

GREATER HOBART

Destination Action Plan 2016–2018

April 2016



Acknowledgments

The development of the Greater Hobart Destination Action Plan has been facilitated by Destination Southern Tasmania with the support of the Department of State Growth.

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 Greater Hobart 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 'bottom up' plan driven by the community (business and residents) while being cognisant of State and regional strategic plans and programs.

Destination Southern Tasmania would like to thank all who participated in the plan development process:

Facilitator

Wayne Kayler-Thomson

Greater Hobart Destination Action Plan Working Group

Bill Avery	Alex Heroys	Lexie Magill	John Roche
Vin Barron	Philip Holliday	Erin McGoldrick	Andrew Ross
Iain Chalmers	Andree Hurburgh	Tony McMullen	Ben Targett
Pippa Dickson	Ald. Kristie Johnston	Robert Pennicott	Greg Walker
Steve Farquer	Stacey Joseph	Melinda Percival	Mark Wilsdon
Rachel Fischer	Lucy Knott	Lisa Punshon	Leigh Woolley.
Iris Goetzki	Kristy Little	Jane Richardson	

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Introduction

This Destination Action Plan for Greater Hobart identifies priority strategies and actions which if implemented over three years will enhance Greater Hobart's position as the 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 then identified and agreed on the key priorities and actions that would make a positive difference to the growth and sustainability of the Greater Hobart visitor economy and experience.



The visitor economy

Tourism contributes \$1,849.5 million to the Hobart and Southern region, accounting for nearly 13,000 jobs.

Visitors to Greater Hobart 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' contributed to the local economy which supports jobs, real estate value and the provision of services, facilities and activities in the community.

Year ending September 2015 Hobart and Surrounds attracted a total of 921,837 (81% all visitors to Tasmania) interstate and international visitors:

- Hobart City 848,172
- Other Hobart and Surrounds 269,411
- Average length of stay (holiday visitors) 3.9 nights

Intrastate visitation to Hobart and South comprises:

- 2.02 million day trips (1.1 million holiday)
- 519,000 overnight trips (237,000 holiday)

Direct Gross Regional Product

Interstate and international visitors spent 1.17 billion in Hobart and the South:

- Interstate \$987 million
- International \$187 million

Intrastate visitors spent over \$372 million in Hobart and the South:

- Daytrippers \$216 million
- Overnight visitors \$156 million

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

Tourism sector represents 7.1% of total employment in Southern Tasmania (approximately 6,800 jobs).

- Tourism in the south is estimated to generate \$973.4m in economic output.
- Major tourism related industries are accommodation and food services, with employment concentrated in Greater Hobart area.

Indirect Gross Regional Product

The total value of tourism to the region's economy is estimated at up to \$1,849.5m. The economic output is estimated to support 12,922 jobs in the region.



Our opportunities

Objectives

The common objectives for tourism are:

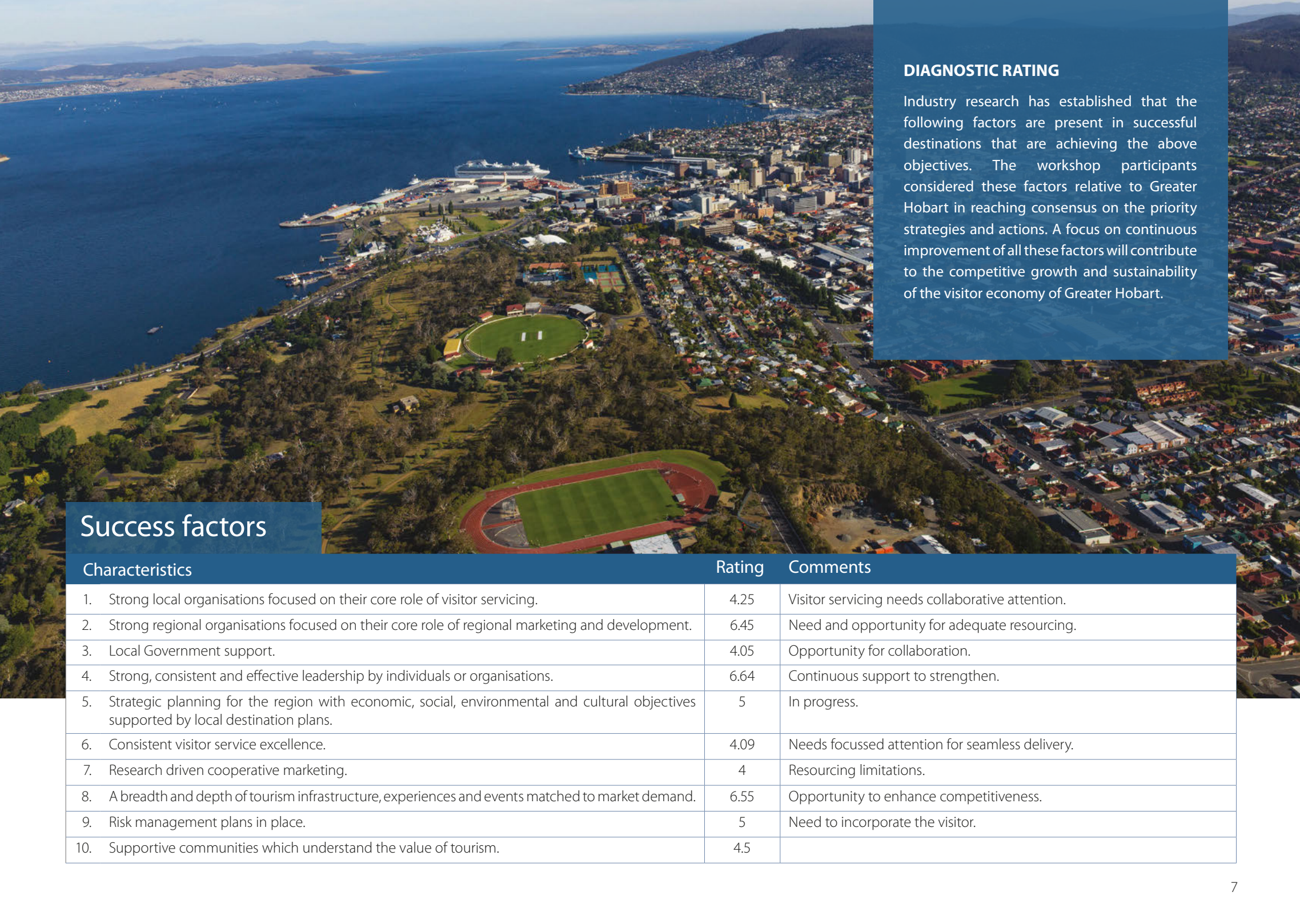
1. To increase visitor numbers
2. To increase visitor length of stay
3. To increase visitor expenditure
4. To increase visitor dispersal (geographically and seasonally)
5. To increase visitor satisfaction.

- Improve accessibility: public transport connections, rail and ferry.
- Entire community owns tourism experience through education.
- Develop a supported visitor infrastructure plan that meets visitor needs. Encourage development of appropriate experiences and attractions with a focus on waterways and cultural opportunities.
- Planning processes to consider visitor experiences and support infrastructure plan.
- Champion a mature coordinated approach between key stakeholders. This requires clarity around roles and responsibilities and investment in tourism and industry structures.
- Take a holistic view of visitor servicing for the whole state. This includes streamlined signage, wayfinding, free WiFi in public spaces and welcome and farewell experiences. The Tasmanian Travel and Information Centre could be a shopfront for entire State. Regionally integrated information systems should include multi language options.
- Understand best practice visitor service standards throughout the visitor journey and provide training opportunities to ensure customer service excellence. This includes visitor satisfaction research and measures.
- Secondary and tertiary education in line with industry needs.
- Develop structured approach to coop marketing between key stakeholders including Tourism Tasmania, RTOs and industry. This includes integrated digital marketing activity.
- Mentoring programs for small tourism businesses.
- Increase collaboration with UTAS to target visiting friends and relatives (VFR) market.
- Strategic approach to cruise ships/sector.



Our challenges

- Delivering appropriate service standards, improving customer satisfaction.
- Investment in careers in tourism, focussing on all levels of education.
- Resources to invest in skills and industry development to meet visitor needs i.e. cultural awareness.
- State and local government investment in tourism: infrastructure, public transport.
- Coordination and collaboration between key stakeholders. Clarification of and understanding of roles for LTAs, RTOs and local government.
- Community understanding of and support for the value of tourism.
- Developing new and innovative experiences that meet market needs.
- Addressing seasonality.
- Coordinated and planned approach to development. Balancing development, heritage and authenticity.
- Low perceived value of arts, craft and design environment to the visitor economy.
- Focus on experiences not regionality.
- Accommodation capacity and quality.
- Accessibility of attractions and experiences – wayfinding, transport.
- Digital technology investment support and integration including free WiFi.



DIAGNOSTIC RATING

Industry research has established that the following factors are present in successful destinations that are achieving the above objectives. The workshop participants considered these factors relative to Greater Hobart in reaching consensus on the priority strategies and actions. A focus on continuous improvement of all these factors will contribute to the competitive growth and sustainability of the visitor economy of Greater Hobart.

Success factors

Characteristics	Rating	Comments
1. Strong local organisations focused on their core role of visitor servicing.	4.25	Visitor servicing needs collaborative attention.
2. Strong regional organisations focused on their core role of regional marketing and development.	6.45	Need and opportunity for adequate resourcing.
3. Local Government support.	4.05	Opportunity for collaboration.
4. Strong, consistent and effective leadership by individuals or organisations.	6.64	Continuous support to strengthen.
5. Strategic planning for the region with economic, social, environmental and cultural objectives supported by local destination plans.	5	In progress.
6. Consistent visitor service excellence.	4.09	Needs focussed attention for seamless delivery.
7. Research driven cooperative marketing.	4	Resourcing limitations.
8. A breadth and depth of tourism infrastructure, experiences and events matched to market demand.	6.55	Opportunity to enhance competitiveness.
9. Risk management plans in place.	5	Need to incorporate the visitor.
10. Supportive communities which understand the value of tourism.	4.5	



Action Plan implementation

The following Action Plan outlines priorities and actions as a guide for stakeholders to collaboratively and cooperatively implement the Plan. To facilitate this, an Implementation Leadership Group of representatives will be formed. While the Plan identifies primary organisational responsibilities and in many cases joint responsibility, it is reasonable to expect that the Implementation Leadership Group will consider and review this progressively. One key consideration will be the availability and securing of resources to progress the implementation of the Plan in a timely manner. It may also be appropriate and necessary to involve other organisations and to seek funding for specific projects.

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 noted above.

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

Progress of implementation of the Plan will be undertaken annually by Destination Southern Tasmania in consultation with the Implementation Leadership Group. This may result in a revision and updating of the Plan. Regardless, a new plan will be prepared in three years.

The following organisations have been identified to have an important role to consider and progressively work together to implement the priority actions. This will include nominating representatives to form the core of an Implementation Steering Group.

- Destination Southern Tasmania
- Hobart City Council
- Clarence City Council
- Glenorchy City Council
- TasTAFE
- University of Tasmania (UTAS)
- Hobart Airport
- Tasmanian Hospitality Association (THA)
- Tourism Industry Council Tasmania (TICT)
- Tourism Tasmania
- Department of State Growth
- Events Tasmania
- Hobart Chamber of Commerce
- Tasmanian Chamber of Commerce and Industry.



PRIORITY 1

Improve collaboration and cooperation between key visitor economy stakeholders.

Actions

1. Undertake an audit of Greater Hobart visitor services and stakeholder visitor economy related functions.
2. Clarify organisational roles and responsibilities relative to the Greater Hobart visitor economy development, marketing and management. Consider opportunities to maximise collaboration and cooperation, resource sharing and avoidance of duplication.
3. Establish a formal Greater Hobart Partnership Agreement between local governments and Destination Southern Tasmania (DST) to include agreed roles and responsibilities and cooperative resourcing to develop, market and manage the visitor economy.
4. Establish a Leadership Group to facilitate the implementation of this Destination Action Plan (DAP) and include this in the proposed Partnership Agreement. The Leadership group to identify 2-3 actions for collaborative leadership and facilitation in the first year, apply a sound project management process and to implement a progress reporting and industry/community engagement plan.
5. The Councils of Greater Hobart and DST to support the DAP and actively participate in the Leadership Group to consider and implement it. The implementation to also take account of and be consistent with the T21 Tasmanian Visitor Economy Strategy 2015-2020.
6. Engage with community groups to understand the Plan and its implementation.

Participating organisations

Priorities

- | | | |
|--|--|------|
| | | High |
| | | High |
| | | High |
| | | High |
| | | High |
| | | High |



PRIORITY 2

Develop a competitive advantage from visitor satisfaction and seamless visitor service excellence.

Actions	Participating organisations	Priorities
<p>1. Prepare and implement an integrated and comprehensive business development oriented program focused on development of a visitor service excellence culture delivered by all visitor facing businesses and services.</p> <p>Consider:</p> <ul style="list-style-type: none"> ▪ The THA Customer Engagement program. ▪ Tourism Victoria Tourism Excellence program. ▪ Training and education for students, tourism operators, retail and business generally. ▪ Destination Southern Tasmania’s Tips and Tipples member networking events and annual Tourism Summit, continue to invite appropriate speakers to ensure practical outcomes for operators. ▪ Consider an experience based business leadership/mentor program such as Fraser Coast Tourism program. ▪ Priority focus on key visitor ‘touch points’. ▪ Business self-analysis tools rather than prescriptive approaches. ▪ Encourage participation in the TICT accreditation program. ▪ Regular communication to business with tips and promotion/recognition of examples of service excellence. ▪ Monitor digital information channels (e.g. Trip Advisor) and encourage operators to respond to posts both positive and negative. Educate operators on how to maximise customer engagement via digital channels. ▪ Develop a destination visitor satisfaction survey or mystery shopper instrument, communicate results, benchmark and set performance improvement targets. (Measure it to manage it!). ▪ Enhance the visitor arrival experience at Hobart Airport as a showcase of Greater Hobart. 		High



PRIORITY 2 cont.

Actions	Participating organisations	Priorities
<p>Consider:</p> <ul style="list-style-type: none"> ▪ Hobart Airport Gateway precinct project under the Tourism Demand Driver Infrastructure Funding program. ▪ Terminal arrival baggage collection area promotion. ▪ Welcoming and promotional signing on the highway into Hobart. ▪ Visitor information service. ▪ Spatial implications of visitor experience embedded within the landscape. ▪ Actively engage with any review of the Tasmanian Travel Information Centre business model. Consider the concept of a 'Gateway Visitor Centre' as a showcase/orientation/'attraction story' of the Greater Hobart visitor experience and a cooperative business services hub for service providers, building on the Hobart Visitor Information Services Review 2014. ▪ Prepare a visitor economy risk management plan integrated with local and state government emergency management plans. ▪ Encourage business participation in the Southern Tasmania Tourism 'Stars' program to recognise service and business excellence. ▪ Continue to support business participation in the Tasmanian Tourism Awards. 		



PRIORITY 3

Encourage product development innovation.

Actions

1. Undertake market analysis to identify gaps and opportunities in the provision of visitor experiences. Promote to existing business operators and to encourage new business start-ups. Consider:
 - a. Market trends – seek external expert advice
 - b. Audit of existing products and services
 - c. Review of and visits to other destinations
 - d. Alignment with T21 targets and priorities
 - e. Innovation mentoring
 - f. Funding initiatives such as crowd funding, venture capital and investor matching.

Participating organisations

Priorities

2. Encourage and support business participation in relevant visitor economy and business innovation conferences including Destination Southern Tasmania's annual Tourism Summit.
3. Consider a program to subsidise or fund business research visits for exposure to visitor experience innovation, trends and best practice.
4. Consider establishing a cooperative business support venture for small and micro businesses, including community visitor focused events, to provide business administration, marketing and services to enable operators to focus on product and service delivery.
5. Consider statewide initiatives flowing from T21.

High

High

High

High

High



PRIORITY 4
Prepare an integrated visitor infrastructure development plan.

Actions	Participating organisations	Priorities
<p>1. Undertake a review of current visitor infrastructure and market needs analysis.</p> <p>Consider:</p> <ul style="list-style-type: none"> ▪ T21 target and priorities. ▪ An audit of current visitor infrastructure maintenance and renewal needs. What are the specific impacts of the growth targets outlined in T21? ▪ Identify development gaps including the need for new or redeveloped accommodation, attractions and services as well as support infrastructure. ▪ Public infrastructure improvements including development and enhancement of distinctive visitor precincts. ▪ Visitor amenities quality, maintenance and location. ▪ Consultation with government and key stakeholders. ▪ Identify the Top 10 priority public and private projects, including the enhancement of the key mountain and waterways experiences. ▪ Business case development. ▪ Southern Councils Infrastructure Plan. 		Medium
<p>2. Undertake a review, from a visitor perspective, of transport, access and way finding to identify improvement needs and to manage current and future visitation.</p>		Medium
<p>3. Understand new planning schemes as they relate to Greater Hobart and work with stakeholders to ensure consistency and processes which encourage, facilitate and support development of appropriate and desirable visitor infrastructure (accommodation, attractions and services) consistent with market demand standards.</p>		Medium
<p>4. Prepare a Greater Hobart investment prospectus of development opportunities enabled by appropriate pre-determined land use planning. Consider public/private partnerships.</p>		Medium



PRIORITY 5

Develop the arts and built environment as a competitive advantage visitor product strength.

Actions

1. Prepare a visitor segment development plan to identify opportunities to support and develop existing and new arts and cultural visitor attractions, events, experiences and services, with the aim to create a distinctive and competitive market positioning for Greater Hobart. Consider:
 - Market research to identify current perceptions and opportunities matched to market demand and competitor destinations.
 - Interpretation enhancement of the built environment to expose the 'place of settlement' and 'life stories' via print, digital and way finding for key locations, precincts, buildings etc.
 - Encourage guided services for visitors such as precinct and special interest walking tours.
 - Support for local artisans and artists including precinct focused cooperative showcases and or 'pop up' stores.
 - Consider funding and grants programs to encourage innovation, new products, events and exhibitions that can deliver visitor yield and dispersal.
 - Consider a program to collaborate and engage with and educate the arts community regarding their role in the visitor economy.
 - Set quality control standards to maximise reputation protection and yield.
 - Prepare a cooperative marketing plan.
2. Prepare an events strategy for year round visitor attraction including 'block buster' unique exhibitions.
3. Identify opportunities to encourage indigenous cultural experiences.
4. Engage with the education sector to identify opportunities to encourage student interest and engagement in the arts and visitor economy.
5. Consider implication of planning schemes to encourage preservation and interpretation.
6. Encourage TICT to take a leadership role with other key stakeholders such as peak Arts bodies and planning bodies to champion the value of public spaces as integral to the visitor experience.

Participating organisations

Priorities

High

Medium

Medium

Medium

Medium

Medium



PRIORITY 6

Increase community understanding and support for the visitor economy.

Actions

1. Engage the education sector (all levels) on the value of the visitor economy as a current and future growth industry and the local and global career opportunities it offers.
2. Encourage regular media exposure of the value of the visitor economy to Greater Hobart with features and stories of business success, careers, innovation and visitor satisfaction.
3. Prepare a communication plan to regularly promote the value of the visitor economy. Consider:
 - Engage with TICT, Tourism Tasmania and Government agencies to communicate key messages.
 - Identify and support visitor economy advocates as media commentators, guest speakers and community 'ambassadors'.
 - Prepare and regularly update a 'Balanced scorecard' on the value of the visitor economy communicated in simple language without mass statistics (e.g. jobs, retail expenditure).
 - Encourage tourism businesses to support community events and activities.
 - Invite community representatives to industry functions.

Participating organisations

Priorities

1. Engage the education sector (all levels) on the value of the visitor economy as a current and future growth industry and the local and global career opportunities it offers.		High
2. Encourage regular media exposure of the value of the visitor economy to Greater Hobart with features and stories of business success, careers, innovation and visitor satisfaction.		High
3. Prepare a communication plan to regularly promote the value of the visitor economy. Consider: <ul style="list-style-type: none"> ▪ Engage with TICT, Tourism Tasmania and Government agencies to communicate key messages. ▪ Identify and support visitor economy advocates as media commentators, guest speakers and community 'ambassadors'. ▪ Prepare and regularly update a 'Balanced scorecard' on the value of the visitor economy communicated in simple language without mass statistics (e.g. jobs, retail expenditure). ▪ Encourage tourism businesses to support community events and activities. ▪ Invite community representatives to industry functions. 		High