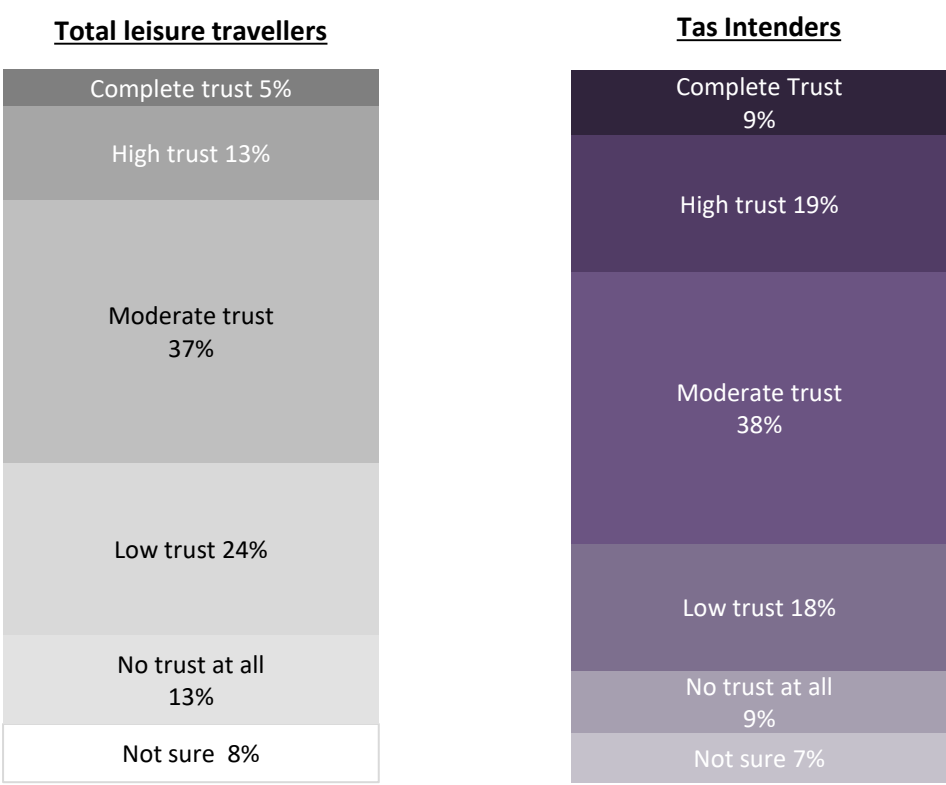
Past Participation in Offset Programs

Which of the following best describes your past participation in carbon offset program? *This is a program where you can pay extra to offset the carbon emissions of your travel (e.g. a flight)*
n=1003; 317



Trust in Carbon Offset programs

To what extent do you trust that the money that is paid to offset travel is genuinely used to effectively offset carbon emissions? n=1003; 317



Reasons for 'complete' or 'high' trust

Please briefly explain why you have complete trust or high trust that the money paid to offset travel is genuinely used to effectively offset carbon emissions. n=184

Trust in Program and Authorities

- *'Because I completely trust that this will be the case'*
- *'You have to trust the program that is run'*
- *'I trust they would do the right thing'*
- *'Offsetting carbon emissions is a high priority all across Australia at the moment, so I trust that it would be in the government's best interest to keeping aiming for that goal'*

...especially Tasmania

- *'Tasmania has been leading the world in effectively offsetting carbon emissions and I fully trust that money paid is used for the right purpose'*
- *'Trust in Tasmanian initiatives'*

Many highlight the positive environmental impact

- *'Sounds reasonable and beneficial to the environment'*
- *'What could be more important than protecting our environment'*
- *'It definitely offsets my carbon footprint'*

Importance of transparency and audit also driving trust

- *'There are regulations and audits that will at least identify if a business isn't doing the right things, along with the fact that there would be reporting and balances that would need to match'*
- *'I expect the operators to be honest and do the right thing'*
- *'There is an app to track so it can be monitored'*

Reasons for 'low' or 'no' trust

Please briefly explain why you have low trust or no trust that the money paid to offset travel is genuinely used to effectively offset carbon emissions. n=373

Lack of transparency:

- *'There's just not enough information provided about where the money goes and what projects are being funded'*
- *'The details about how the offsetting works are often unclear or buried in fine print.'*
- *'The distribution of funds seems opaque, and I'm concerned about how much actually goes to the intended cause.'*

Doubt regarding impact of carbon offset

- *'It's mostly just greenwashing and I'm doubtful it does any good at all'*
- *'I'm skeptical about whether these carbon offset programs actually make a meaningful difference in reducing overall emissions.'*
- *'There's a lack of evidence to show that buying carbon offsets leads to real reductions in greenhouse gas emissions.'*

Absence of accountability mechanisms

- *'There has been negative media about scams double dipping or claiming for projects that would have gone ahead anyway'*
- *'I don't trust the government or organisations who push it onto you'*

And perceptions of corporate profit motives

- *'Just a way for companies to make money'*
- *'I worry companies don't do the right thing with offsets'*

Responses to what could make them trust more

% excluding those who have complete trust

Is there anything that could make you have more trust in carbon offset programs? n=877

A strong desire for clear communication

- *'Information on how funds are utilised and those running the programs'*
- *'More information about how the offsets are tracked.'*
- *'More public documentation that is in plain language'*
- *'Transparent annual public disclosures that are fully audited.'*
- *'More official information from governments'*
- *'A fully costed project with complete disclosure of money collected and where it was distributed to.'*

...accompanied by evidence that the program is effective

- *'More scientific evidence and results seen'*
- *'Being better informed about the program and its results'*
- *'If they show people all the trees they are planting. If people can actually get hands on and plant the offset trees themselves.'*
- *'See actual things happening towards reduction in carbon pollution'*

A need for stronger measures in place to ensure legitimacy

- *'More significant penalties and Prosecutions for green washing'*
- *'Stricter regulation of the carbon offset industry'*
- *'A government mandated carbon trading platform'*
- *'Formal accreditation'*

Some also expressed scepticism about the overall effectiveness of carbon offset programs

- *'Not sure. Offset programs are general dodgy. Less air travel and IC engine use would be better'*
- *'Not really. The miniscule difference any of this will make to climate (if any) is not worth thinking about. Climate has changed radically since the earth began'*

Some offered alternative solutions

- *'Change to not producing the carbon in the first place. Offset programs are schemes to make people feel like they are doing something.'*
- *'Stop the political parties from flying all over the world when the job is here'*

A significant number of respondents were unsure or neutral about offset programs

- Visitor Carbon Offset Program
- Low Emissions Trip Planner
- Environmental protection
- Summary findings

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.



- 58% found the Visitor Carbon Offset component appealing or very appealing, clearly stronger with Tas intenders at 78%
- Knowing that contributions support Tasmanian based programs most appealing element
 - Flexibility around choice and ability to calculate the whole trip also prominent

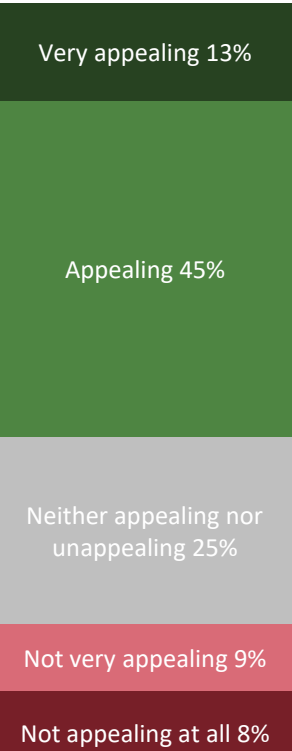
Appeal

How appealing is the Visitor Carbon Offset concept to you?
n=1003; 363

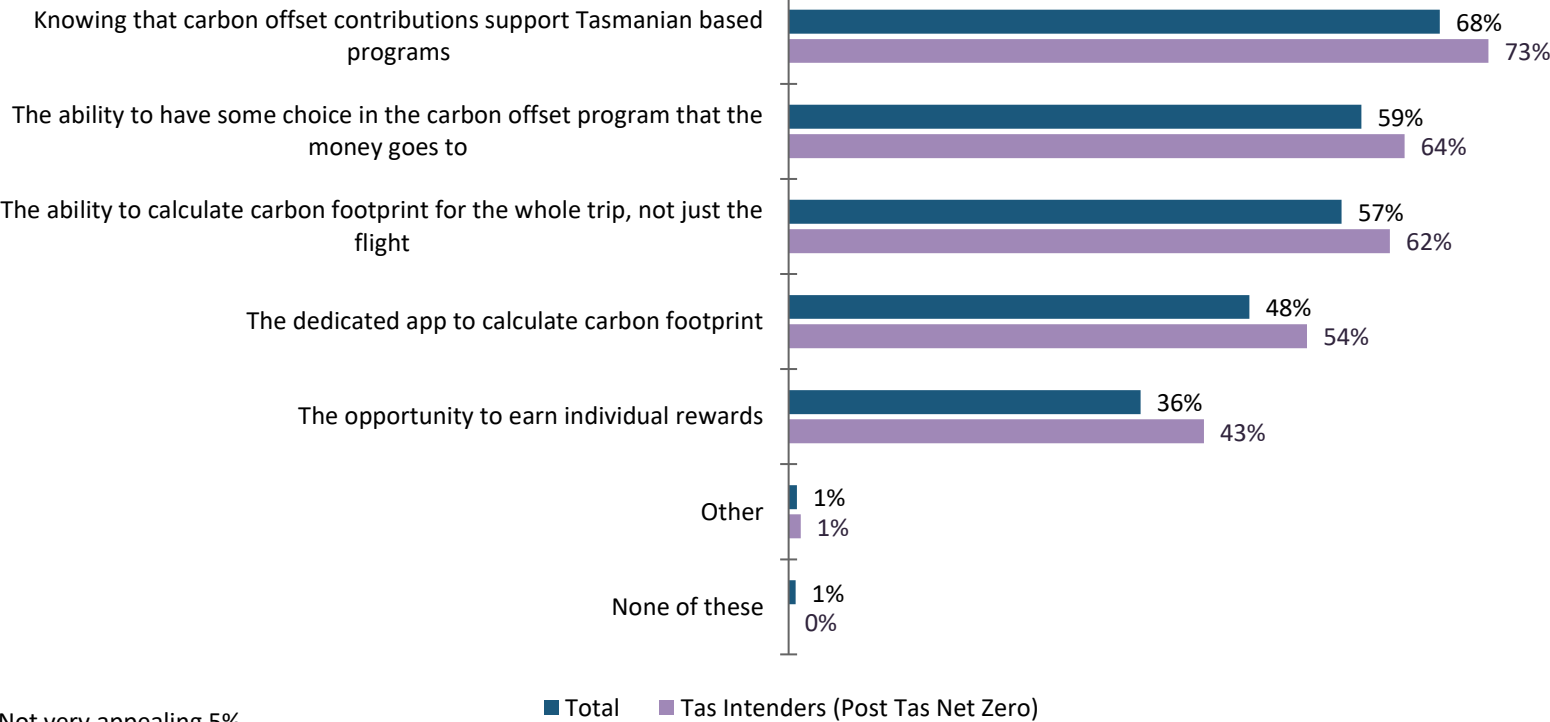
Elements of Appeal

% of those who found the concept appealing
Thinking about the Visitor Carbon Offset concept, which elements appeal to you?
n=577; 286

Total leisure travellers



Tas Intenders

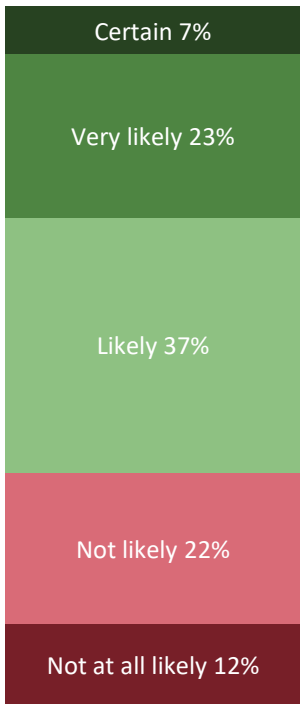


- **7% would be certain to participate, 15% of Tas intenders**
 - A further 23% overall and 41% of intenders would be very likely to offset if they were to visit Tasmania
- **Of these, more than 1/2 believe to participate while travelling in Tasmania, just over ¼ before arriving and few after leaving**
- **More than 2/3rds willing to spend under \$50 to offset their emissions, \$25 to \$50 the most common response**
 - Higher willingness to pay with Tas intenders, \$25-\$50 still most common but more are willing to contribute over \$50

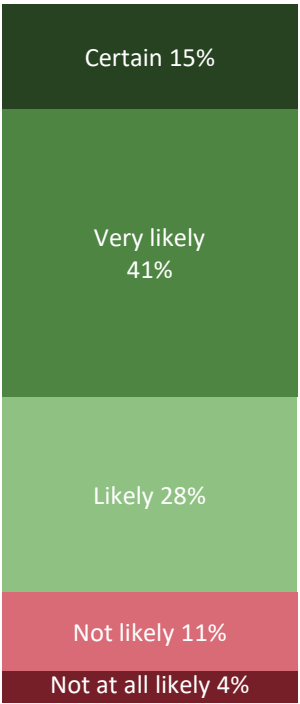
Likelihood to participate

If you were to visit Tasmania, how likely would you be to participate in the Visitor Carbon Offset concept?
n=1003; 363

Total leisure travellers

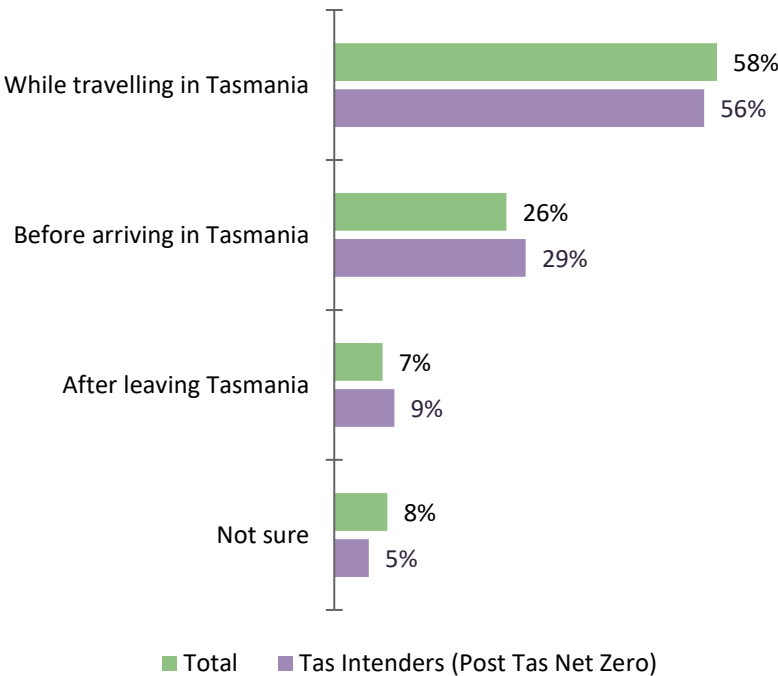


Tas Intenders



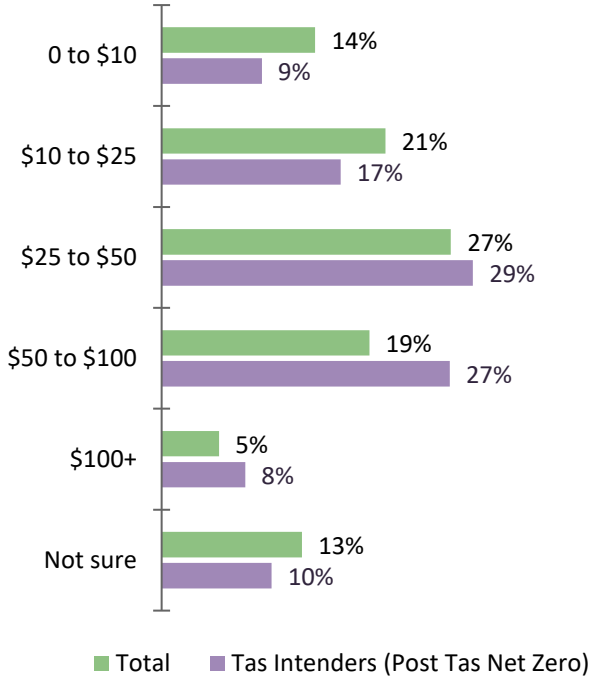
Participation timeframe

% of those likely – certain to participate
If you were to participate in the Visitor Carbon Offset component of the program, when do you think that would be?
n=671; 309



Intended contribution

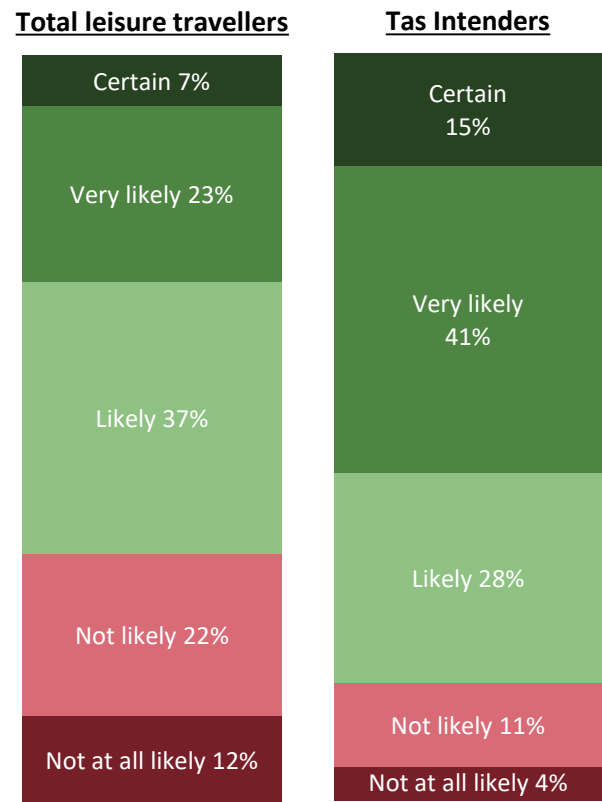
% of those likely – certain to participate
If you were to participate in the Visitor Carbon Offset concept, how much would you be willing to spend to offset your emissions? * n=671, 309



- Spending money on holiday or other things the leading reason to not participate in the concept at 40%
- Many also cannot afford to contribute while ~1/3 do not trust offset programs
- Just over ¼ would prefer to contribute in other ways, higher for Tas intenders

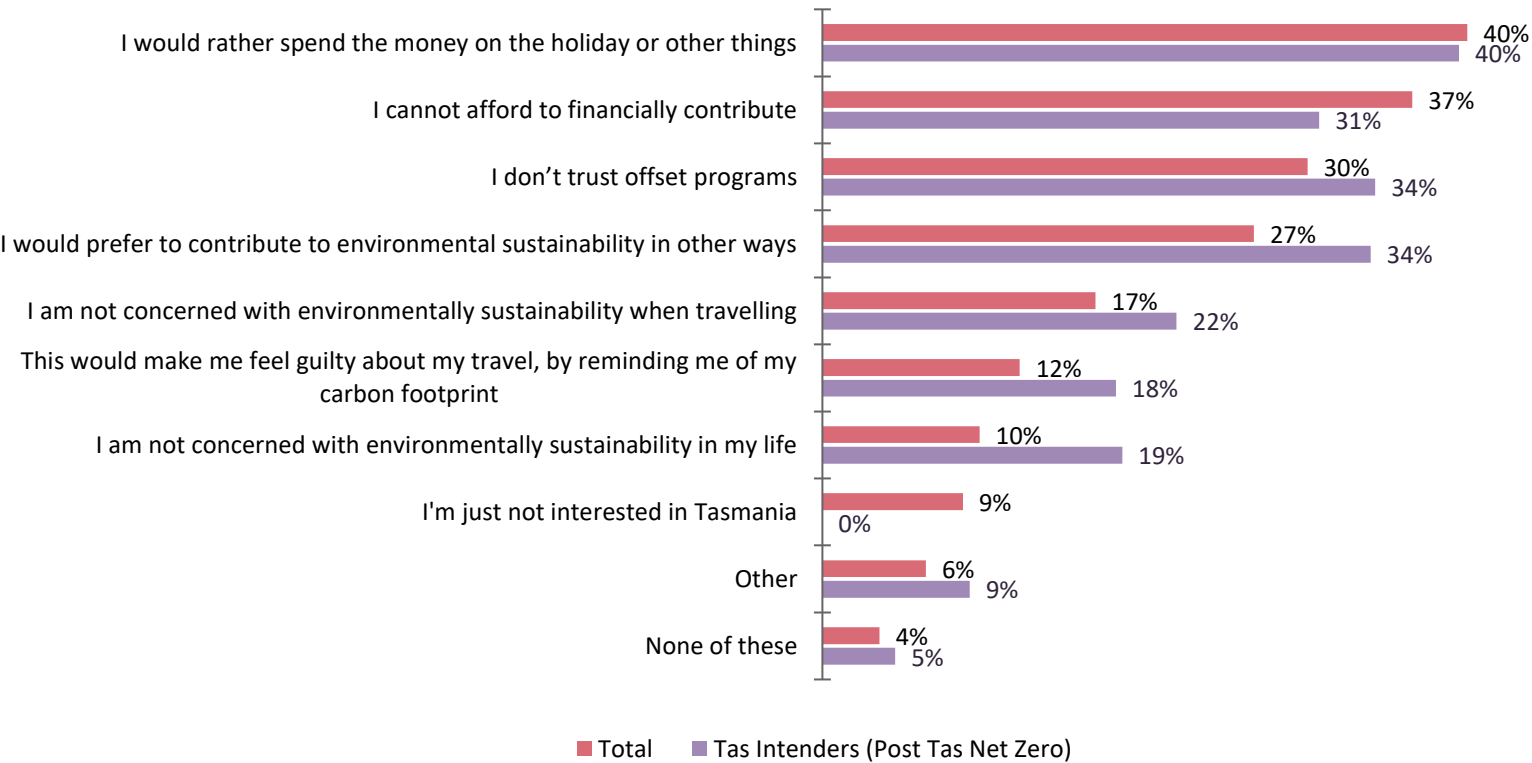
Likelihood to participate

If you were to visit Tasmania, how likely would you be to participate in the Visitor Carbon Offset concept?
n=1003; 363



Barriers to participation (% of those not likely or not at all likely to participate)

You indicated that you would not be 'very likely' or 'certain' to participate in the Visitor Carbon Offset concept. What are the reasons behind not being more likely to participate?
n=332; 54



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



- 17% found the Low Emissions Trip Planner component very appealing and more than 1/2 found it appealing, again clearly stronger with intenders
- Itineraries that allow engagement with appealing Tasmanian products and experiences have most appeal
- Information around low emission vehicle options lower but still ~ half find this appealing

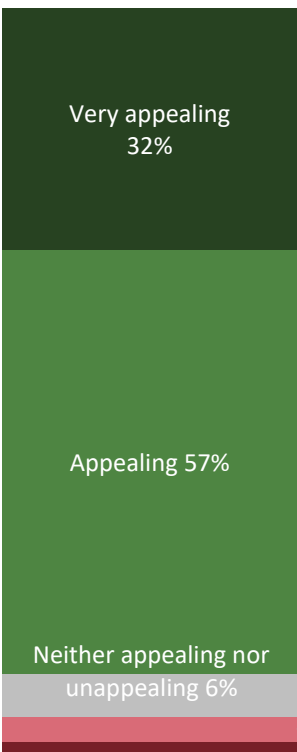
Appeal

How appealing is the Low Emissions Trip Planner component of the program to you?
n=1003; 363

Total leisure travellers

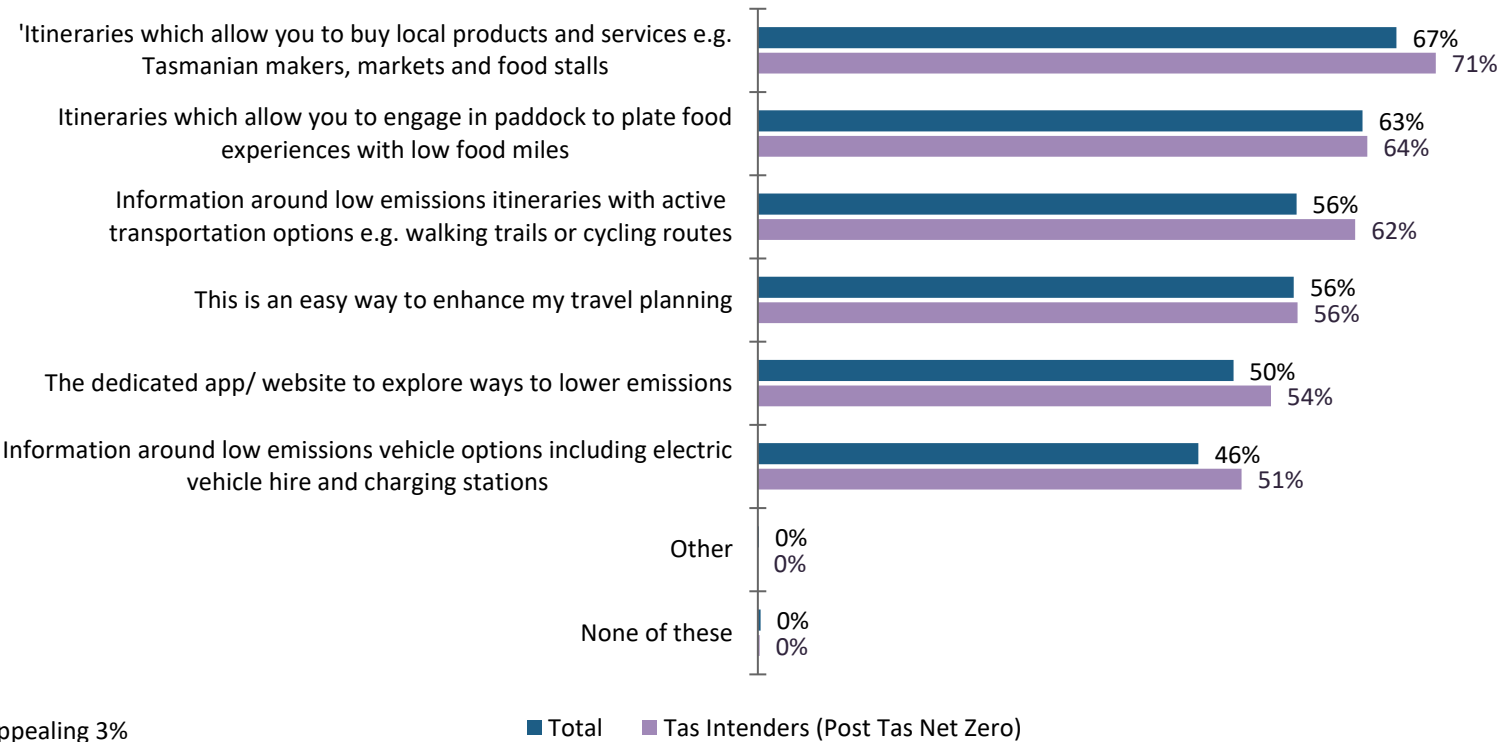


Tas Intenders



Elements of Appeal

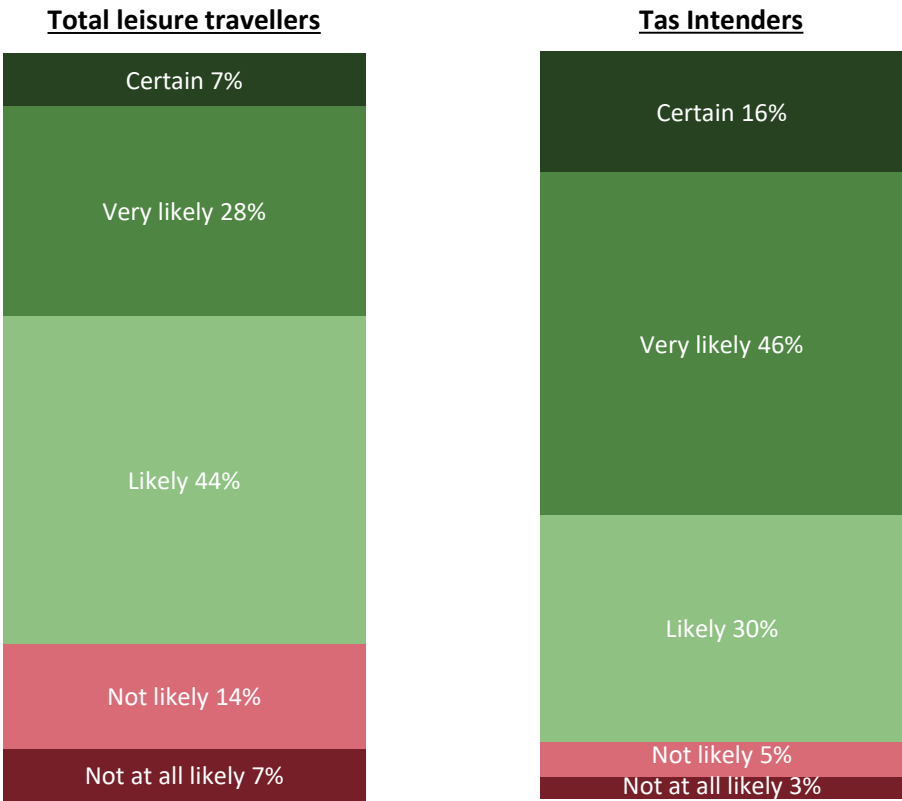
% of those who found the concept appealing
Thinking about the Low Emissions Trip Planner, which elements appeal to you?
n=696; 324



- **7% would be certain to engage with the low emissions trip planner, 16% of Tas intenders**
 - A further 28% overall and nearly half of Tas intenders are very likely
- **Just over 60% are likely to use the concept while travelling in Tasmania and just over half before arriving in Tasmania**

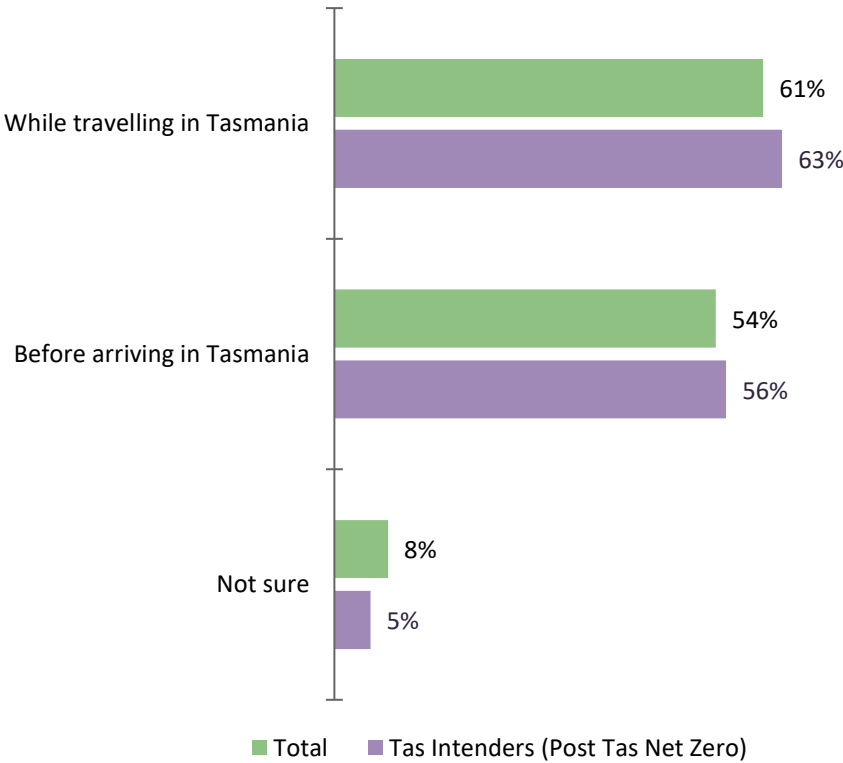
Likelihood to use concept

If you were to visit Tasmania, how likely would you be to use the Low Emissions Trip Planner concept?
n=1003; 363



Usage timeframe

% of those likely – certain to participate
If you were to use the Low Emissions Trip Planner concept, when do you think you use it?
n=808; 341

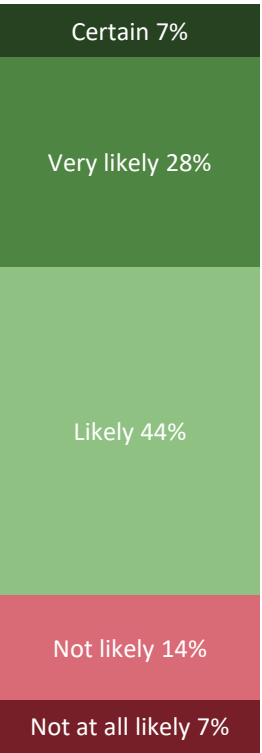


- Unappealing itinerary ideas the biggest barrier at 31% amongst those who are not likely to use the concept in their future travel to Tasmania
- 27% would prefer to contribute in other ways
- 24% are not concerned with environmental sustainability when travelling while 18% are not concerned with sustainability overall

Likelihood to use concept

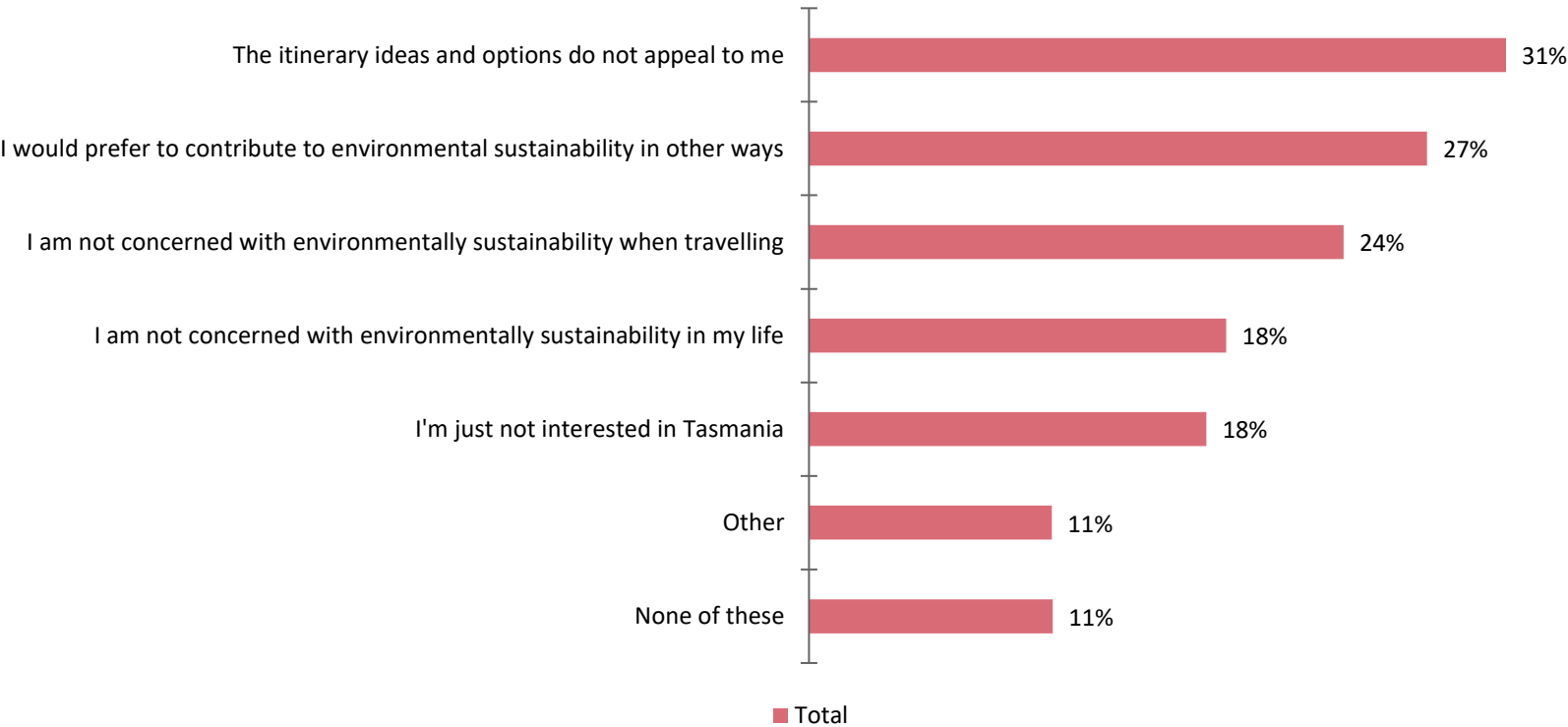
If you were to visit Tasmania, how likely would you be to use the Low Emissions Trip Planner concept?
n=1003

Total leisure travellers



Barriers to using the concept

You indicated that you would not be 'very likely' or 'certain' to use the Low Emissions Trip Planner concept. What are the reasons behind not being more likely to participate?
n=195



ENVIRONMENTAL PROTECTION

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

Actively participating and learning about environmental conservations 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.

ENVIRONMENTAL PROTECTION

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.

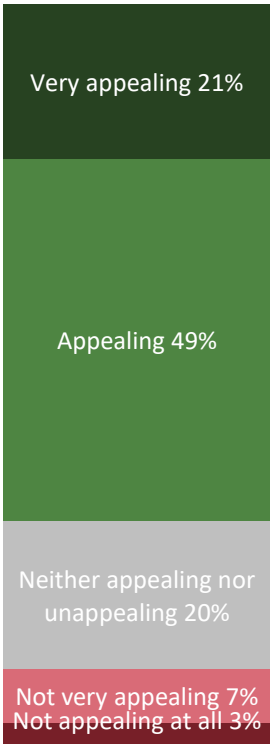


- 70% found the Environmental Protection component of the program appealing, 21% very appealing, again much stronger with intenders
- The opportunity to learn about Tasmania’s conservation practices leading, followed by the opportunity to directly support local programs
- Many also found the ability to choose which program to support appealing

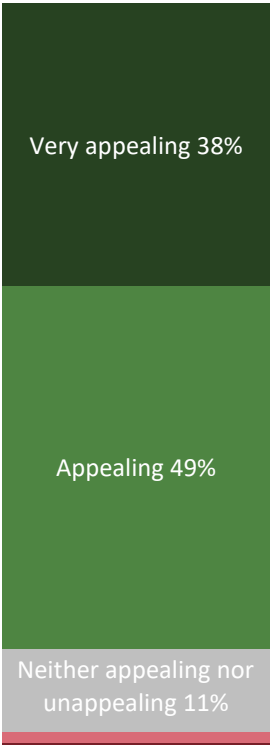
Appeal

How appealing is the Environmental Protection component of the program to you?
n=1003; 363

Total leisure travellers



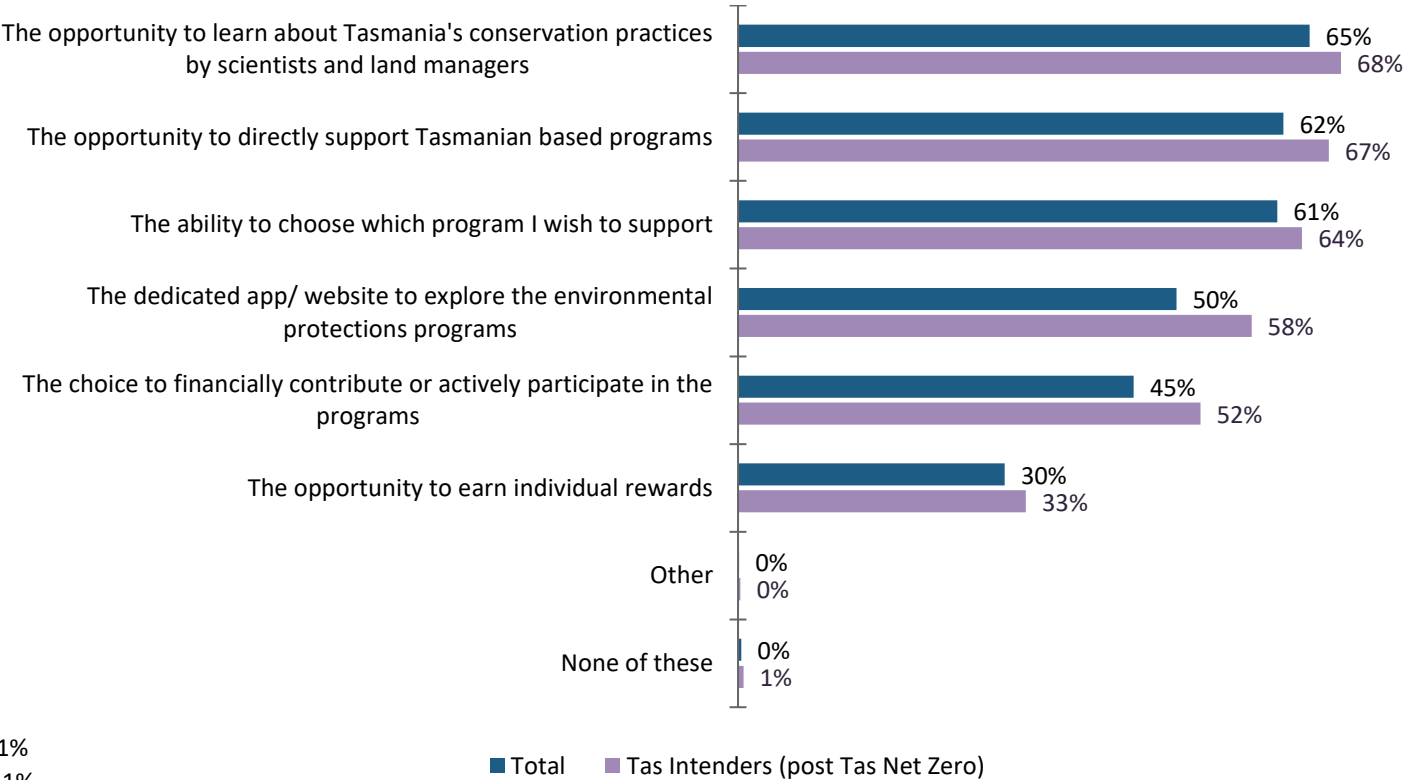
Tas Intenders



Not very appealing 1%
Not appealing at all 1%

Elements of Appeal

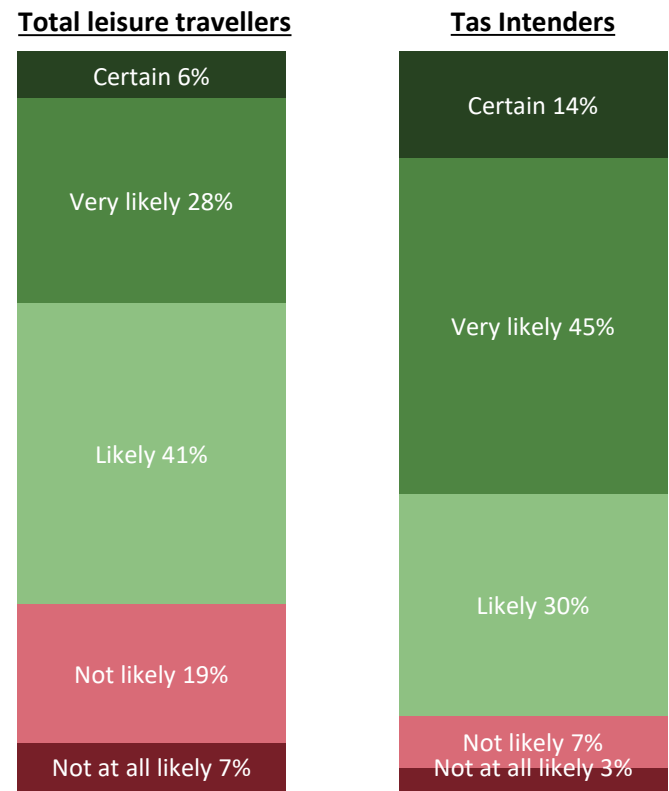
% of those who found the concept appealing
Thinking about the Environmental Protection concept, which elements appeal to you?
n=701; 315



- **6% would be certain to participate in this concept if they were to visit Tasmania in the future, 14% of Tas intenders**
 - A sizable proportion also very likely to participate
- **~1/2 would like to take part in educational activities, similar for participating in hands-on conservation activities and 36% would financially contribute**
 - All stronger with Tas intenders, 42% would financially contribute

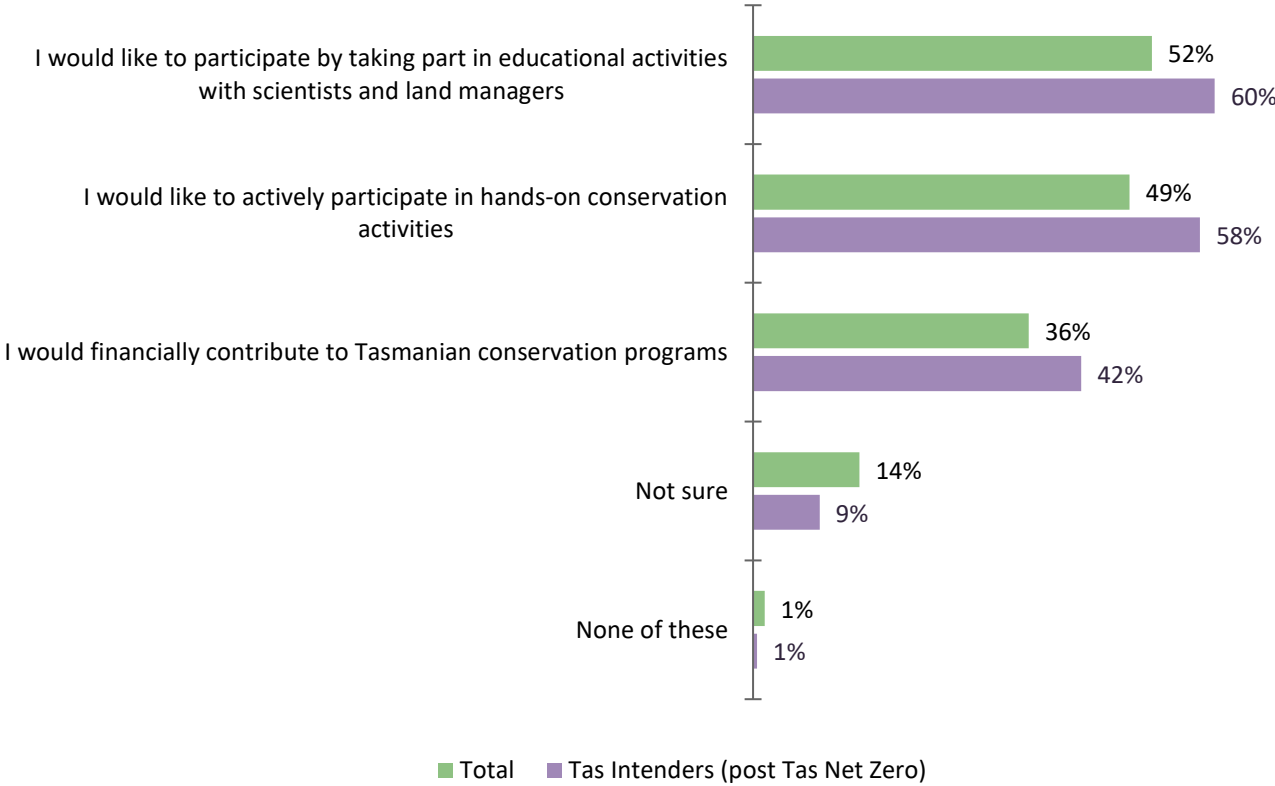
Likelihood to participate

If you were to visit Tasmania, how likely would you be to participate in the Environmental Protection concept?
n=1003; 363



Participation method

% of those likely – certain to participate
If you were to participate in the Environmental Protection concept, how you would participate?
n=753; 332

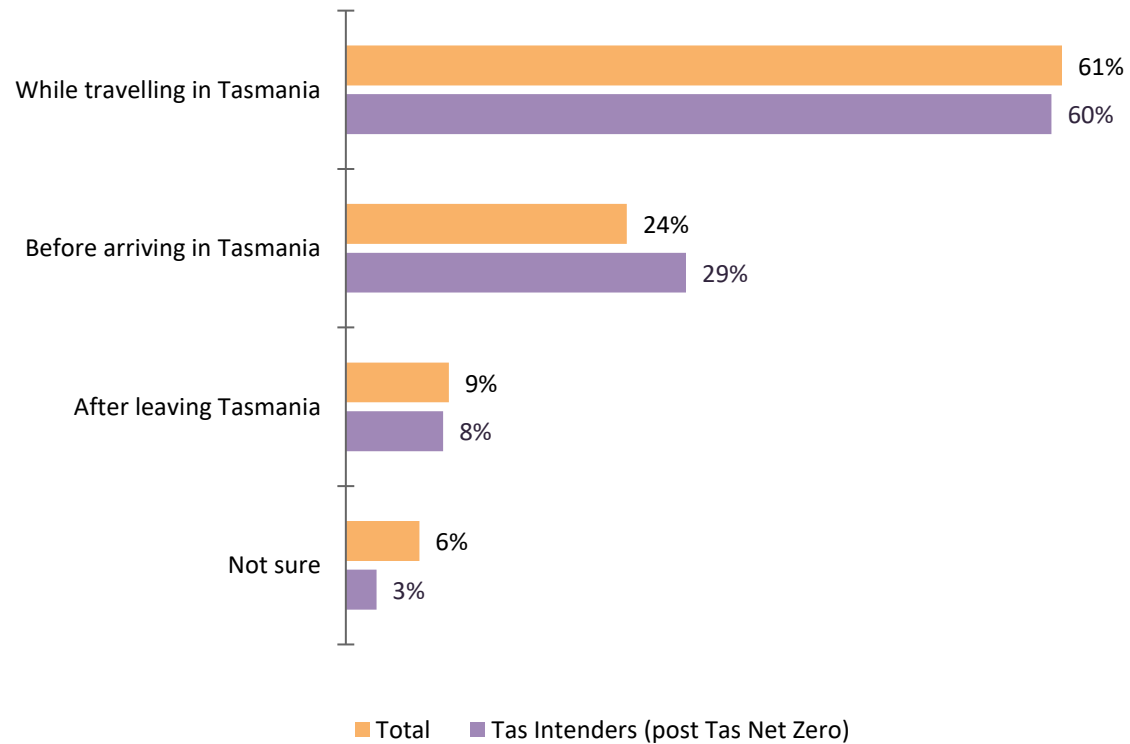


- ~60% of those who would financially contribute to the program would do so while travelling in Tasmania, 24% before arriving and 9% after leaving
- \$25 - \$50 is the most common contribution overall though Tas intenders would contribute more

Participation timeframe

% of those who would financially contribute

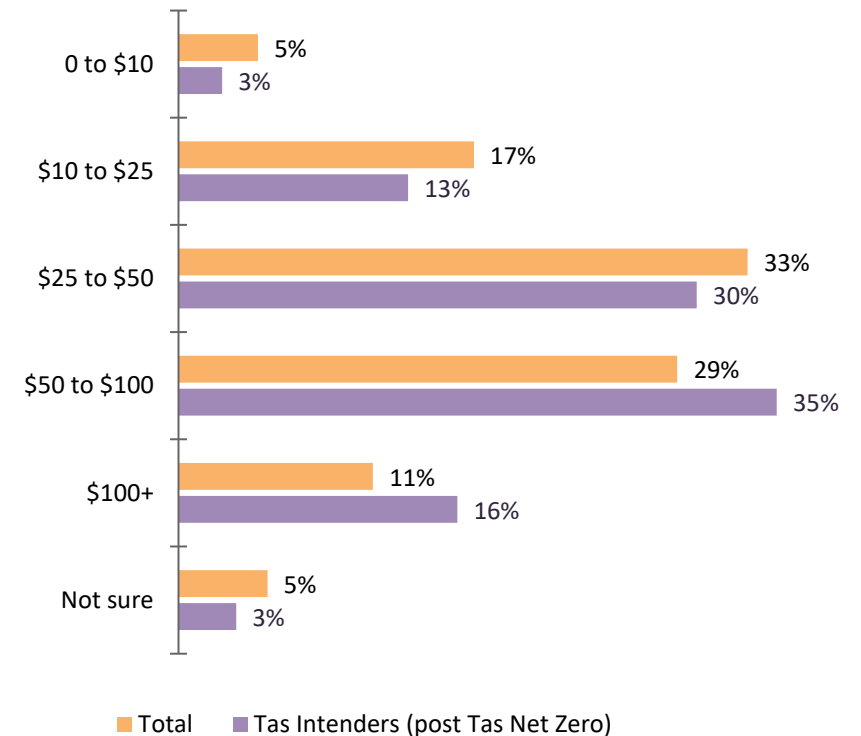
If you were to financially contribute to Tasmanian Conservation Programs, when do you think you would make this contribution? n=277;148



Intended contribution

% of those who would financially contribute

If you were to financially contribute to Tasmanian conservation programs, how much overall do you think you would contribute? n=277; 148

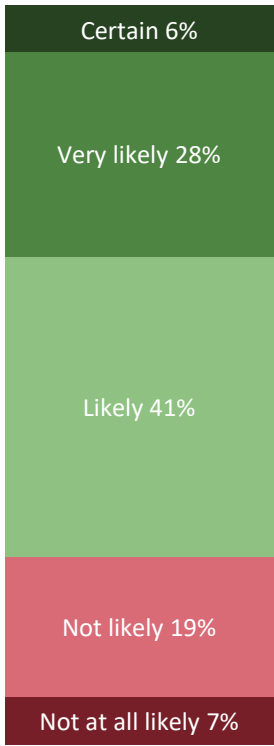


- Preference to spend holiday time and holiday money on other things leading barriers amongst those who are not likely to participate
- 36% cannot afford to financially contribute while 22% would like to contribute in other ways
- 18% don't think about environmental sustainability when travelling

Likelihood to participate

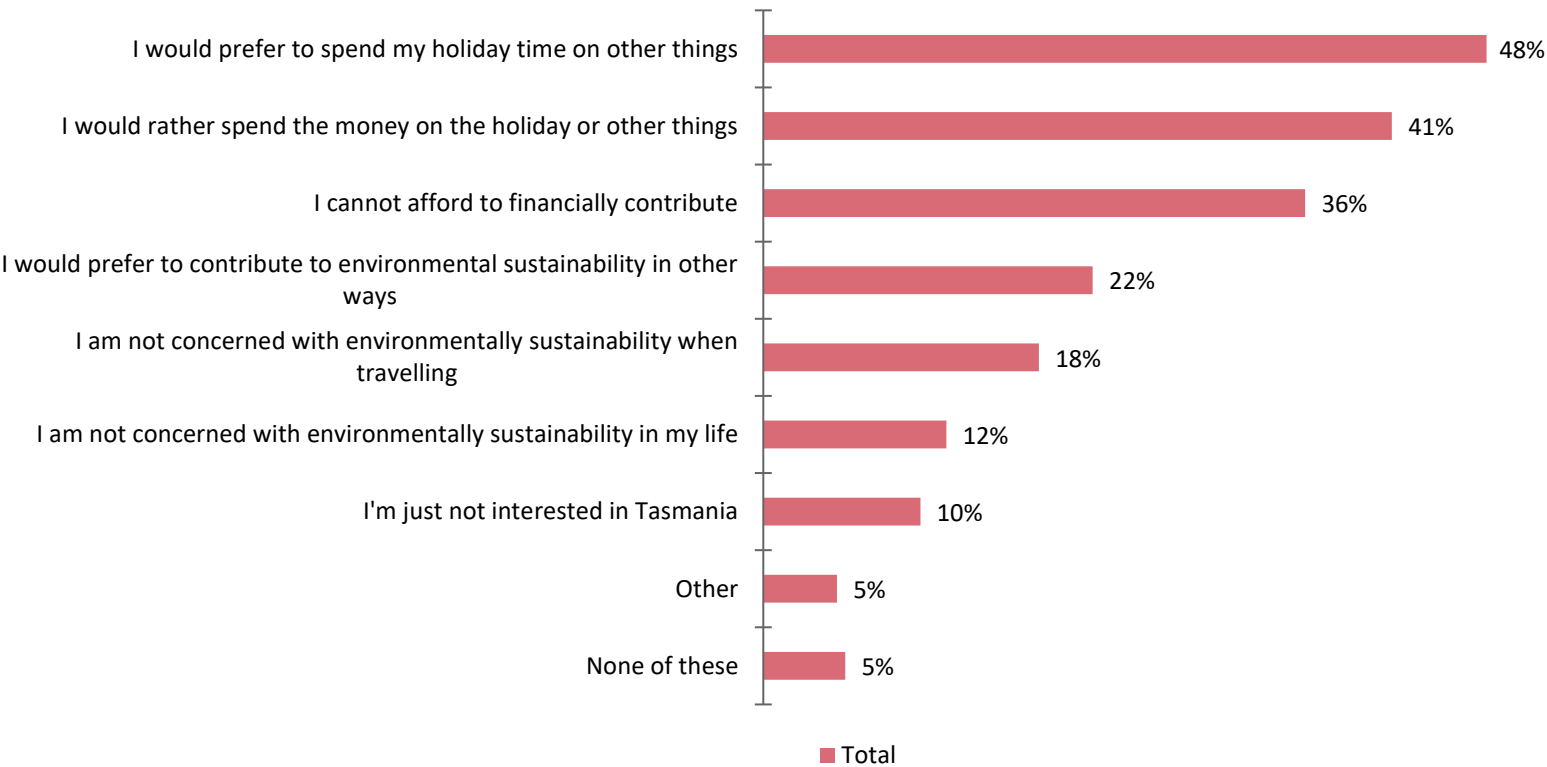
If you were to visit Tasmania, how likely would you be to participate in the Environmental Protection concept?
n=1003

Total leisure travellers



Barriers to using the concept

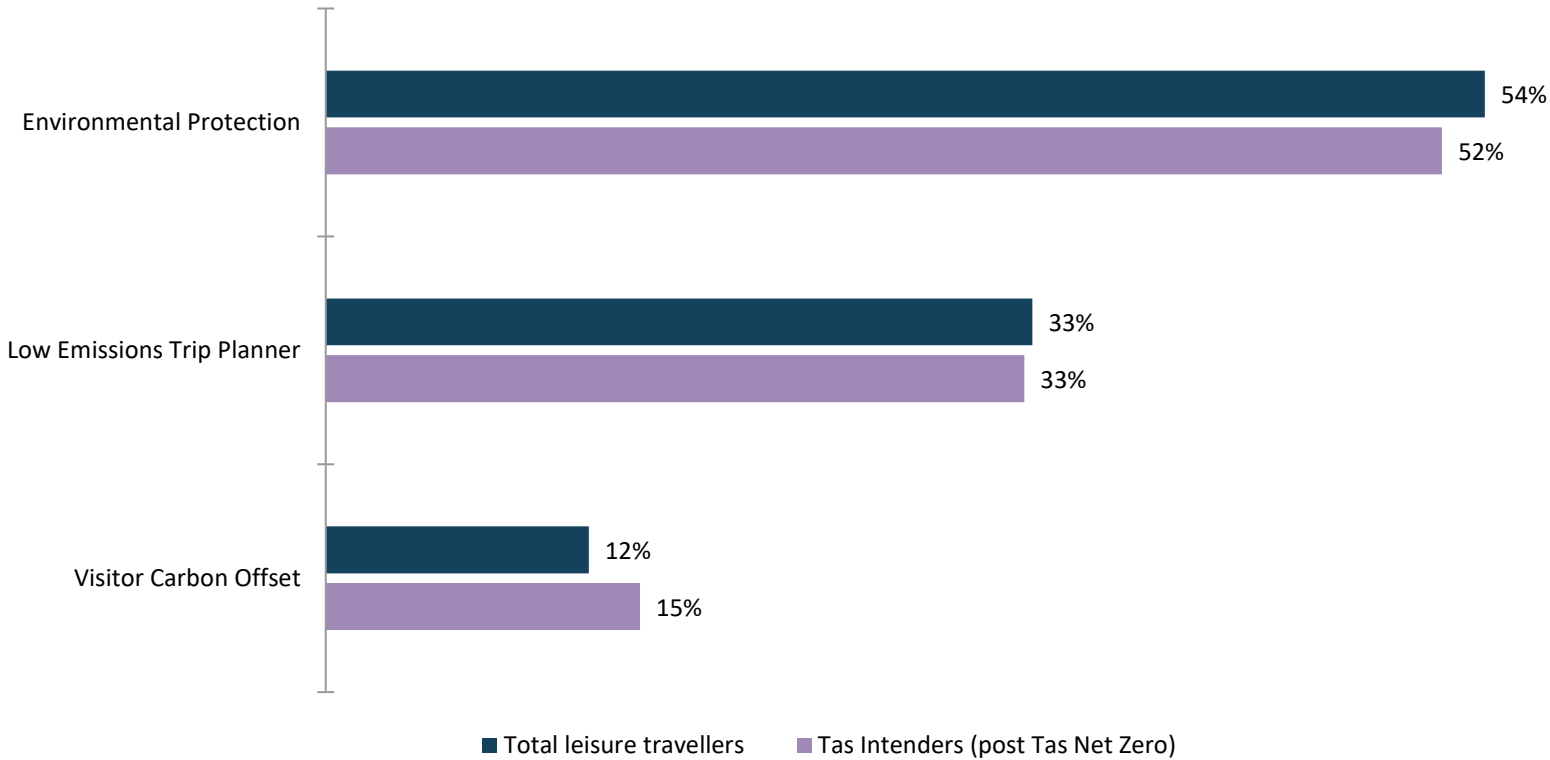
You indicated that you would not be 'very likely' or 'certain' to participate in the Environmental Protection component of the program. What are the reasons behind not being more likely to participate?
n=250



- Environmental protection the most preferred amongst all concepts with more than 1/2 ranking it #1
- ~1/3 prefer the low emissions trip planner while a smaller proportion are most attracted to the carbon offset program

Preference – Rank 1

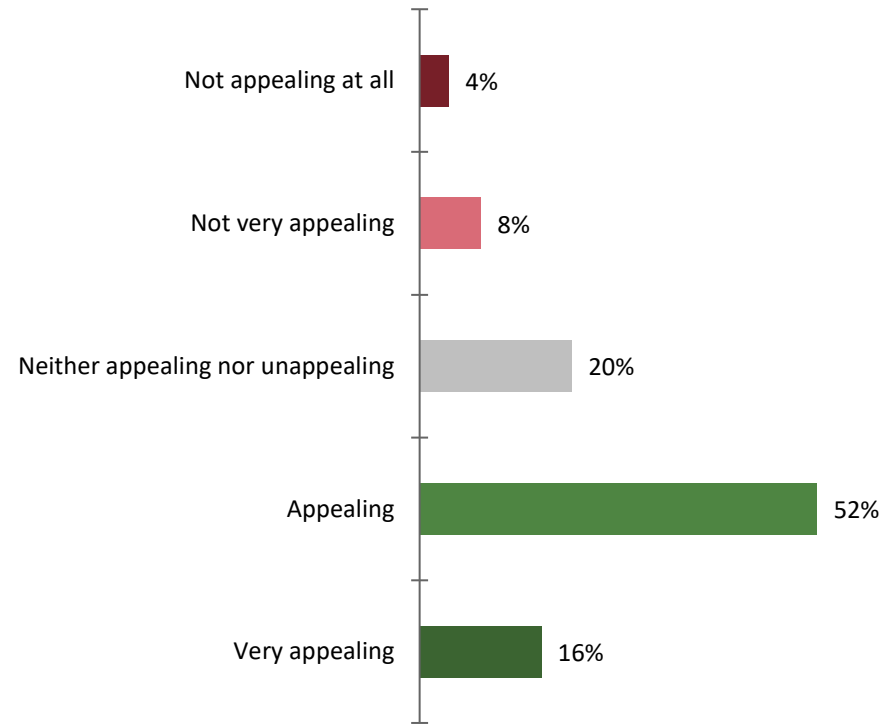
Please rank the 3 concepts, where #1 is the concept you most prefer.
n=1003; 363



- Overall, the Tas Net Zero program is considered appealing by a majority with 52% finding the three programs appealing and 16% very appealing
 - Appeal was stronger with Tas intenders, double the proportion for ‘very appealing’

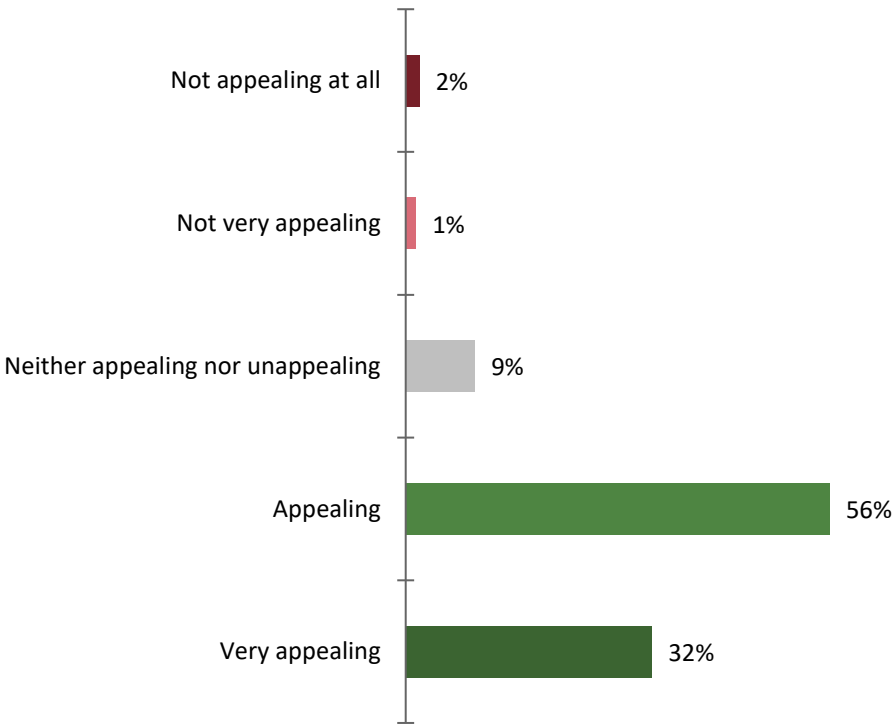
Appeal – Total leisure travellers

Overall how appealing are the 3 program concepts to you?
n=1003



Appeal – Tas Intenders (post Tas Net Zero)

Overall how appealing are the 3 program concepts to you?
n=363



Reasons for appeal

Overall how appealing are the 3 program concepts to you? Very appealing + appealing
n=680

Doing something for the environment drives appeal

- *'This program is appealing because it helps protect our country for our future generations to be able to enjoy'*
- *'I am very happy to contribute in any way to protect environment'*
- *'It's great for the environment and doing my bit when visiting a beautiful place'*

Environmental protection concept particularly sparks interest

- *'I find the environmental protection program very appealing. The ability to interact with nature and learn is great.'*
- *'I love the environment protection aspect of this'*

Appreciation for Tasmania to provide such an opportunity to travellers

- *'It's great to see Tasmania coming up with interesting ways to help people fight the impact of climate change'*
- *'It offers practical ways that tourists can play a positive part in protecting the environment in Tasmania'*
- *'Great concept to reduce carbon footprint in a beautiful state'*

...which also drives interest in visiting Tasmania

- *'I was not aware that Tasmania was taking these steps to protect their environment, and it makes me now want to include Tasmania as a place to visit'*

Reasons for lack of appeal

Overall how appealing are the 3 program concepts to you? Not very appealing + not appealing at all
n=122

Disinterest and other priorities

- *'When I am on holiday, I am on holiday. Not downloading apps and doing tasks'*
- *'I am just not that interested'*
- *'Because whilst on holiday I just want to have a total break. I don't want to stress about the environment which I deal with at home'*

Financially unappealing

- *'Seems very money driven and would almost seem like it's pressure to make donations'*
- *'I would not pay for this at all. I'd rather use the money on other aspects of the holiday'*

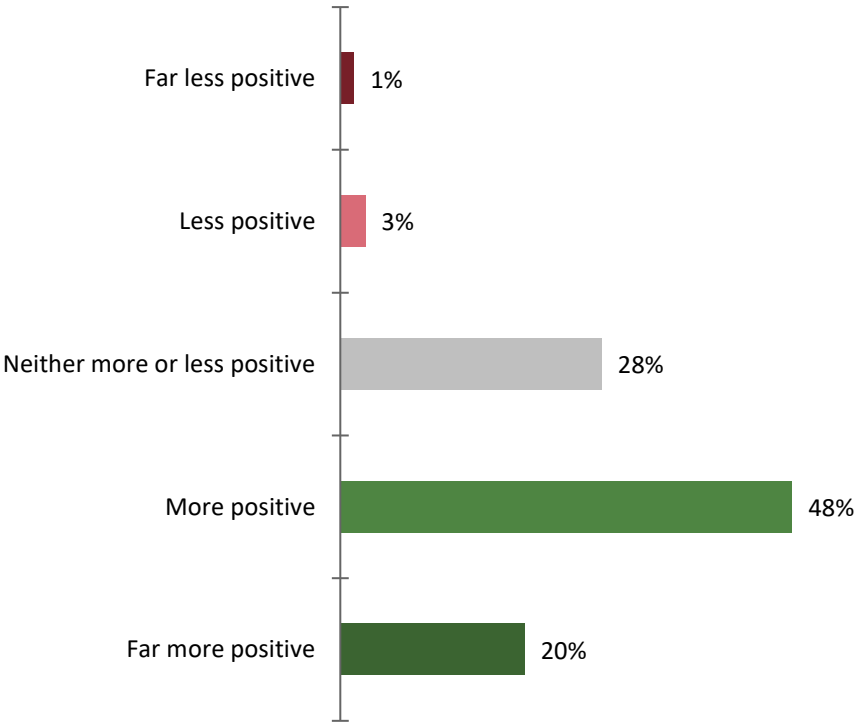
Distrust & Scepticism

- *'I'm just not interested in sustainability - too much false information in existing programs'*
- *'Offsets is a scam; low emission trip planner is good, environmental protection is okay'*
- *'I find carbon offsets are usually just a numbers shuffling game to make people think they're doing right by the environment'*

- **As a result of these concepts, ~68% had a more positive impact on Tasmania as a state, 20% far more positive**
 - Again clearly stronger with intenders
- **Minimal negative impact**

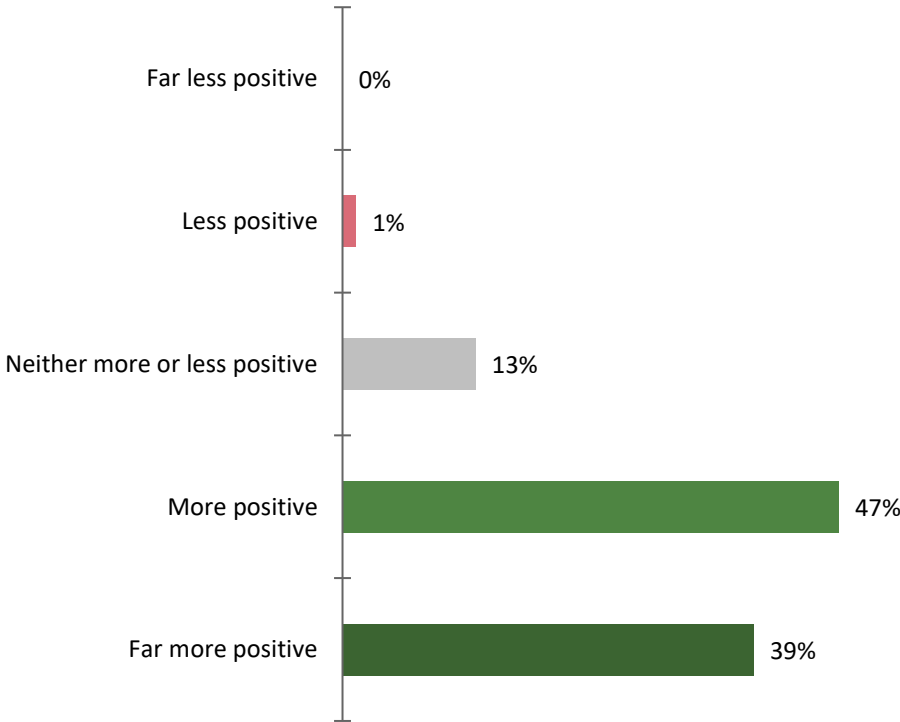
Impact – Total leisure travellers

Overall do the 3 program concepts make you feel more or less positively about Tasmania as a state?
n=1003



Impact – Tas Intenders (post Tas Net Zero)

Overall do the 3 program concepts make you feel more or less positively about Tasmania as a state?
n=363



Reasons for positive impact

Please briefly explain why the concepts make you feel more positive or far more positive about Tasmania
n=635

Tasmania's focus on sustainability appreciated

- *'I really liked how Tasmania prioritizes sustainable practices throughout the tourism industry.'*
- *'Tasmania's commitment to environmental protection is truly commendable. It's inspiring to see a place so dedicated to sustainability.'*
- *'Tasmania's environmental initiatives give me hope for a more sustainable future..'*
- *'It's great to see a place like Tasmania taking such a strong stance on environmental protection'*
- *'The focus on renewable energy in Tasmania is impressive. It's encouraging to see a shift towards a more sustainable future'*

Knowing about the offerings had a positive impact

- *'The educational programs offered by Tasmania really opened my eyes to the environmental challenges the island faces.'*
- *'Tasmania's environmental programs really highlight the importance of protecting our natural world. It's a message that needs to be heard by everyone.'*
- *'The signage and information provided by Tasmania's environmental initiatives were clear and informative. I learned a lot!'*
- *'It's great that Tasmania offers educational programs for visitors about their environmental efforts. It fosters a sense of understanding and appreciation'*

The opportunity to contribute to a positive environmental cause is appealing

- *'It makes you feel good about your holiday and changing the world'*
- *'Because its a long trip from where I live and its nice to know that there are programs that will benefit the environment to offset my personal travel/enjoyment'*
- *'Knowing a portion of my tourism dollars goes towards environmental initiatives makes this trip even more enjoyable.'*

Previous positive experiences

- *'I learned so much about sustainable practices during my visit to Tasmania. I'm excited to incorporate these new habits into my everyday life'*
- *'Tasmania's focus on sustainability actually made my trip more enjoyable. It felt like I was truly experiencing the island in a responsible way.'*
- *'The initiatives made it easy for me to be a responsible tourist. There were plenty of opportunities to minimize my environmental impact.'*
- *'Tasmania has made it very easy for visitors to make sustainable choices. From recycling programs to eco-friendly transportation options, everything was well thought-out.'*

Tasmania's current beauty a testament

- *'Tasmania's environmental programs are clearly having a positive impact. The wildlife is thriving and the scenery is breathtaking.'*

- **Note: Only a small proportion (4%) felt that the program had less positive impact, hence the results below are a summary from this small sample**

Reasons for less positive impact

Please briefly explain why the concepts make you feel less positive or far less positive about Tasmania
n=40

General disbelief in the importance of environmental issues and programs

- *'Offsets are a scam'*
- *'I don't buy into the whole emissions stuff. Its unquantifiable, you can't see it and its another ploy to tax people more money in the name of going green.'*
- *'It is just a cliché, to appeal to the clueless inner-city elites, naïve and uneducated of which I am none. I am a real environmentalist'*

Distrust of government motives

- *'Another revenue raising scheme to make me pay more is never going to appeal'*
- *'Nobody is game to do anything for fear of upsetting Greens.'*
- *'Sounds like a tax on holiday visitors to offset government incapacity, just another tax'*

Some feel the initiatives might make visiting Tasmania more difficult, stressful, or expensive

- *'Because I feel like I am being judged and that my current efforts aren't enough'*
- *'It makes me feel guilty about travelling and less likely to visit Tasmania'*
- *'I feel like they might try and guilt trip people into supporting these programs'*
- *'It makes me believe that I will be judged for not being environmentally friendly when visiting'*

Lack of clarity about the initiatives

- *'There is nothing environmentally friendly about electric cars, especially in Tasmania. Please correct your program information'*
- *'Seems to be participating in the climate change delusion rather than genuine conservation'*

General lack of enthusiasm for the initiatives

- *'I do not feel much positive'*
- *'I don't like any of the options much.'*

Change in Intention - Post Net Zero Program stimulus



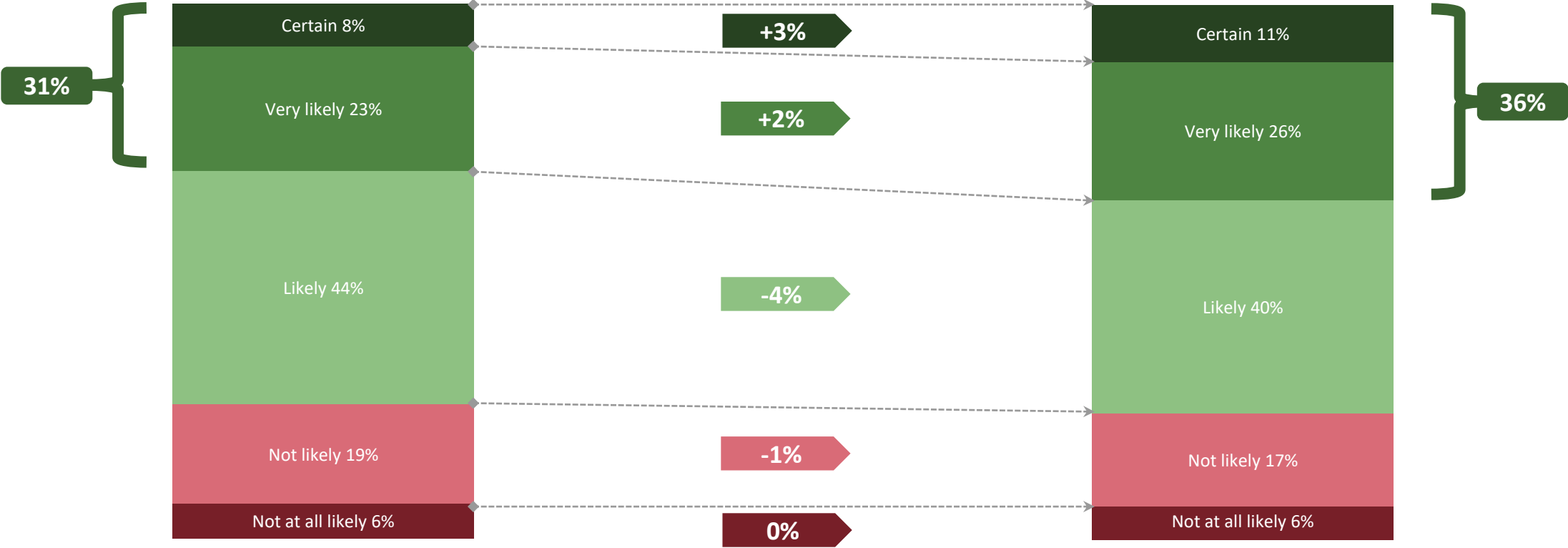
- There was an increase in the likelihood to visit Tasmania as a result of the Tas Net Zero concepts, 11% now certain to visit Tasmania for leisure in the next 2 years and 26% more likely, up 3% and 2% respective from pre-stimulus

Pre-Stimulus Likelihood to visit Tasmania

How likely are you to visit Tasmania for a leisure trip in the next 2 years?
n=1003

Post-Stimulus Likelihood to visit Tasmania

How likely are you now to visit Tasmania for a leisure trip in the next two years?
n=1003

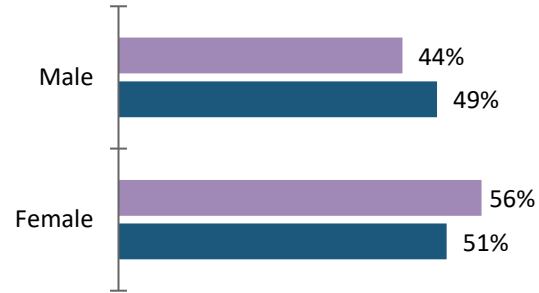


Demographic profile of Net Zero Intenders

- Net Zero Program intenders are more likely than average to be younger (particularly 18-29 or 40-49), families with young children well above average
- They are also more likely to be working full time and earning higher incomes

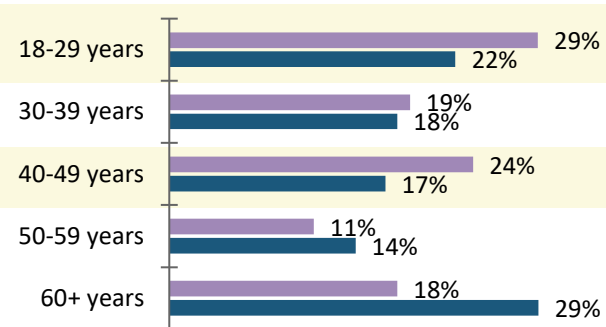
Gender

n=281; 1003



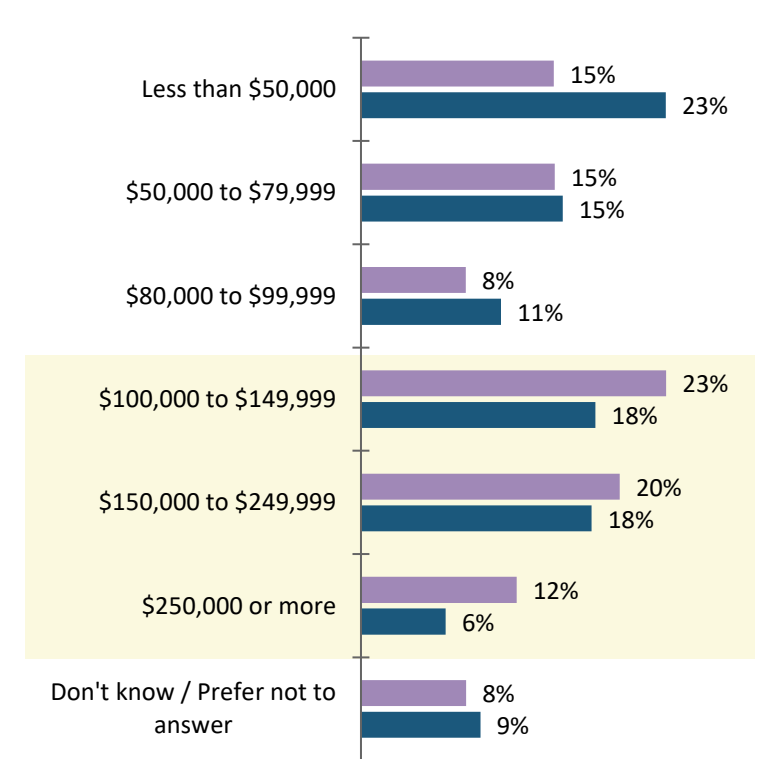
Age

n=281; 1003



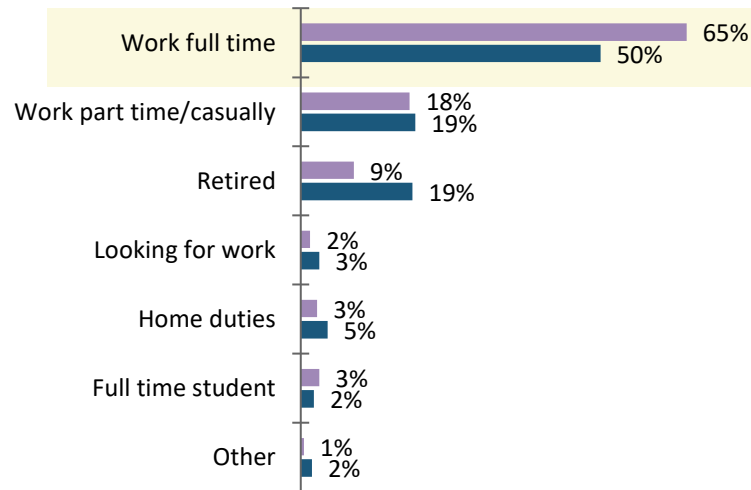
Income

n=281; 1003



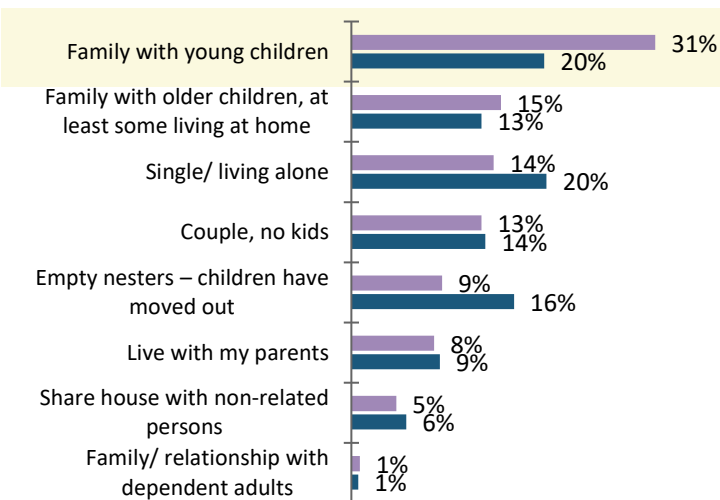
Occupation

n=281; 1003



Household situation

n=281; 1003



Net Zero Intenders*
Total leisure travellers

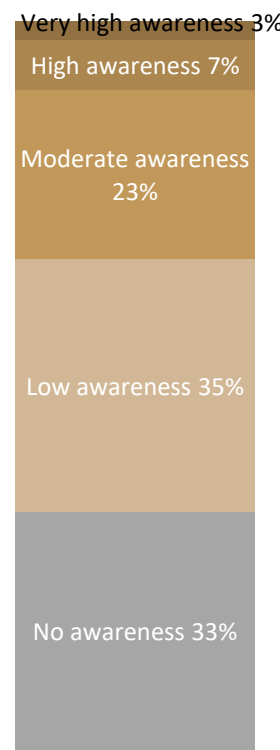
- Stimulus
- Awareness of achievements
- Appeal, relevance and credibility
- Most preferred achievements

- 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.

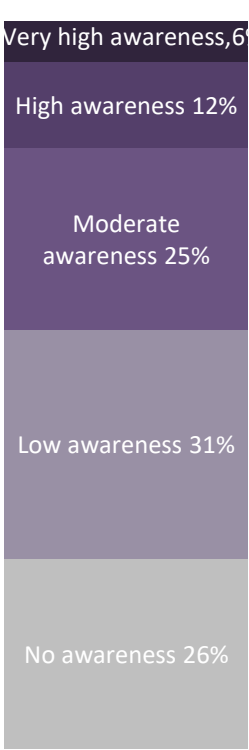
- **Awareness of Tasmania’s achievements is low**
 - 9% had very high or high awareness of Tasmania’s achievements before reading the information, 17% of intenders
- **Making enough clean power to meet the states’ electricity needs is most known achievement**
- **The first state to receive 100% renewable energy and having one of the world’s largest carbon sinks also prominent**

Awareness
Before reading this information, how aware were you of this information?
n=1003; 400

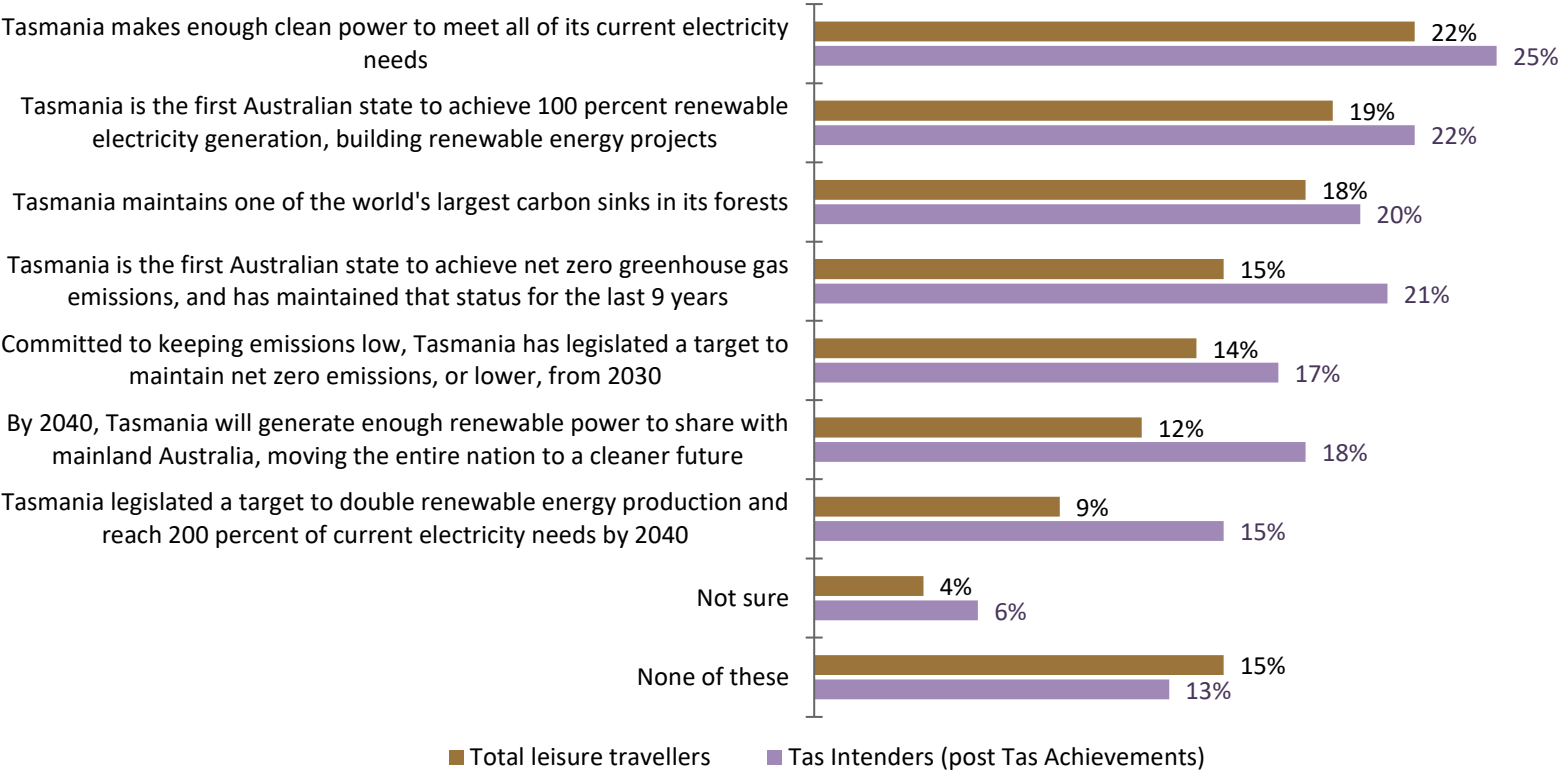
Total leisure travellers



Tas Intenders



Awareness of achievements prior to reading
Before reading this information, which of the following were you aware of?
n=1003; 400

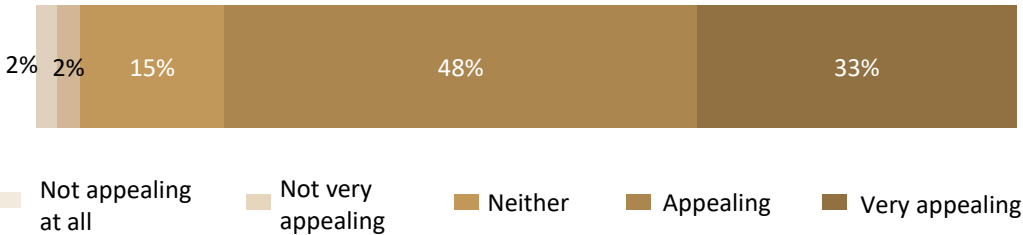


- Strong appeal for Tasmania’s achievements, with 81% finding the achievements appealing and almost all Tas intenders
- ~2/3 thought the achievements were relevant, 82% of intenders

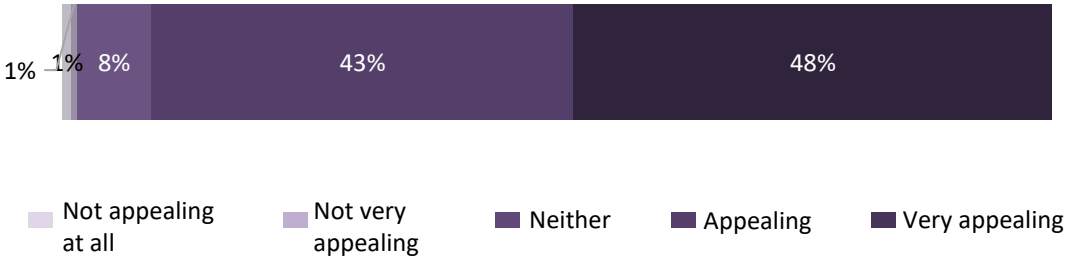
Appeal

When considering the previous points related to Tasmania’s climate actions and renewable energy, how appealing do you find these points?
n=1003; 400

Total leisure travellers



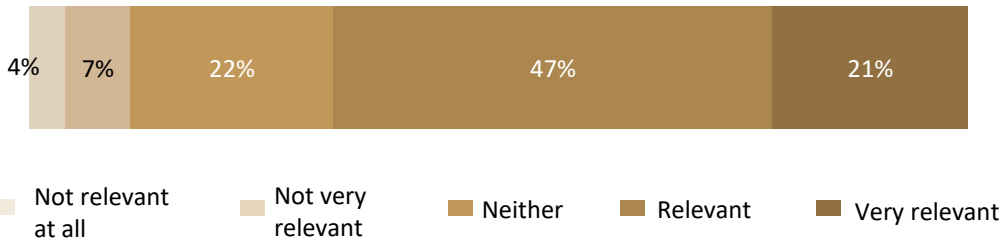
Tas Intenders (post Tas achievements)



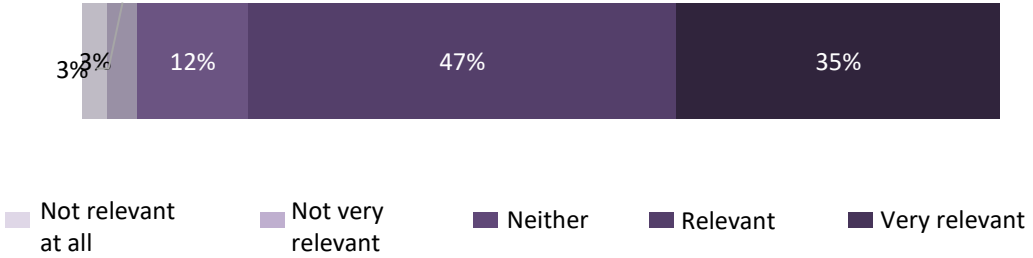
Relevance

When considering the previous points related to Tasmania's climate actions and renewable energy, how relevant are these points to you and your life?
n=1003; 400

Total leisure travellers



Tas Intenders (post Tas achievements)



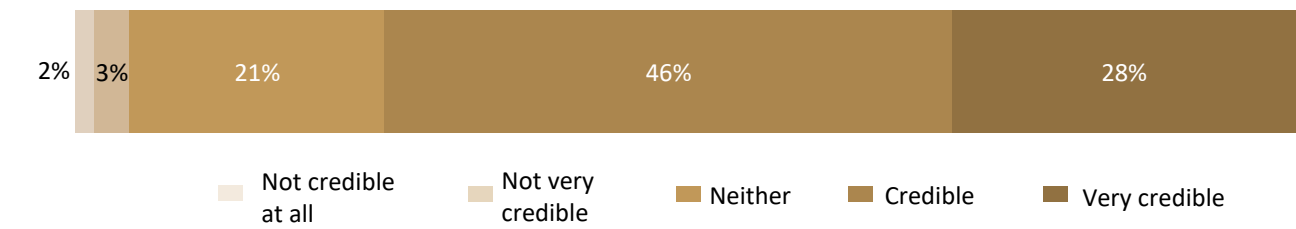
- Credibility was also high with almost 3/4 found the points credible or very credible and the vast majority of Tas intenders

Credibility

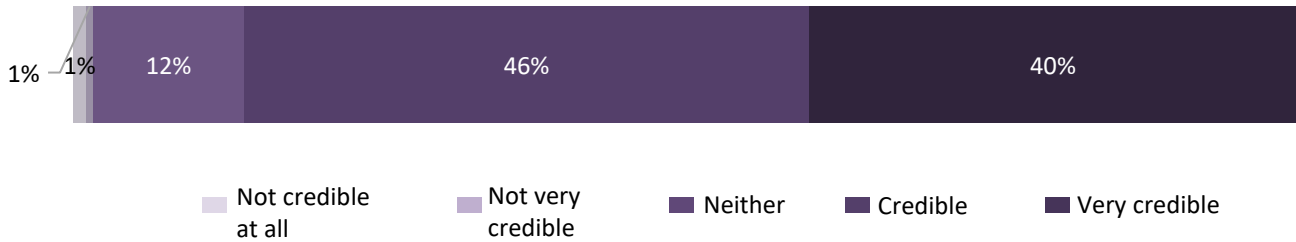
When considering the previous points related to Tasmania's climate actions and renewable energy, how credible do you find these points?

n=1003; 400

Total leisure travellers



Tas Intenders (post Tas achievements)



Reasons for finding Tas Achievements credible

Please briefly explain why you find these points credible or very credible
n=745

Tasmania praised for being a front-runner

- *'Tasmania is at the forefront in Australia and the world in terms of sustainability'*
- *'Tasmania is proving to the other states that it is possible to achieve net zero without coal'*
- *'Great to see Tasmania leading the pack in net zero and decarbonization'*
- *'Tasmania is leading by example'*

...and for the positive impact it has on the environment

- *'Its good that they are doing something about climate change'*
- *'Taking climate action will ensure that future generation continues enjoying the resources that we have'*
- *'I believe in protecting the environment and bio diversity'*
- *'Great to hear that they are taking environmental sustainability seriously, as it is a beautiful state'*

Sustainability initiatives increased appeal of Tasmania

- *'I am planning to move to Tasmania and this is one of the reasons why'*
- *'It makes me believe that Tasmania tourism has a strong sense of protecting the environment'*

Feelings of hope and inspiration due to Tasmania's success

- *'It gives people hope in that net zero is achievable'*
- *'Inspiring to see how committed Tasmania is to renewable energy'*

...highlighting the need for call to action for other states

- *'Maybe other states can follow how Tasmania are doing their best to lower emissions'*
- *'It sets a benchmark for other states'*
- *'It's very inspiring to see a state in Australia being at the fore front of sustainability and clean energy. It's a great example to other states and countries'*

Reasons for finding Tas Achievements not credible

Please briefly explain why you find these points not credible at all or not very credible
n=44

A significant portion of the responses expressed a lack of interest in sustainability efforts or the topic altogether:

- *'Not interested in sustainability'*
- *'Of absolutely no interest to me whatsoever'*
- *'Not appealing to me & my habits.'*

Some responses criticized the focus on renewable energy, suggesting other environmental issues or economic concerns deserved more attention:

- *'There are other polluters from these 'green measures' and wind farms kill many native birds so they do more harm than good'*
- *'Too focused on carbon offsets'*

Few disliked the way sustainability efforts were communicated

- *'It seems a bit confusing and pushy'*

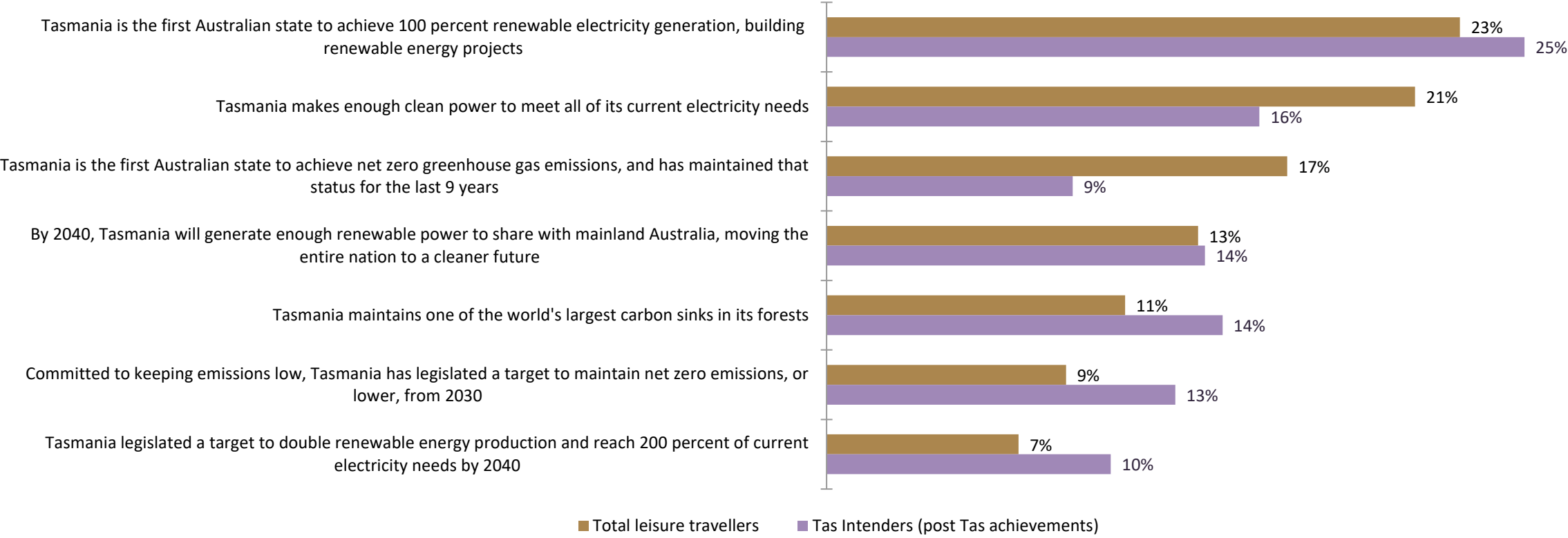
Most Preferred Points



- In terms of preference, Tasmania being the 1st state to achieve 100% renewable energy ranked #1, followed by enough clean power generation to meet all of its current electricity needs
- Net zero greenhouse gas emissions achievement 3rd in the list overall, though one of the worlds largest carbon sinks was stronger for intenders
- Legislated targets had lower preference

Most Preferred Points – Rank 1

Please rank the following points in order of preference, where #1 is the point that you value highest.
n= 1003; 400

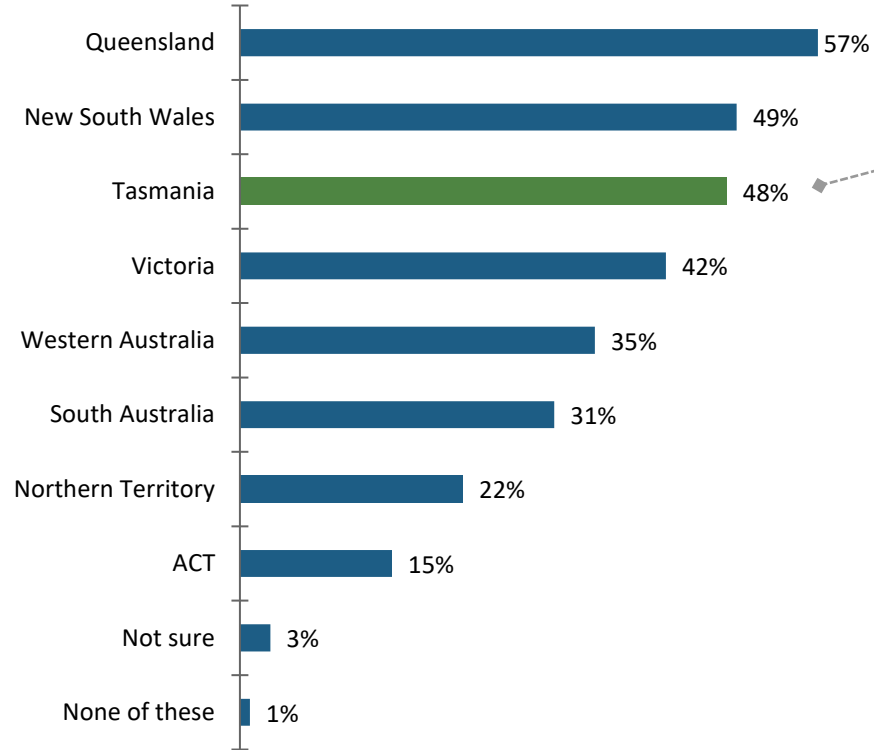


- Impact on consideration
- Impact on intention
- Statements and risks

- Strong lift in relative consideration for Tasmania as a result of the Tas Net Zero program and Tas achievement information
- Travel consideration for Tasmania lifted 21% pts to 69% consideration and now ranked #1

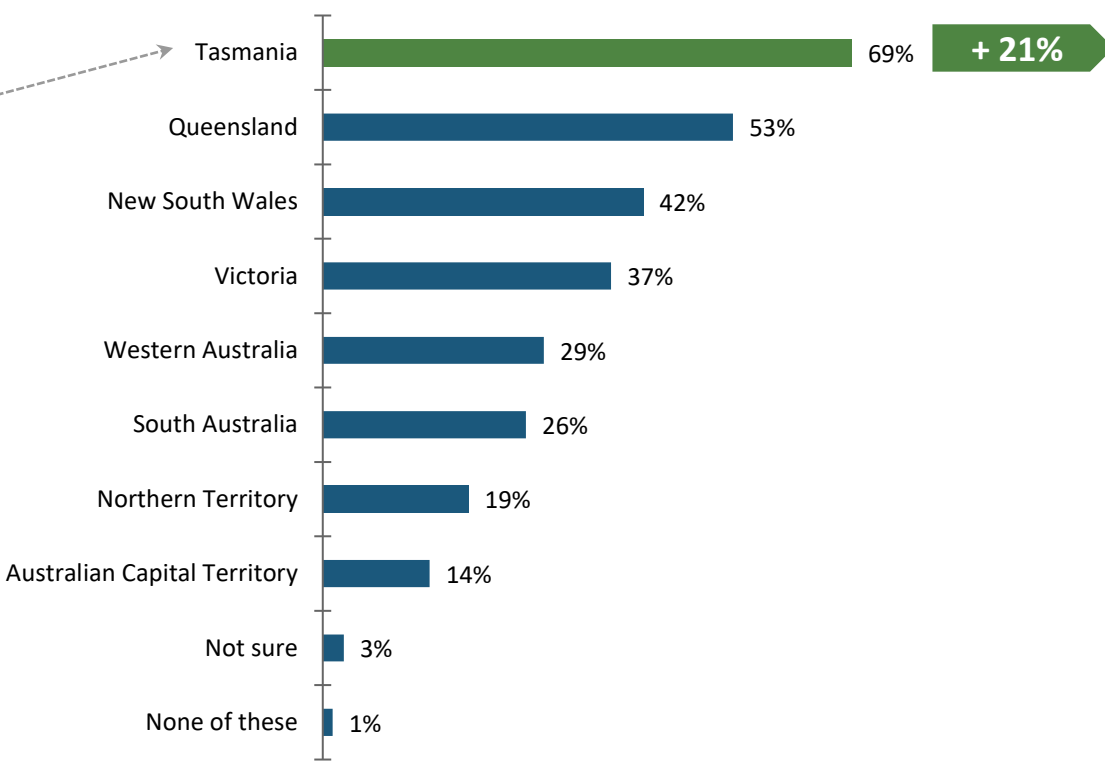
Travel consideration in next 2 years - Pre

Which of the following states or territories are you considering travelling to for leisure in the next 2 years?
n=1003



Travel consideration in next 2 years - Post

Which of the following states or territories are you considering travelling to for leisure in the next 2 years?
n=1003



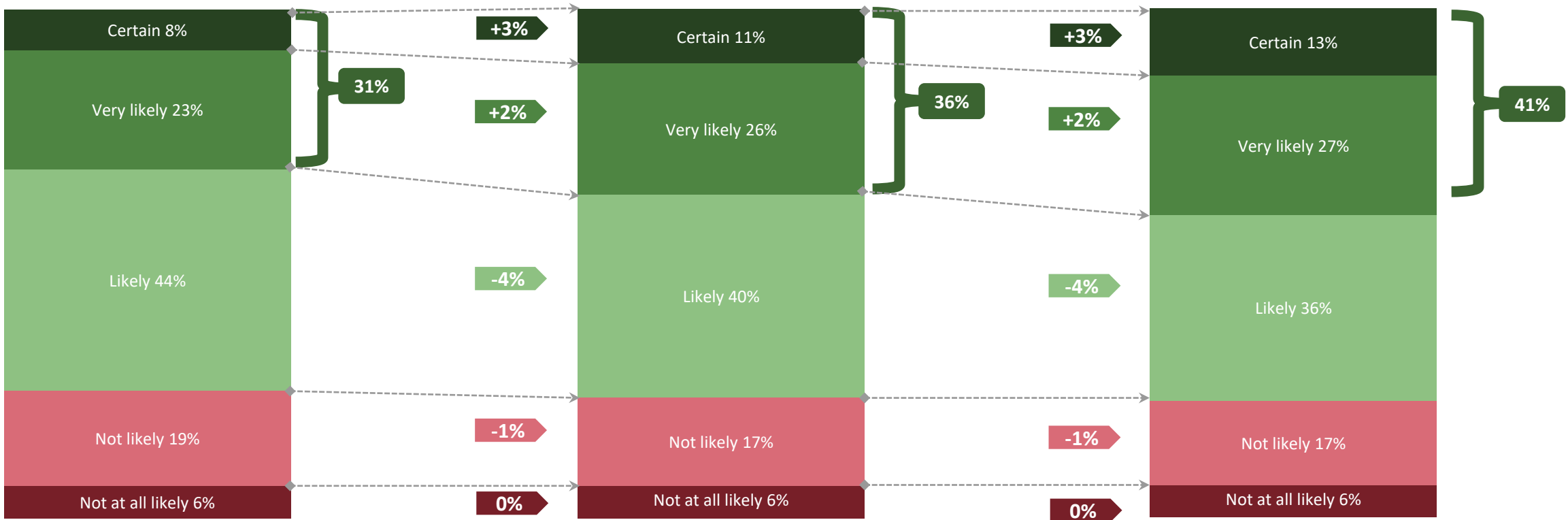
Overall shift in Intention

- Overall intention lifted 9% pts with 13% more certain and 27% more likely to visit Tasmania for a leisure trip in the next 2 years
- The increase was quite evenly split between the Net Zero Program and the further addition of the Tas achievement information

Likelihood to visit Tasmania - Pre-Stimulus
How likely are you to visit Tasmania for a leisure trip in the next 2 years? n=1003

Likelihood to visit Tasmania – Post Tas Net Zero
How likely are you now to visit Tasmania for a leisure trip in the next two years? n=1003

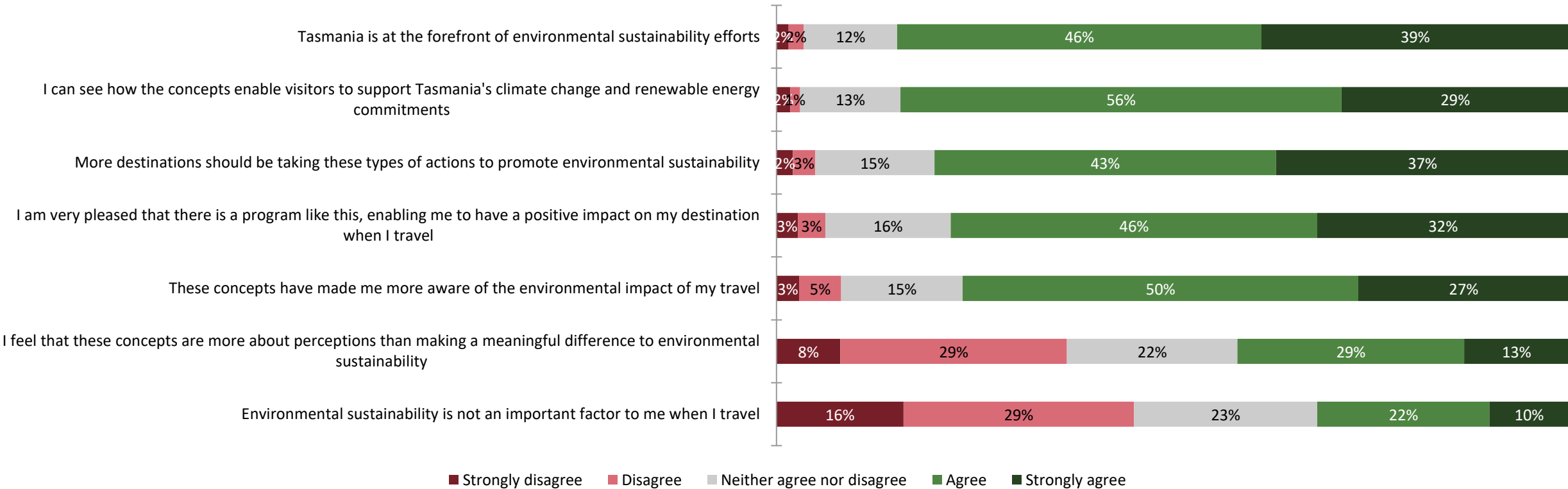
Likelihood to visit Tasmania – Post Tas Achievements
How likely are you now to visit Tasmania for a leisure trip in the next two years? n=1003



- **A generally positive response to Tasmania after viewing all information**
 - Tasmania is at the forefront of environmental sustainability efforts the most agreed upon statement, with the vast majority agreeing
 - Most also support the program, can see how it enables visitors to contribute and believe more states should follow suit
- **~3/4 are more aware of the environmental impact of travel**
 - Mixed response to statements around the actions being more about perceptions and sustainability not being important

Statements – Total leisure travellers

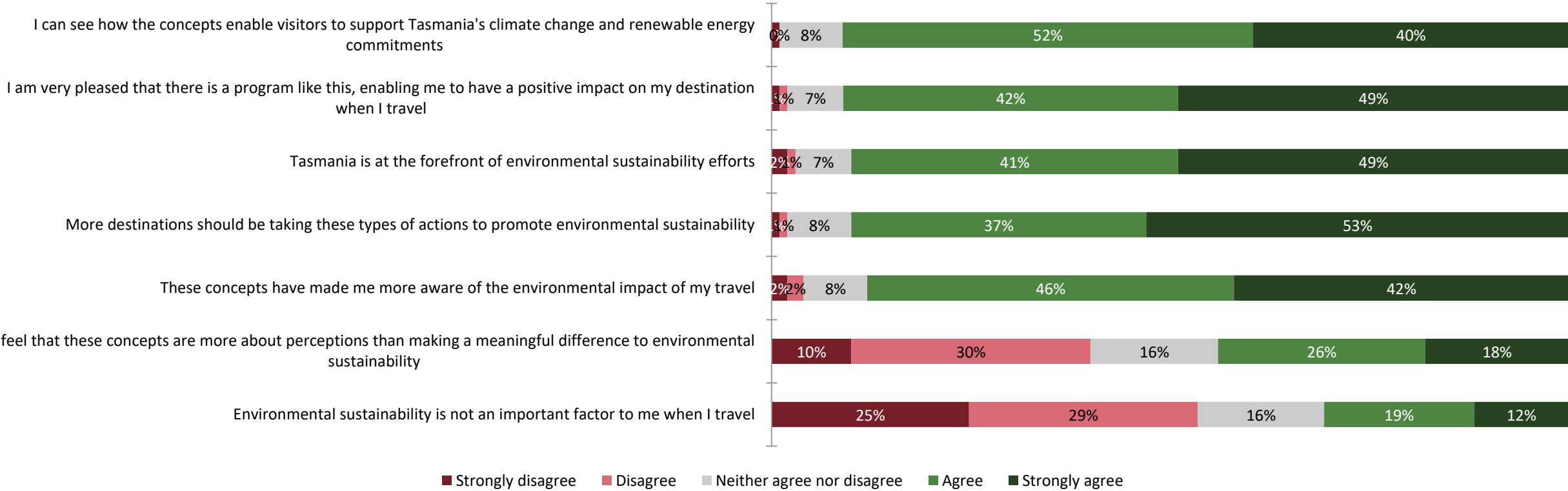
From all of the information you have seen in this survey, please respond with how much you now agree with each of the following statements
n=1003



- **A very positive response to Tasmania among Tas intenders**
 - Strongest agreement for statements supporting the program and the belief that others should take these types of actions
- **Most are also more aware of the environmental impact of travel**
 - Again a mixed response to statements around the actions being more about perceptions and sustainability not being important, though fewer Tas intenders agree with these statements

Statements – Tas Intenders (post Tas Achievements)

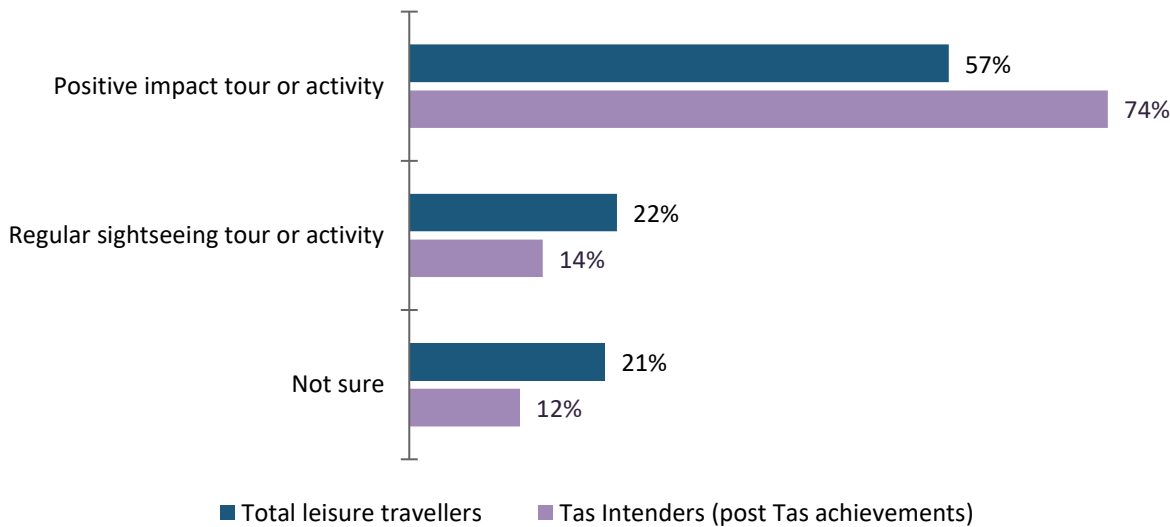
From all of the information you have seen in this survey, please respond with how much you now agree with each of the following statements
n=400



- Over half are more likely to choose the positive impact tour or activity when given the choice
 - Up to nearly ¾ of Tas intenders

Regular sightseeing vs positive impact tour/ activity

If you were booking a tour in Tasmania with a tourism operator and had the choice between a regular sightseeing tour/ activity or a positive impact tour/ activity, which option would you choose?
n=1003; 400



Note:

For the purpose of this questionnaire, examples of a potential positive impact tour include

- a walking tour that includes visitors taking part in a wildlife survey activity,
- a sightseeing tour that includes a short beach clean up activity,
- a sightseeing tour that uses low emissions transportation options (i.e. electric-powered vessel, e-bikes)

- **Current status**

- Environmental sustainability is important to the majority of the population, particularly those intending Tasmania
 - It is somewhat less important however for holidays and ranks below a range of other factors when decisions are being made
 - Reducing waste, protecting local wildlife / environment of the destination are the most important factors, more so than minimising carbon footprint
- Tasmania is strongly perceived for environmental sustainability, clearly the leading state
- There is substantial distrust in carbon offset programs with relatively few regularly participating
 - There is a clear desire here for greater transparency, evidence of effectiveness and regulation

- **The Tasmanian Net Zero Program**

- The program was well received overall, considered appealing (particularly among Tas intenders) and has a clear positive impact on perceptions of Tasmania
- All three concepts of the program had appeal but 'Environmental Protection' was most preferred, followed by 'Low Emissions Trip Planner'
 - The Carbon Offset was less preferred with hesitancy to spend and lack of trust in offset programs contributing

- **Tasmania's Climate Achievements**

- While few had strong awareness of Tasmania's climate achievements, they had strong appeal (particularly among those interested in Tasmania)
 - Achievement of 100% renewable energy and the generation of enough clean power to service Tasmania's electricity needs had most impact
- The state was seen as highly credible in stating these achievements

- **The impact**

- Competitive consideration clearly increased after the Net Zero Program and Tas Climate Achievements were introduced
- Intention to visit Tasmania also increased after both stages indicating greater demand potential

- **The risks**

- While some had concerns about greenwashing and many were more aware of their carbon footprint from travel as a result of the program, there was little evidence of a negative impact on the perceptions of Tasmania and the positives appeared to outweigh the negatives
 - Association with untrusted carbon offset programs did also not appear to have a clearly negative impact, however the clear consumer concerns here are worthy of consideration in execution

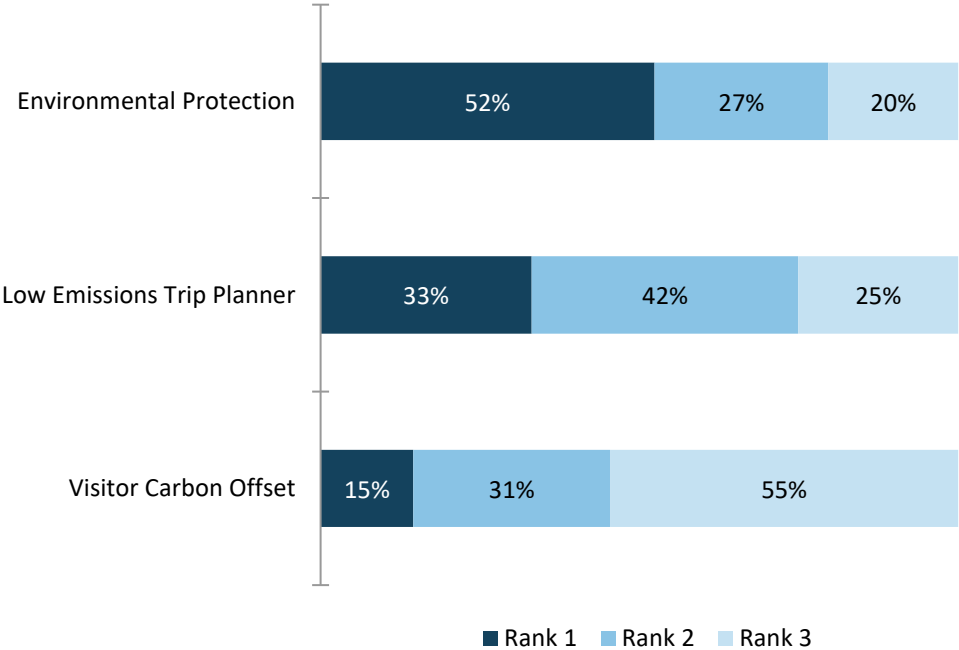
- **The Net Zero Program and Tasmania's climate achievements have the potential to have a positive impact on Tasmanian perceptions and demand**
 - Though for this to be achieved the program / communication of achievements need to be effectively executed and potential visitors need to be aware of the key elements
- **Tasmania is uniquely positioned to implement the program and aligning the program with experiences that represent the core appeals of Tasmania is likely to provide the greatest consumer opportunity**
 - Environmental sustainability was seen to align strongly to the state of Tasmania
 - The state is already highly regarded and was seen to have substantial credibility in this area
 - The elements of the Net Zero Program that drove the consumer appeal most were the opportunity to engage with highly appealing Tasmanian experiences that also have sustainability benefits e.g. engaging with local products, Tasmanian food and wine and the natural environment
 - Many of these factors are key drivers of holiday decisions and when combined with a positive environmental story, the impact is likely to be maximized
- **The carbon offset element of the program, while not rejected by the majority, did have less appeal and does expose the program to an area of some consumer distrust**
 - Hence, a lower emphasis than other elements of the program may be most effective
 - In terms of the carbon offset execution itself, alignment with Tasmanian based programs, providing consumers with control over the contribution and clear transparency and evidence of effectiveness are the factors likely to achieve most consumer acceptance

- Launch preference
- Credibility points by trust in carbon offset programs

- ~1/2 rank environmental protection as the first concept to launch, followed by low emissions trip planner and visitor carbon offset concepts
 - Largely in line with concept preference

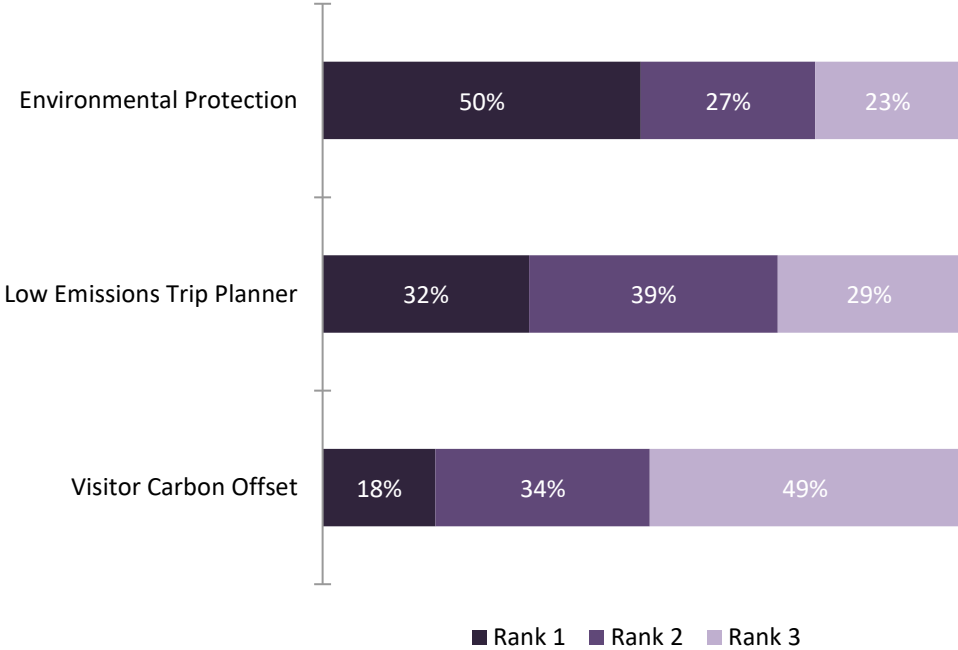
Launch Preference – Total leisure travellers

If you were planning the launch of these 3 concepts, in what order would you launch them? Please order the 3 concepts, where #1 would be the first concept launched and #3 would be the last.
n=1003



Launch Preference – Tas Intenders (post Tas Net Zero)

If you were planning the launch of these 3 concepts, in what order would you launch them? Please order the 3 concepts, where #1 would be the first concept launched and #3 would be the last.
n=363



- **Credibility is lower amongst those who have no trust in carbon offset programs**
 - ~30% who don't trust carbon offset programs also gave low credibility points to Tasmania's climate actions and renewable energy points
 - Still more positive than negative scores for credibility across the board though

Credibility of Tas Achievements x Trust in offset programs

When considering the previous points related to Tasmania's climate actions and renewable energy, how credible do you find these points? By To what extent do you trust that the money that is paid to offset travel is genuinely used to effectively offset carbon emissions?
n=1003

	No trust at all (n=125)	Low trust (n=248)	Moderate trust (n=369)	High trust (n=135)	Complete trust (n=49)
Not credible at all	10%	0%	0%	0%	0%
Not very credible	19%	1%	0%	0%	0%
Moderately credible	25%	28%	20%	11%	8%
Credible	39%	47%	52%	42%	31%
Very credible	7%	23%	28%	47%	62%