

LAUNCESTON

Destination Action Plan 2016–2018

October 2016

Acknowledgments

The development of the Launceston Destination Action Plan has been facilitated by Tourism Northern Tasmania (TNT) with the support of the Department of State Growth (DSG).

The process brought together representatives from all stakeholder groups that benefit from the visitor economy; local government, state government agencies, industry and the community to develop a plan. This Plan seeks to identify the challenges and opportunities facing the Launceston region and to establish achievable affordable priorities that if delivered would increase the destination's competitiveness.

This is an action focused plan that identifies specific priorities and actions that if cooperatively acted on by stakeholders will contribute to the achievement of agreed objectives in the short term (rolling three years). As such the Plan does not purport to be a comprehensive strategic plan but is deliberately focused on identifying the key challenges and opportunities facing the destination and to establish achievable and affordable priorities and actions to address them. It is a plan driven by the broader community (business and residents) while being cognisant of State and regional strategic plans and programs.

Tourism Northern Tasmania would like to thank all who participated in the plan development process:

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Launceston Destination Action Plan Working Group

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Images used within this document are courtesy of Tourism Tasmania, Tourism Australia, Rob Burnett, Josef Chromy Tasmania, QVMAG at Royal Park, Chris Crerar, Sean Fennessy, Ron Brown Photographics, QVMAG at Inveresk, Rick Eaves, Saint John Craft Beer, Black Cow Bistro, Melinda Ta, Amelia Espresso, City of Launceston, Masaaki Aihara, Flow Mountain Bike, Sweet Brew, Pete Harmsen.



Introduction

This Destination Action Plan for Launceston identifies priority strategies and actions which if implemented over three years will enhance Launceston's position as the Northern gateway to Tasmania. Destination Action Plans are an implementation initiative of the Tasmanian Visitor Economy Strategy 2015-2020 (T21), Priority #4 Building capability, capacity and community.

This Plan has been prepared by a facilitated workshop process involving business and community representatives who considered and reached consensus on tourism development, marketing and management opportunities and challenges. The group identified and agreed on the key priorities and actions that will make a positive difference to the growth and sustainability of the Launceston visitor economy and experience.



Destination Launceston

Launceston is a highly appealing destination for both domestic and international travellers offering fine food, creative arts and cultural experiences. The City is renowned for its stunning heritage architecture from the colonial period through Victorian to C21st modernism. It is one of the most comprehensively intact heritage cities in Australia.



Objectives

The common objectives for tourism are:

1. To increase visitor numbers
2. To increase visitor length of stay (yield)
3. To increase visitor expenditure
4. To increase visitor dispersal (geographically and seasonally)
5. To increase visitor satisfaction.

The visitor economy

Visitors to Greater Launceston are substantial contributors to the local economy. Visitors include leisure tourists (intrastate, interstate and international), visitors to friends and relatives, business visitors, students and day trippers. Their expenditure is 'new money' contributing to the local economy which supports jobs, real estate value and the provision of services, facilities and activities in the community.

Tourism contributes \$667 million annually to the Launceston and Northern region, accounting for nearly 3,649 direct jobs.

Year ending June 2016 Launceston and the North attracted a total of 620,300 (53% all visitors to Tasmania) interstate and international visitors:

Launceston City	502,462
Other Northern	117,838

Average length of stay:

North	4.4 nights
Launceston City	3.9 nights

Intrastate visitation to North comprises:

334,000 trips (149,000 holiday trips)
616,000 nights (287,000 holiday nights)

Direct Gross Regional Product

- Interstate and international visitors spent \$529 million in the North.
- Intrastate visitors spent over \$138 million in the North.

The tourism industry in Northern Tasmania provides a significant contribution to the State's tourism sector in terms of output, employment, wages and salaries and other economic indicators (Economic Impact Analysis in Northern Tasmania 2013):

- Tourism sector represents 7.5 % of total employment in Northern Tasmania (approximately 3,649 jobs);
- Major tourism related industries are accommodation and food services, with employment concentrated in the Launceston area.



Our 'post card' or 'Instagram' would feature the following images:

- Launceston's stunning heritage architecture – a standout feature
- Arts/culture
- Food, wine, 'hipster' coffee, Harvest Market, fresh produce, premium food, cheese, vineyards
- Cataract Gorge
- Junction – crowds of people
- The Valley, vineyards, Tamar River
- Mountain biking trails & rides.



What we do well

- Boutique and authentic experiences
- Quality Tasmanian dining at every level from fine dining to food trucks, casual elegant dining and contemporary Tasmanian cuisine
- Produce, Harvest Market – engaged locals
- Great wines, premium beverages, including whiskey
- Access to 'Meet the Maker' – artists & artisans, craft brewers, distillers, winemakers
- Built heritage & architecture, well maintained, used and loved
- Events – including: Effervescence, Festivale, Footy, Launceston 10, Junction, Pinot & Truffles, Enduro World Series MTB, Artentwine, BOFA, = moderately well!
- We are proud, (parochial)
- Theatre
- Parks & gardens – centrally located
- Ease of travel, driving/parking etc.
- UTAS redevelopment, partnerships, innovation
- Natural assets
- Proximity to Tassie's icons (hubs and spokes) – UNESCO heritage sites, 45 minute radius
- Fully serviced city in a regional town (airport, hospitals, university, TAFE, major shopping centre).



Our challenges

- Creating a Launceston brand – perception as a regional/provincial town – hard to get to know
- Consistency of quality service – access to trained staff
- North vs. South – regional dispersal
- The North has a lack of confidence in the economy/investment
- Developments not easy to do – too much 'red tape'; too many road blocks from the higher policy areas
- Theatre producers/event managers face similar obstacles
- Lack of collaboration – there is no single vision to aspire to
- Protest culture (the 'knockers')
- Economies of scale – very small, lack of critical mass
- Access to an 'island' can be a limitation/constraint
- Hobart continually reinforced as a capital city/entry point and financially advantaged over North by bureaucrats
- Launceston – 7 councils with 7 visions = 7 different directions.



Our opportunities



- Create a Launceston brand that locals will be proud to embrace and endorse
- Further developing our arts & cultural activities and events, particularly aligned with urban renewal projects to increase walkability, connectivity, vitality and engagement
- Utilising key infrastructure such as Museum, QVMAG
 - QVMAG collections outstanding in Australia (e.g. colonial paintings)
- Hawks (\$4m per annum investment) – create activities pre/post games to extend stay, extend yield
- Evolution of events – a broader event strategy particularly for off peak
- Considered development of the Cataract Gorge to improve the experience and enhance the setting (tired)
- Improved infrastructure at York Park stadium – to meet visitor needs and expectations
- Greater utilisation of the easy accessible walks, nature, MTB, rides, water and rivers
- Leverage partnerships with Hobart, Burnie & Devonport – consider as partners not competitors
- UTAS partnership – entrepreneurial opportunities, visiting friends and relatives (VFR) market, incubator for innovation
- Consult with the Indigenous community in the north, to better understand and represent both ancient and contemporary Aboriginal culture.



Destination Action Plan management and oversight

The Leadership Team has agreed to remain as the 'active' group for the management and oversight of the Plan. The group is a broad cross section of highly respected professionals and business/ community leaders representing various sectors, businesses and organisations within Launceston and surrounds. The Leadership Team will meet on a needs basis and or approximately four (4) times each year to review progress, identify emerging issues and trends and to communicate progress. Tourism Northern Tasmania will remain responsible for coordinating the meetings.

Those agencies identified as 'Lead Organisations' will be responsible for implementation of the Actions identified in the Plan as well as engaging with the responsible State agencies.

Success factors

DIAGNOSTIC RATING

Industry research has established that the following factors are present in successful destinations. The workshop participants considered these factors relative to Launceston and surrounds in determining the priority strategies and actions.

Characteristics	Rating	Comments
1. Strong local organisations focused on their core role of visitor servicing	6.0	Launceston Tamar Valley Tourism Association (LTVTA) very focussed, Chamber excellent. Good engagement but same operators, same faces.
2. Strong regional organisations focused on their core role of regional marketing and development	6.0	Not private sector driven. Tourism Northern Tasmania doing a great job but needs to work more closely with Tourism Tasmania, Local Tourism Associations, etc., and Councils. Greater collaboration required. Small operators are the driving force.
3. Local Government support	5.0	Councils not collaborating. No brand for City. Little investment in City marketing. VICs do a good job. Too many online landing pages.
4. Strong, consistent and effective leadership by individuals or organisations	6.5	Excellent leadership from the few same (some names listed) but requires more to stand up. Need a single vision/voice. Smaller passionate operators particularly food/wine.
5. Strategic planning for the region with economic, social, environmental and cultural objectives supported by local destination plans	5.5	No cohesive strategy that brings people together. Role clarity needs defining. Tourism Development needs to be included in Eco Development. Not standalone. Lots of talk but not followed through. Strong brand from Tourism Tasmania. Regional dispersal remains a key issue. Low awareness and access.
6. Consistent visitor service excellence	5.7	Positive feedback on social media. No consistency across region.
7. Research driven cooperative marketing	6.5	Needs ONE \$\$ pool, not many disconnects, underpin State strategy. Tourism Tasmania are strong in this area, needs to trickle down to operators.
8. A breadth and depth of tourism infrastructure, experiences and events matched to market demand	6.0	Lots of good arts/cultural/sport events, business events nil. Lacking activity based experiences. Poor branding of events, failure to attract key markets. Poor site choices for events. Lack of nightlife and restaurant availability on weeknights and after 9pm.
9. Risk management plans in place	NA	Good at state level: Tourism Tasmania and Local Government. Further evaluation required.
10. Supportive communities which understand the value of tourism.	5.0	Strong community appreciation of economic value. Tourism outcomes less tangible to the broader population. Some still not on board. Hawthorn matches facilitate this – tourism is visible, media hype, CBD activity.



Action Plan implementation

The following Action Plan outlines priorities and actions as a guide for stakeholders to collaboratively and cooperatively implement the Plan. The Plan does not commit any organisation to the actions proposed but is a guide to pursuing priorities and actions which will make a positive difference to the achievement of the tourism objectives (refer page 5).

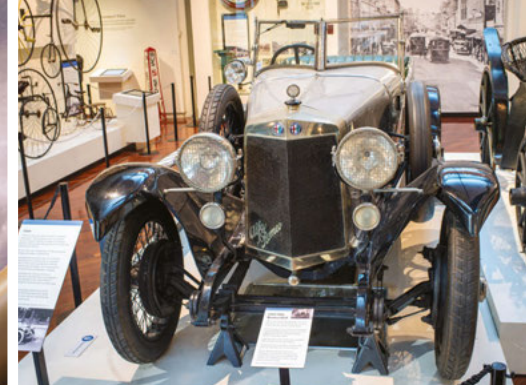
The priority actions have been assigned a KPI priority rating as a guide. These ratings are:

- HIGH** within the first year
- MEDIUM** within one to two years
- LOW** within three years
- ONGOING**

Plan implementation will be overseen by the Launceston Destination Action Plan Leadership Team and coordinated by Tourism Northern Tasmania (TNT). The Plan is a 'rolling plan' and will be reviewed and updated annually.

The following organisations have been identified to have an important role in contributing to the Plan and will collaborate to implement the priority actions. This will include nominating representatives from the following organisations:

- City of Launceston (CoL)
- University of Tasmania (UTAS)
- Launceston Airport
- City Prom
- Launceston Chamber of Commerce (Chamber)
- Tasmanian Hospitality Association (THA)
- Tourism Industry Council Tasmania (TICT)
- Tourism Tasmania
- Department of State Growth (DSG)
- Events Tasmania
- Northern Tasmania Development Corporation Ltd (NTDC)
- Tamar Valley Wine Route (TVWR)
- Launceston Tamar Valley Tourism Association (LTVTA).



PRIORITY 1 Develop a Launceston brand

It is important for key destinations to have a brand that reflects the 'personality' and attributes from both a visitor perspective and more importantly for the community and business sector providing for a sense of pride and place.

Actions

1. In collaboration with key stakeholder organisations, undertake a brand development process. Consideration to include:
 - Alignment with state (renewal underway) and regional branding
 - Reflective of the City's strong arts & natural and cultural heritage, both Aboriginal and European/colonial
 - Is aspirational for all, including community.
2. Develop a communications plan (refer Priority 2, point 5) to communicate brand elements to the community and the business sector:
 - Foster local ownership to encourage consistent use and application of the Launceston brand positioning and bring to life
 - Encourage local business and organisations to embrace and support the brand
 - Over the longer term, align events and leisure activities to support and build the brand positioning (including the state and regional brand positioning).

Lead organisation

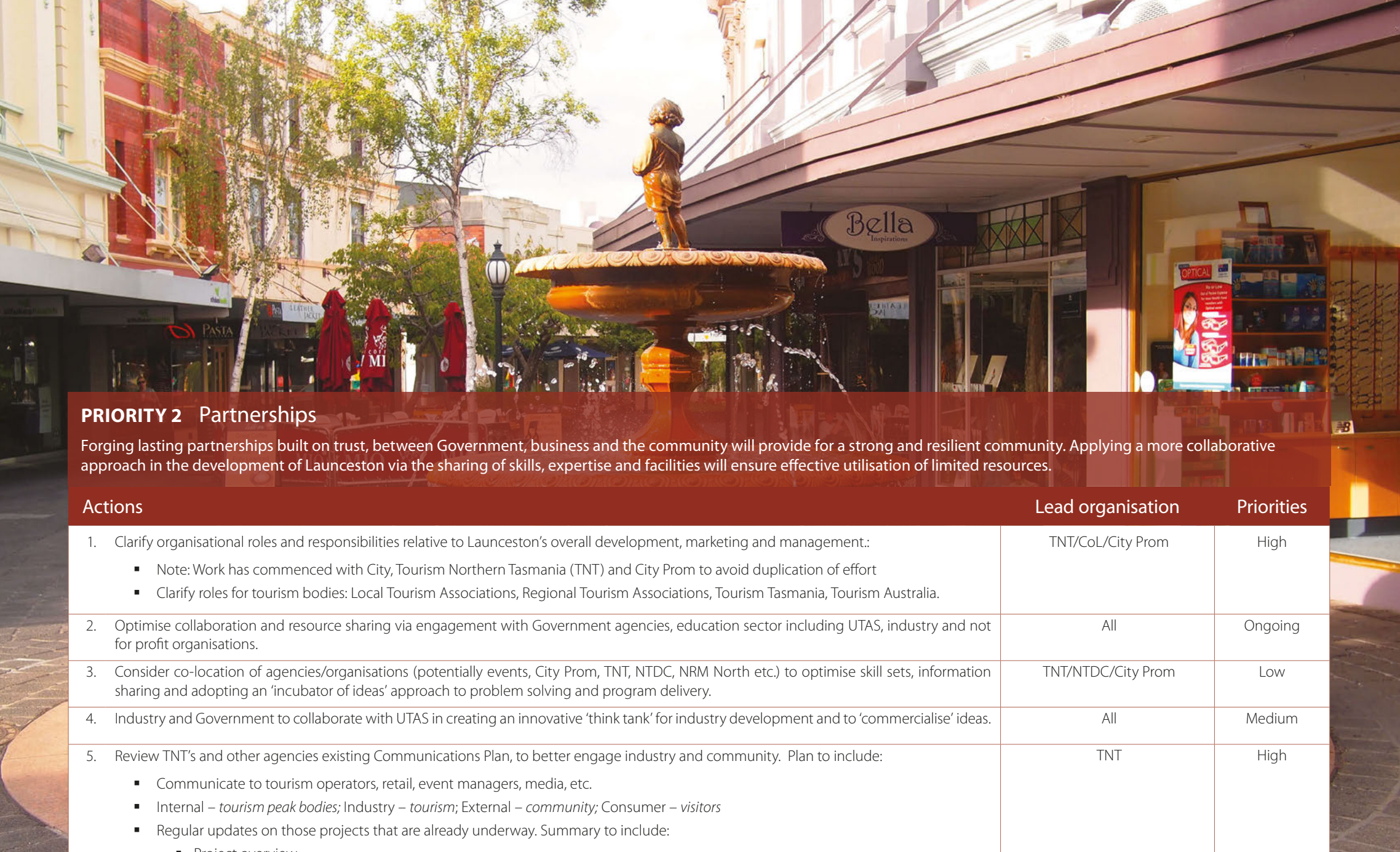
Priorities

TNT/CoL

High

TNT

High



PRIORITY 2 Partnerships

Forging lasting partnerships built on trust, between Government, business and the community will provide for a strong and resilient community. Applying a more collaborative approach in the development of Launceston via the sharing of skills, expertise and facilities will ensure effective utilisation of limited resources.

Actions	Lead organisation	Priorities
1. Clarify organisational roles and responsibilities relative to Launceston's overall development, marketing and management.: <ul style="list-style-type: none"> Note: Work has commenced with City, Tourism Northern Tasmania (TNT) and City Prom to avoid duplication of effort Clarify roles for tourism bodies: Local Tourism Associations, Regional Tourism Associations, Tourism Tasmania, Tourism Australia. 	TNT/CoL/City Prom	High
2. Optimise collaboration and resource sharing via engagement with Government agencies, education sector including UTAS, industry and not for profit organisations.	All	Ongoing
3. Consider co-location of agencies/organisations (potentially events, City Prom, TNT, NTDC, NRM North etc.) to optimise skill sets, information sharing and adopting an 'incubator of ideas' approach to problem solving and program delivery.	TNT/NTDC/City Prom	Low
4. Industry and Government to collaborate with UTAS in creating an innovative 'think tank' for industry development and to 'commercialise' ideas.	All	Medium
5. Review TNT's and other agencies existing Communications Plan, to better engage industry and community. Plan to include: <ul style="list-style-type: none"> Communicate to tourism operators, retail, event managers, media, etc. Internal – <i>tourism peak bodies</i>; Industry – <i>tourism</i>; External – <i>community</i>; Consumer – <i>visitors</i> Regular updates on those projects that are already underway. Summary to include: <ul style="list-style-type: none"> Project overview Lead agency/organisation Timeframes 	TNT	High



PRIORITY 3 Infrastructure, assets, products, experiences

Launceston offers a range of authentic and very accessible experiences with an emphasis on hospitality and agritourism, food and beverage, the arts and culture and sporting events. Cataract Gorge provides a stunning natural backdrop to the City and, with sensitive planning, could provide another dimension to the traveller's experience as well as for the local community's enjoyment.

However, there remains room for new investment throughout Launceston to enhance the visitor experience and to encourage longer stays and increased yield.

Actions	Lead organisation	Priorities
1. Undertake a product audit to identify gaps and opportunities in the provision of visitor experiences, including reviewing recent investment prioritisation work undertaken by Tourism Northern Tasmania (TNT): <ul style="list-style-type: none"> To be undertaken following the brand development project To identify those product and experience opportunities that re-enforce the brand positioning Understand where to intervene and avoid developing product in direct competition with private sector. 	TNT	High
2. Initiate a review of identified opportunities to re-invigorate the Cataract Gorge precinct. The review could consider: <ul style="list-style-type: none"> Adventure type activities Passive arts and cultural elements Visitor and event infrastructure upgrades. 	CoL	High
3. Connectivity – create strong links between hotels, food, markets & precincts to optimise the visitor experience (good example is Feast Street in Mildura – a good string of restaurants) – e.g. Eat Street, Taste Talk Walk: <ul style="list-style-type: none"> Develop a food tasting trail (existing products are in place – engage and connect to create trail) Ensure the urban spaces which support connectivity make the City safer, enable more walking and create a vital learning environment for unexpected discovery. 	CoL/City Prom	Medium
4. Events – implement key recommendations from the Events Strategy with a focus on those events that are staged off peak and re-enforce brand strengths (arts/culture/heritage/food/wine): <ul style="list-style-type: none"> Event space – create an events 'home' to provide an appropriate and accessible structure where events can be easily staged (undercover, 3 phase power, etc.) on a regular basis. Such an area/structure is likely to generate additional events outside of peak periods. Event community – create a 'hub' for events (refer Priority 2 Point 3) to cohabitate within and share resources to ensure more efficient operational and cultural outcomes. example being sharing staff, contracting, market intelligence. 	CoL	High



PRIORITY 4 Service culture

Quality service generates satisfied customers and repeat visitation. By raising industry service standards, Launceston could create a reputation and positioning for excellence in customer service and part of the brand positioning.

Actions

1. Investigate developing a long-term program with UTAS and State Development to create an environment where hospitality is considered a career rather than an interim role.
2. Increase the inclusion of hospitality and tourism service categories within the Launceston Chamber of Commerce Business Excellence Awards program and THA to recognise industry achievements/service excellence.
3. Initiate a mentoring program to assist small business operators in delivering excellence in service to include:
 - Creating a collaborative approach to staff development and sharing
 - Working with UTAS to find innovative solutions to service skills and off-peak staff shortages
 - Developing a follow-ship program for emerging young leaders
 - Train the trainers to go work within businesses on service issues – like Digital Coach.

Lead organisation

TNT/UTAS

Chamber

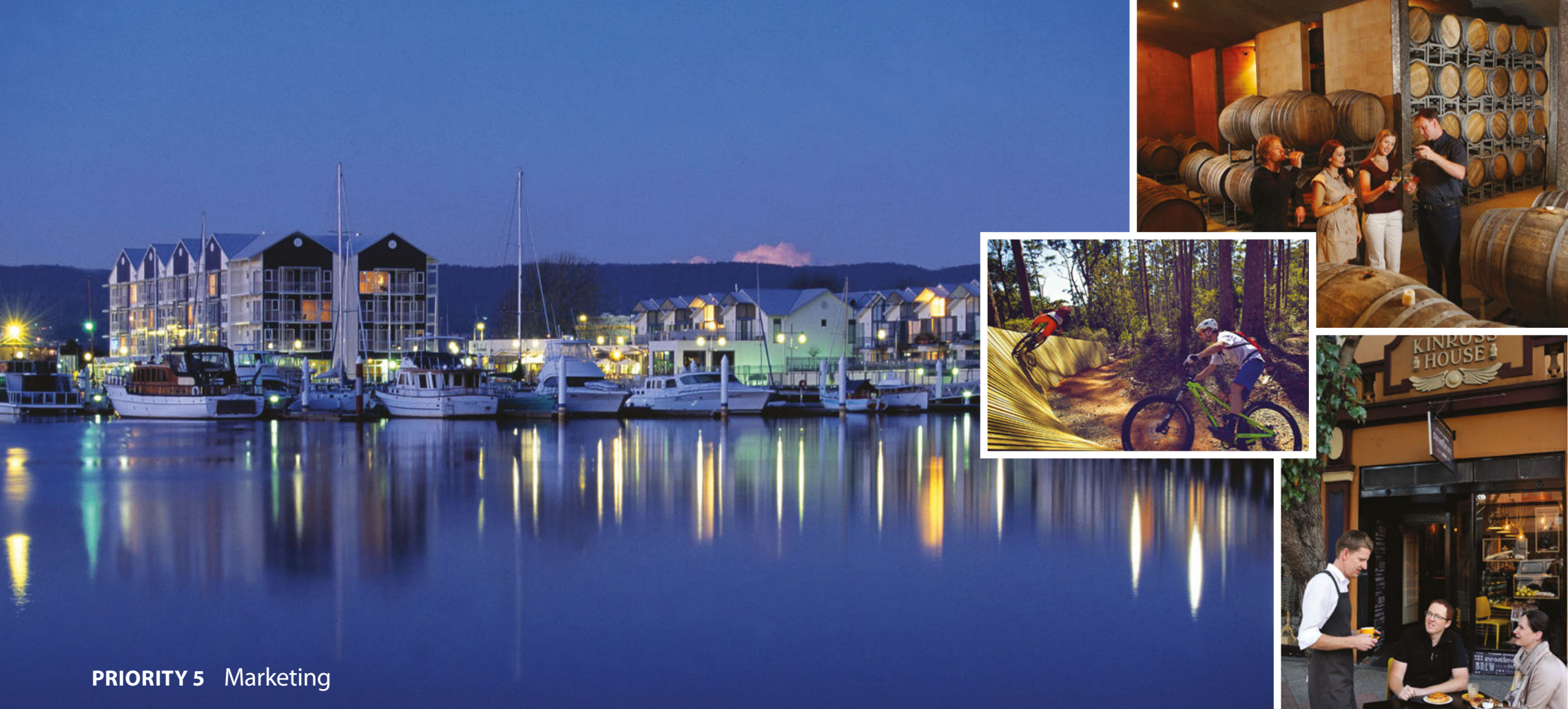
TNT/Chamber

Priorities

High

Med

Med



PRIORITY 5 Marketing

Actions

- Undertake a review of existing websites in order to rationalise existing sites and to create a single site that will inspire viewers to visit and experience all Launceston and surrounds has to offer:
 - The site will provide for multi-day visits
 - Highlight key events and experiences in and around Launceston
 - Provide for packaged experiences – link to commercial offerings
 - Reflect the consumer trip cycle phases ‘dreaming, planning, booking, experiencing, reflections’
 - What points people there? Consider advertising and a dedicated Social Media position rather than relying on Google Search

Note: See ‘Visit California’ for a ‘best practice’ website.

- Undertake a review of way-finding to provide for ease of navigation within and beyond Launceston.

Lead organisation

TNT/CoL

CoL

Priorities

High

Med

APPENDIX 1

Supporting notes

Priority 1 Brand

Clarity is needed around brand and how it is applied and the need for it to be broad enough for all to aspire to and work with. Tourism Northern Tasmania delivers a regional tourism brand however the City of Launceston needs a sense of place and community to call its own, where we see the evidence of it in our daily lives. The brand is the reputation of our place. Awareness of a potential clash between Launceston and its surrounds – this must be understood. Consider the following:

- Uniformity of the brand, rollout, builds the story and highlights our strengths, must be saleable to all including the community, must be authentic and aspirational and go beyond the City boundary.

Leanne Hurst acknowledged that the City of Launceston should be the leader for the brand development and process, an appropriate role for a city.

Need a Brand Architect – could be an opportunity for Guy Taylor to help as a strategist. Could come and present to the North and inspire some early brand work.

Priority 2 Partnerships

Discussions have commenced re role clarity between City of Launceston, Tourism Northern Tasmania and City Prom. Northern Tasmania Development Corporation is also working closely re resource sharing with these agencies.

Create partnerships with Aboriginal organisations to ensure inclusion in the development of the Plan.

Priority 3 Infrastructure

A common problem in Launceston – too much talking and planning, requires more 'doing'. See below issues raised in workshop 1:

- | | | |
|--|--|---|
| ▪ The North has a lack of confidence in the economy/investment | ▪ Lack of collaboration – there is no single vision to aspire to | ▪ Hobart continually reinforced as a capital city/entry point and financially advantaged over North by southern bureaucrats |
| ▪ Development is not easy to do – too much 'red tape'; too many road blocks from the higher policy areas | ▪ Protest culture (the 'knockers') | ▪ Launceston – 7 councils with 7 visions = 7 different directions |
| | ▪ Economies of scale – very small, lack of critical mass | |

Event facility – A large event space is lacking for both outdoor and indoor events with most restricted to Chromy's. The facility could be linked to UTAS development. As an example, VIVID in Sydney required just a handful of people as drivers – need this to create new start-up ideas.

Prospectus – The destination requires a shared prospectus – seven (7) councils, all different which is difficult for investors. Only those projects beyond \$10m become big enough to be considered by the State Coordinator Generals office. The new Northern Tasmania Development Corporation will potentially fill this space.

Launceston website – checking this site found the boutique experiences in the City are very much undersold with no user friendly way of discovering local secrets when planning a visit.

APPENDIX 1

Supporting notes cont.

Suggestions:

- Positioning – claim ‘cool climate’ all year round – a safe climate on a warming planet. Turn climate change around to be a positive. Highlight how astute investors like Ross Brown (Brown Brothers) are choosing the Northern Tasmania in preference to the mainland for growing premium wine grapes
- Food and beverage/wine – opportunities for a broader Tasting Trail from North West through North to the East – in the visitor’s eyes this makes sense rather than a fragment on the North West. Needs exploring. Increases regional dispersal. Tamar Valley Wine Route (TVWR) experience is tired and under developed, not delivering on the promise of being in the Top Ten Wines Routes in the World.
- Potential for 2 good seafood restaurants: above Seahorse World at Beauty Point and the investment at Low Head Pilot Station café.
- Vineyards, food and wine experiences need to create partnerships and experiences between agriculture, fresh produce, viticulture, cellar doors, boutique producers. Highlight seasonality and seasonal producers especially in Spring as a shoulder period.
- Revive the TVWR Barrel Auction idea (Andrew Pirie & Natasha Nieuwhof).
- The Department of State Growth Visitor Engagement Strategy is designed to address way finding, access etc., and will hopefully rationalise number of websites.

Priority 4 Service Culture:

Barriers exist around the following elements of creating a strong service culture (National issue):

- Seasonality creates difficulties in maintain a full-time workforce.
- Difficult to choose hospitality as a career aspiration when living in a town where casualisation is the norm.
- Requires a change in community culture, starting at school
- New competitors (Uber, Airbnb, etc.) do not have ‘leaders’ – the new environment is about ‘followship’ rather than leadership

FELLOWSHIP: Chris Griffin suggested that Angela Driver could bring the group together and work on ‘followship’ concept – to become an advocacy group.

DESIGN THINKING: Leanne Arnott mentioned that Carol Harding (www.carolharding.com.au and www.whatisdesignthinking.org) might be a valuable workshop opportunity for the group .