



**COOL SEASON EVENT RESEARCH PROJECT
COMMISSIONED BY TOURISM NORTHERN TASMANIA**

**FINAL REPORT
by Natalie De Vito & Laura Ripoll Gonzalez, April 2017**



EXECUTIVE SUMMARY

Introduction

Tourism Northern Tasmania (TNT), in partnership with the City of Launceston (CoL), Silverdome Launceston, Events Tasmania and CityProm, identified the opportunity to make a significant impact in the low tourism season and initiated the Cool Season Events Research Project.

Events deliver a range of positive impacts which build on the opportunity to make Launceston an even better place to live, visit and invest. The Cool Season Event Research Project findings provide sound evidence that our city and region, our infrastructure and our people have the capacity to attract and host many more events to fill the calendar, particularly in the cooler weather. A dedicated resource, a co-ordinated effort and a partnership approach will increase the numbers of events, visitor numbers and yield.

Research Objectives

The key objectives of this cool season events research are to:

- scope the capacity of major venues and sporting associations to meet national standards and host national championships and events;
- scope the capacity of the City of Launceston and the northern region to host events that attract participants/visitors;
- scope the cool season events calendar to determine gaps;
- report on the potential and size of the national event market, and identify potential opportunities to attract/incentivise new events;
- report on existing and potential funding and investment options through available grants and sponsorships; and
- assess the potential economic and social benefits of proactive event attraction.

Methodology & Data Inaccuracies

For the purposes of this research project, the cool season has been identified and encompasses 1 March through 30 November (in line with Events Tasmania). Given the immediacy of the project the research was focused on

two key target areas: geographic focus and capacity for potential event attraction over three timeframes: 1-3 years, 3-5 years, and 5+ years.

Research Summary

Overview of Venue Capacity and National Standards

In order to attract national championship sporting and other events both venues and associations need to meet national standards. The key findings demonstrate wide variation of national standards between each sport and across sporting events, which in turn requires event venues to meet a unique and precise listing of standards. Launceston venues meet standards for a range of sports.

Alongside national standards, an assessment of the venues' infrastructure capacity, current community usage, role in the bidding process, and event hosting policies was conducted. The investigation revealed that all the venues are capable of hosting more events, but indicate that a reassessment of the economic model/operational structures alongside developing a holistic policy and approach to venue usage would support goals of increasing venue usage and visitation. This would also ensure reasonable community expectations are met alongside minimal impact to hirers and users.

Launceston Capacity

An environmental scan and assessment of the infrastructure capacity of the City of Launceston and northern Tasmania confirms the ability to host an increased number of events and large influxes of intra/interstate visitors. The scan considered accommodation, interstate and intrastate transportation (and in particular the ability to increase daily flight service), hospitality and equipment suppliers, medical services, and potential major event conflicts. Currently the only times identified where capacity would be stretched in the cool season were during AFL Hawthorn match weekends, V8s, Agfest and Targa.

Events Calendar & Gaps

An evaluation of the major sporting events held from 2010 to 2018 alongside the following criteria was used to prioritise sports for further investigation for event attraction. The criteria included: major sports that have an existing presence and have previously hosted national championships in the region, local and state associations that have demonstrated capacity to host events, sports that could maximise Launceston's venues, events that operate in the cool season and align with the brand, and sports that align with growing trends in interest and participation in Tasmania and nationally.

The following priority sports were identified to offer a range of scale, type, venue usage, and demographics including: bowls, cricket, cycling (BMX, mountain, road, track), football (AFL), hockey (field, indoor), motocross, multisport, netball, orienteering, rowing, rugby (7s), soccer (including futsal, Neymar 5-on-5), swimming, and tennis.

Overview of National Events Market & Potential Events

Sports events and championships have become a more recent focus, with councils creating specific strategies and policies dedicated to attracting sporting events in line with their major event attraction strategies. Major events provide economic confidence, support local community spirit and pride of place, and can utilise and feature venues and natural environment.

The national marketplace holds thousands of sporting championships and events, and is becoming increasingly competitive. Launceston has been less proactive in this space. Given the natural assets of Launceston, its own top regional airport with direct flights to major city centres, and major venues there is every reason for Launceston to be a successful competitor in the national event marketplace.

Based on an assumed goal of attracting a total of 5,000 additional visitors in the cool season, it is clear that attracting 2-3 major events per year could meet this target. Therefore, a potential 5,000 visitor increase can be achieved by two large-scale events over fewer days, or three or more small-scale events over more.

A range of potential events to attract were identified over the coming five or more years. Following discussions with the various state and national associations, these events are suitable for Launceston.

Overview of Potential Grants & Sponsorship Investment

In Tasmania, both Events Tasmania and Tasmanian Department of Communities, Sport & Recreation (CSR) offer grants to sporting organisations to support bidding and incentivise hosting sports championships (and touring) in Tasmania. The CoL does not offer funding to support event bidding or incentives. Events Tasmania, as well as CoL offer grants for event development.

Research revealed that many other Tasmanian city councils are regularly successful with CSR sporting infrastructure grants and also support applications for sports associations to upgrade facilities. This suggests potential areas for further development both by CoL and other agencies to support local associations to upgrade, increasing the region's overall capacity. Sponsorship opportunities exist for sporting and championship events, but are subject to many variables and require strategic planning with each state and national sporting association.

City Comparative Analysis

Nationally, many regional cities are investing in sporting events and championships as a means to attract visitation, extend visitor stay, and develop greater pride of place and maximise the unique elements of the city as part of a greater destination branding and attraction plan.

In all the cases reviewed, the comparative cities clearly invest funds specifically in sports events bidding and hosting costs, have at least one senior staff dedicated to event development and procurement, and sports event attraction forms a significant part of their overall events strategies. They also embrace collaborative interdepartmental practices that in turn support their broader community and economic development plans.

Key Findings

To return to the key objectives of the research project and summarise findings, there is scope, capacity and resources that could be better leveraged:

- Some major venues have the capacity to meet national standards
- Sporting associations are willing to host events and championships
- The CoL and region has the capacity to host increased visitors
- The current events calendar has the capacity to hold increased events
- The national event market is large enough to accommodate attracting suitable events to Launceston and the region
- There are funding and investment options at the local, state and national levels that support event attraction and infrastructure development, and
- Comparative cities have demonstrated success with event attraction when adequately resourced..

Key Recommendations

There are 44 key findings and recommendations from this research.

The top 10 recommendations in no particular order include:

1. Develop a holistic regional strategy for venue management that supports event attraction in the region across all venues in collaboration between CoL and state government and major venues
2. Review hire agreement policies and where relevant economic model for state and CoL owned venues to meet Events Strategy goals
3. CoL to create targeted incentive funding to support covering hirer fees to attract events to specific Launceston venues
4. Review cost benefit and streamlining potential of combining management of Silverdome and Elphin Sports Complex
5. Review potential infrastructure developments to upgrade venues to meet growth of sports and increasing standards of sports complexes nationally
6. Develop a Reference Group of key stakeholder across transportation, accommodation, suppliers and major events to review capacity issues. Providers were keen to see a potential central contact point, and to be part of a reference group

7. Develop a coordinated major event calendar and comparative data collection with all major stakeholders including Events Tasmania, CoL, major venues, and liaise with BET, Hawthorn
8. Initiate immediate 2017-18 benchmarking and trends analysis of existing and projected data on events to begin comparisons and cool season event growth
9. Target juniors and masters championships because they bring additional family and friends, and tend to use events as opportunities for pre- and post-event travel
10. CoL to consider existing grant programs and long-term strategies for event growth and sport development leading to increased visitation; an assessment of overall designation of funds between types of events: arts, community, sport, food with further designation of either community or visitation building focus, and thereby separate out community-focused funding for events from visitation/participation attracting events

Final Recommendation – Invest in an Event Attraction resource

The Report recommends investment in the creation of a 1.0 FTE position over three years, with a salary range at Level 10 or 11 at local government rates (\$60-\$90,000). Positioning the role at TNT enables an alignment with tourism and visitation objectives, and provides an arms-length position when negotiating incentives with CoL or state governments, engaging with neighbouring councils, and working with venues and associations.

The role would collaborate with state and national associations to develop long-term event attraction strategies, support associations on event attraction, bidding and event funding, advocate for incentive funding at local and state levels, oversee event calendar management, key stakeholder communication, and create networks between sporting associations and clubs, venues and funders.

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1.1 SITUATION SUMMARY & DEFINITION OF THE ISSUE

In their recent Event Strategy 2016-2019, the City of Launceston (CoL) identified a range of benefits which flow from events including: increased use and activation of community assets and cultural, entertainment, sport and recreation venues. A CoL priority is to encourage events in off-peak and shoulder tourism seasons when demand is traditionally lower and to improve tourism impacts, and economic and social benefits.

Launceston is also home to a range of excellent multi-purpose and sporting venues and infrastructure which could be used more frequently. Current data and information is limited or does not exist, including: the existing events calendar gaps, venue capacity, national standard criteria, national events market opportunities, and the infrastructure capacity of the city and region to host and attract events.

As a result, Tourism Northern Tasmania (TNT), in partnership with the City of Launceston (CoL) and partners Silverdome Launceston, Events Tasmania, and CityProm initiated the Cool Season Events Research Project to assess these capacities.

1.2 RESEARCH OBJECTIVES

The key objectives of this cool season events research are to:

- scope the capacity of major venues and sporting associations to meet national standards and host national championships and events;
- scope the capacity of the City of Launceston and the northern region to host events that attract participants/visitors;
- scope the cool season events calendar to determine gaps;
- report on the potential and size of the national event market, and identify potential opportunities to attract/incentivise new events;
- report on existing and potential funding and investment options through available grants and sponsorships; and
- assess the potential economic and social benefits of event attraction.

1.3 METHODOLOGY

Given the immediacy of the project and without confirmation of the existence or depth of information of comprehensive data relevant to determining a baseline analysis of Launceston capacity, venue capacity, and current events, the research focused on two key target areas: geographic focus and capacity timeframes for potential event attraction.

GEOGRAPHIC FOCUS

The primary geographic focus on the Launceston area, and expanded to include major venues/events in northern Tasmania with further research and assessment focused on those currently operating that meet national accreditation standards and that can be used immediately or in the medium-term, with no or minor infrastructure upgrades and developments.

CAPACITY TIMEFRAMES FOR EVENT ATTRACTION

Based on an assessment of these venues, and taking into consideration the existing events calendar, City of Launceston infrastructure, and the capacity to attract appropriate events to the region, the potential events to attract are broken down into three timeframes. These timeframes are based on the differing schedules and requirements of national championships and events by sport. It also takes into consideration the developmental timeframe required to initiate bidding, the actual bidding timeframes when bids are open for tendering, and the process involved in actively attracting and procuring events. The timeframes are reasonable and fit with those of other councils that actively attract events.

- **Short-term capacity (1-3 Years)**
- **Medium-term capacity (3-5 Years)**
- **Long-term capacity (Beyond 5 Years)**

As detailed in the Report below, each section identifies the current situation, gaps and potential for event attraction in Launceston and the region, and identifies key findings and recommendations.

1.4 TIMING CONSIDERATIONS & INCONSISTENT DATA

The one-month limited timeframe of this research report, including extensive and multifaceted data gathering, analysis and reporting allowed only for a scoping assessment. Data gathering proved challenging due to several factors:

1. The lack of a single identified role/person or department/organisation for information gathering or recording at either the City of Launceston or the Tasmanian Government made access to information time consuming, with several requests across various departments. The timeframe also made it challenging for project partners to gather necessary information.
2. The research project identified a lack of recorded data related to current venues and their capacities, or events and their impact on the city/state including event dates, visitor numbers, bed nights, location of event, kind of event, event organiser, etc.
3. In the majority of instances where data existed there were major inconsistencies of data from year to year.

While these inconsistencies presented challenges in determining accurate starting benchmarks upon which to project future growth, they do present clear opportunities.

At the least they reinforce the need for a centralised point-person and organisation for the region's events and venue data as they relate to event strategy and event attraction. Similarly, these gaps demonstrate the potential benefits of establishing common guidelines or systems for data collection, based on greater communication between all local and state stakeholders across the sporting events attraction landscape.

2.1 NATIONAL STANDARDS & VENUE CAPACITY

Venues play a key role in attracting and hosting national sports events. A key benefit identified in the CoL Events Strategy and an objective outlined by this Research Project is increased usage of council- and state-owned venues as a result of championships and sporting events.

An assessment of the venues and national standards was conducted to scope the capacity of existing major venues to meet national standards to host competitions and major events, and determine if the venues could support increased event usage through event attraction. Alongside national standards, an assessment of the venues' infrastructure capacity, current community usage, role in the bidding process, and event hosting policies was conducted. As well, the existing relationships between venues and the local and state sporting associations and their capacity and willingness to host sporting events and championships were assessed.

The analysis is based on information and insights received from Project Partners CoL, Silverdome, UTAS Stadium; main venues Elphin Sports Centre, Launceston Leisure & Aquatic Centre, Launceston Regional Tennis Centre, Lake Barrington, and Symmons Plains, alongside insights from local, state and national sporting associations, sports marketing companies and government bodies.

MEETING NATIONAL STANDARDS

In order to attract national championship sporting events, both venues and associations need to meet national standards. The key findings demonstrate wide variation of national standards between each sport and across sporting events. This in turn requires each event host venue to meet a unique and precise listing of standards. Each potential event and host venue requires an ongoing case-by-case review as standards change and are updated regularly.

The types of parameters required for assessing capacity of venues to meet national standards, include, for example:

- overall dimensions of the court, pool, field, ground

- venue specs of flooring type, ceiling height, lighting
- water or air temperature and ability to regulate
- changing facilities for male, female and disabled
- spectator viewing capacity and distance from playing arena
- catering facilities, media and VIP facilities
- parking, equipment access

LAUNCESTON VENUE CAPACITY

For the purposes of this research project, a venue's capacity to host national events was assessed by reviewing its sporting facilities, as well as its infrastructure capacity, including: staffing, catering facilities, toilets, changing rooms, spectator seating, parking, media facilities, and any other requirements to support hosting national championships. In addition, atmosphere needs must be considered against venue size and scale.

Launceston venues all meet national standards for a range of sports.

COMMUNITY USAGE

The venues' current capacities to attract and host national events are limited by several factors. Firstly, as the majority of Launceston's venues are primarily used by local community groups, participation sports and individual members, it was necessary to assess the community usage, rental fees and policies, all of which are significant influencing factors in the availability of Launceston venues to host sporting competitions.

The Elphin Sports Centre in particular is almost exclusively used by community. Their business model is based on community usage through hire fees. The Launceston Leisure & Aquatic Centre is a regional centre which serviced 402,448 users last year. The Centre's revenue comes from learn to swim students, gym and aquatic members, facility hire and casual entries.

Additionally the economic models and income targets required to operate don't allow room for the venues to provide discounts or in-kind support. This is particularly relevant to the Silverdome, which has higher fees due to the size

and scale of operations and support provided (although it does offer 50% discounts to charitable organisations).

Furthermore, high rental fees were noted by all sporting associations with respect to venue usage for championship events (and in some instances it was reported that the Launceston rates were similar to North Sydney rates).

The need to maintain higher rates (or maintain community users) to meet income targets is counter to the broader goals of attracting events and visitors to the region. This points to a serious need for the CoL alongside the state government to work collaboratively with all major venues to maximise potential events through additional support to associations to incentivise hosting events and cover the hiring fees. The venues must still meet their financial targets to operate, while the CoL and northern region are losing events that could bring significant economic impact.

If the CoL initiated an incentive fund to support covering Launceston venue hire fees (or specific venues), this could immediately begin to ameliorate this situation, and in particular, could greatly impact the Silverdome which currently has a 50% occupancy rate.

Furthermore, in the case of the Silverdome and Elphin Sports Complex, both are state-owned, operated separately, and in fact competitors in the sporting and events space. Although outside of the scope of this research project, a feasibility study to determine the potential cost benefit and streamlining by combining both organisations under a single administration may support reducing overhead and thereby offset hirer fees and on costs to the associations.

As a consequence, it was reported that due to the high fees, several sports associations chose to host championships outside of Launceston (including in Devonport, Clarence, Kingsborough, Glenorchy and Hobart). In all cases, the sporting associations confirmed that if CoL supported incentive funding to offset high rental rates to use Launceston venues, they would relocate championships. A minimum of five major events (upwards of 200-1,000

participants each) have been relocated over the past four years, and further upcoming championships have not been tendered for this reason.

The investigation revealed that all the venues are capable of hosting more events. However, the research also indicates that a reassessment of the economic model/operational structures is required alongside the development of a holistic policy and approach to venue usage. This would support CoL and state government goals of increasing venue usage and visitation, while at the same time ensuring venue operating costs are maintained with incentives to offset hirer fees, and reasonable community expectations are met alongside minimal impact to community hirers and users.

VENUE MAINTENANCE

In addition to issues around usage, elite sports commitments of major venues require ensuring the optimal condition of their grounds or venues are maintained. This is particularly relevant to the UTAS Stadium, where grounds maintenance surrounding Hawthorn (AFL) home games potentially limit event attraction. In addition, the logistic requirements for several sports (setting up cricket pitches and wickets) require major adjustments that need a longer time frame for event negotiation and implementation.

That said, there is scope to increase events within these parameters, and most obviously looking at sports events and championships that can use the existing infrastructure in place in the shoulder periods of the major events (for example targeting juniors and other events within AFL and cricket, etc.).

VENUE INFRASTRUCTURE DEVELOPMENT

In some cases, venues will need further development and increased versatility not only to meet national standards over the coming years, but to remain competitive against an increasing number of sporting complex developments in other rival bidding Australian regional locations.

It was evident that several venues, for example Elphin Sports Centre and Launceston Tennis Centre both require upgrades and further infrastructure

development (i.e. increased grandstands and clubhouse) to support hosting national events and meet the demands of several sports that are rapidly growing.

While the Silverdome has versatility in its layout and can accommodate numerous sports at the same time, large-scale seating events require major set-up. Another issue for the Silverdome is access to Kate Reed mountain bike trails after office hours, limiting user access. A potential feasibility study of the Silverdome could assess infrastructure upgrades to increase spectator capacity and enable it to become more adaptable for quick-turn over to different sports, creating more readily useable arenas/courts with varied spectator viewing options, as well as potential options for better access for mountain bikers as the sport is projected to continue growing dramatically.

Table 1 (on following page) outlines the major venues, the main sports the venues currently host and potentially could host or increase, usage percentage rates, and notes on availability of venue for championships attraction.

NATIONAL STANDARDS & VENUE CAPACITY KEY FINDINGS & RECOMMENDATIONS

- 1. Most Launceston major venues meet national standards**
- 2. National standards are unique per sport and can shift per bid and event and need to be reviewed regularly in collaboration with the local and state sporting associations per bid**
- 3. Current venue economic models and policies rely on community usage and set hire fees, often rejecting hosting competitions, or are unable to provide discounts to incentivise events staying in Launceston**
- 4. Review lease agreement policies and where relevant economic model for state and CoL owned venues to meet Events Strategy goals**
- 5. CoL to create targeted incentive funding to support covering hirer fees to attract events to specific Launceston venues**
- 6. Review cost benefit and streamlining potential of combining management of Silverdome and Elphin Sports Complex**
- 7. Review potential infrastructure developments to upgrade venues to meet growth of sports and increasing standards of sports complexes nationally**
- 8. Develop a holistic regional strategy for venue management that supports event attraction in the region across all venues in collaboration between CoL and state government and major venues**

See Appendix 1: Venue Database and National Championship Standards for an overview of the major Launceston and region venues.

TABLE 1: MAJOR VENUES: CAPACITY AND AVAILABILITY TO HOST NATIONAL CHAMPIONSHIPS

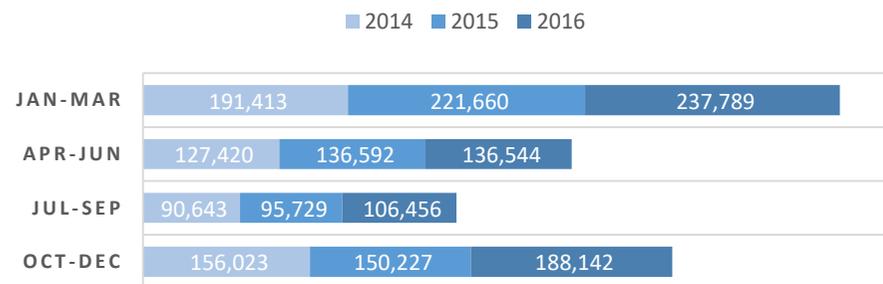
VENUE	OWNED BY/ MANAGED BY	CURRENTLY HOSTS EVENTS IN THESE SPORTS	HAS CAPACITY TO HOST NEW EVENTS IN THESE SPORTS	CURRENT COMMUNITY & NATIONAL SPORTS USAGE (estimates)	NOTES ON AVAILABILITY FOR NATIONAL SPORTS USAGE
Silverdome	Tasmanian government/ Tasmanian government	Basketball Rowing	Indoor sports Dancing	20% community 30% national sports events 50% not used	<ul style="list-style-type: none"> • Huge potential for any indoor sports, particularly Juniors or Schools events during winter
UTAS Stadium	City of Launceston/ City of Launceston	AFL Cricket Soccer	AFL Cricket Soccer Rugby	40% community 60% national sports events (and maintenance)	<ul style="list-style-type: none"> • Maintaining high standards often restricts usage of facilities (grass) • Flexibility (i.e. seating closer to playing area) needed to attract potential events
Launceston Regional Tennis Centre	City of Launceston/ Tennis Tasmania	Tennis	Schools Championships	80% community and state 20% national	<ul style="list-style-type: none"> • Major national tournaments held in January • Potential to work with Schools Nationals • Limited infrastructure
Launceston Leisure & Aquatic Centre	City of Launceston/ City of Launceston	Swimming Pool life saving	Swimming Canoe Polo Under Water Hockey	95% community and state 5% or less national	<ul style="list-style-type: none"> • High level of community use • Facility design not suitable for most national events
Elphin Sports Complex	Tasmanian government/ Leased	Basketball Table Tennis	Indoors sports Dancing Darts Bowls	90% community and state 10% national	<ul style="list-style-type: none"> • Has a business model and internal policies to attract championship events, but high community reliance and usage limits scheduling availability
Lake Barrington	Tasmanian government/ Rowing Tasmania	Rowing	Multi-sports Orienteering Motorsports - Hillclimb	70% community and state champs 30% national sports events	<ul style="list-style-type: none"> • Water too cold in winter to meet in/on water sports national standards • Can host other multi-sports in cool season months
Symmons Plains	Privately owned/ Motorsport Tasmania	Motorsports: Targa, V8, etc.	Range of motorsports	N/A	<ul style="list-style-type: none"> • Potential to host other motorsport events
Blue Derby	Dorset and Break O'Day Councils/ Dorset Council	MTB	MTB	N/A	<ul style="list-style-type: none"> • Potential to host other mountain biking events (juniors)
Barnbogle and Lost Farm Golf Courses	Privately owned and operated	Golf Polo	Golf Polo	N/A	<ul style="list-style-type: none"> • Potential to host other golf events (juniors and veterans); pending weather conditions

2.2 LAUNCESTON CAPACITY

An environmental scan and assessment of the infrastructure capacity of the City of Launceston and northern Tasmania confirms the ability to host an increased number of events. The scan considers accommodation, interstate and intrastate transportation, hospitality and equipment suppliers, medical services, and potential major event conflicts. The results were collated through interviews and insights from key providers.

Graph 1 shows the Tasmanian Visitor Survey (TVS) data conducted by Tourism Tasmania statistics demonstrating the seasonal variation of visitors to northern Tasmania across 2014-2016, and in particular shows the significant gaps and opportunity for growth in the winter and cool season compared to its summer counterpart.

GRAPH 1: TOTAL VISITORS TO NORTHERN TASMANIA (as reported by TVS)



Accommodation: According to data collected from ATDW (Australian Tourism Data Warehouse), there are over 3,000 beds in Launceston and an additional 4,000 in the north within one hour's drive. New hotel developments (the Silo and TRC hotels) will continue to add capacity to Launceston. Currently the only times identified by the accommodation providers where capacity would be stretched in the cool season were during AFL Hawthorn match weekends, V8s, Agfest and Targa.

Launceston's main accommodation providers observed that the city is able to meet demand during large-scale events, and when event clashes result in full capacity. They indicated a shared willingness to collaborate to service large events and that the availability of accommodation options surrounding Launceston in the Tamar Valley region can absorb extra visitors.

Interstate transportation: A review of the Launceston Airport and Spirit of Tasmania demonstrated capacity to manage increased events and visitor numbers to the region. They also confirmed there is flexibility to increase daily service in the winter and shoulder season to meet demand. In particular, Launceston Airport has had direct experience in increasing airline carriers' capacity to meet demands of major events clashes. The fact that Launceston has one of (if not the) best regional airports with direct flights from most major cities, as well as the Spirit (one hour away) was seen as a major advantage by comparative regional cities.

Intrastate Transportation: Insights from main transportation providers revealed that Launceston has the capacity to host large influxes of visitors for national events. Transportation providers (bus coaches and car rentals) already work collaboratively during peak seasons and that in the past, to ensure services, even during major events/holiday periods clashes (most recently the V8 and Enduro, and Band Championships over Easter holidays). Providers confirmed greater availability in the cool season.

Suppliers: A preliminary review of marquee hire companies and others equipment suppliers indicated that apart from a couple of major events in the north that could significantly impact the resources available (Agfest and Launceston Cup), they confirmed to have the capacity and flexibility to respond to events demanding greater infrastructure, especially in winter.

Access to Medical Services: Access to medical services and the Launceston General Hospital in particular have previously been managed during sports events and championships when necessary.

Conflicts with other Events: As the events environment is dynamic, potential conflicts of major events will need to be constantly reviewed. That said, an initial assessment revealed that other factors related to potential conflicting events were road closures (i.e. Targa and Targafest), which are generally organised well in advance and well managed. The long-lead timeline for event attraction would support mitigating potential conflict or issues.

Business Events Tasmania would need to be a key stakeholder within the cool seasons attraction to ensure Launceston capacity and limit potential conflicts with large-scale conferences.

LAUNCESTON CAPACITY KEY FINDINGS & RECOMMENDATIONS

- 9. Launceston has the capacity to host increased number of events and visitors in the cool season including accommodation, interstate transportation, intrastate transportation, and vendors and suppliers**
- 10. Providers were supportive of the possibility of increased events during the cool season and welcomed the initiative**
- 11. Accommodation during AFL games, V8s, Agfest and Targa was identified as being at capacity with recommendations to avoid scheduling conflicts with these events**
- 12. The events environment is dynamic and constantly changing as events originate, shift and develop, requiring constant monitoring**
- 13. Develop a Reference Group of key stakeholder across transportation, accommodation, suppliers and major events to review capacity issues. Providers were keen to see a potential central contact point, and to be part of a reference group**
- 14. Research possible visitation packages (with Tourism Tasmania) to incentivise and support extending visitor stay**

2.3 COOL SEASON EVENTS CALENDAR & GAPS

An environmental scan and assessment of the current and planned events that attract visitors to northern Tasmania for the period 2010-2020 was conducted to assess the existing calendar for scheduling gaps, identify trends in events, and potential areas for growth and the overall capacity to host an increased number of events and championships.

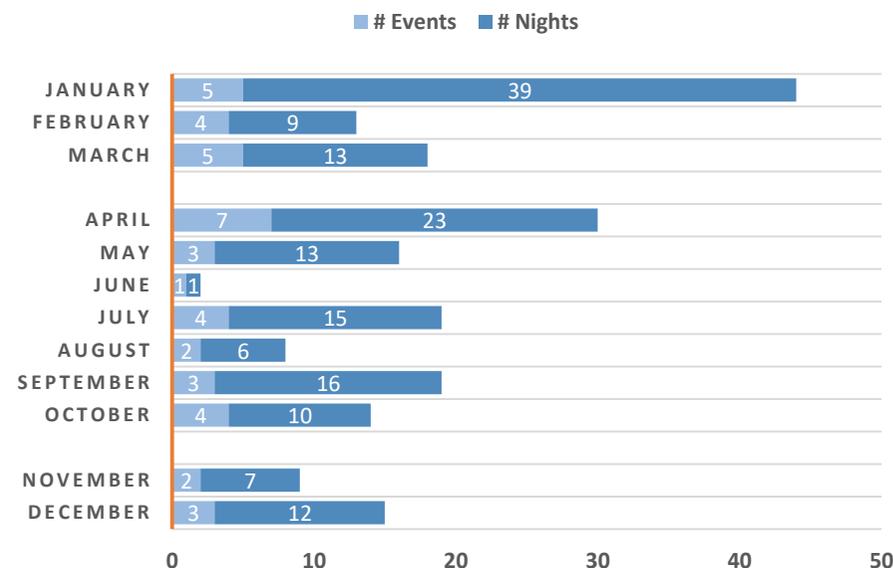
The CoL Events Strategy 2016-2019 identifies goal of increasing the number of events to the city and region, and to present a variable, well-rounded calendar of events that support visitation and economic development as well as liveability and community development.

Data to create the events calendar was gathered and provided by Events Tasmania, CoL, and the major venues (UTAS Stadium and Silverdome) of funded events. As noted in Section 1.4, this data is the most inconsistent, and points to a need for a centralised point-person liaising across organisations, governments and venues to ensure consistent data collection.

The primary issue with the event gap analysis was a lack of consistent data across all years including: event dates, bed nights, interstate visitation or participant numbers, or event location/venue. This lack of data limits a precise analysis from year-to-year of the: number of events monthly, number of event days monthly, number of event participants monthly, bed nights monthly, all of which enables an assessment of trends in these parameters over 10 years.

Graph 2 shows the number of events held and the number of event nights per month based on 2010 event data compiled by Events Tasmania. Events included are only those that impact visitation (and therefore excludes all community events). While this data does not provide a complete picture of the events schedule of 2010, it is the most complete of all data gathered from 2010-2020, and provides a snapshot demonstrating the region's capacity, and opportunities to host more events and event nights in Launceston and northern Tasmania.

GRAPH 2: 2010 EVENT CALENDAR
EVENTS & # BED NIGHTS
 (as reported by Events Tasmania)
 (insufficient data to show 2010-18)



It is important to note that only events with visitation impact are relevant to an assessment of the calendar and potential gaps, as any other event – community, local sport or other do not impact capacity, but are rather seen to enhance the visitor experience.

KEY SPORTS FOR EVENT ATTRACTION FOCUS

Based on the reported events, Graph 3 (following page) outlines the sport and number of events hosted between 2010 and 2018. Again, as previously noted, due to limited data this information provides a sample view of funded sporting events hosted in Launceston and northern Tasmania.

Moving forward, data collection will need to focus across government, councils, venues and associations, to set clear starting benchmarks to support long-term trends analysis initiated immediately and monitored to report on success of cool season event attraction, including:

- type of sport and event (championships/touring/other) in total
- sports and events that return (# years # nights # visitors)
- higher visitation number events
- average higher bed night events
- number and variation of number of events across months
- trends on funded events (breakdown by sport, # funded by Events Tasmania and # funded by CoL)
- report on collaborations between associations, venues and council/government in terms of successful funding allocations
- number of bids tendered vs number successful
- average costing of bids and hosting to gather data

LAUNCESTON EVENTS CALENDAR KEY FINDINGS & RECOMMENDATIONS

- 15. Data gathering has been inconsistent across state government, CoL, and venues, and does not provide consistency to create clear starting benchmarks for growth analysis**
- 16. The current events calendar does demonstrate capacity to host more events across the cool season**
- 17. Based on the types of sporting events historically hosted in Launceston and the growth of sports locally and nationally, a priority list of sports for event attraction has been developed**
- 18. Develop a coordinated major event calendar and comparative data collection with all major stakeholders including Events Tasmania, CoL, major venues, and liaise with BET, Hawthorn**
- 19. Initiate immediate 2017-18 benchmarking and trends analysis of existing and projected data on events to begin comparisons and cool season event growth**

See Appendix 2: Event Calendar 2010-2020 for a listing of the major events in Launceston and northern Tasmania.

3.1 NATIONAL EVENTS MARKET

Cities nationally have identified arts, festivals and sporting events as potential drivers for economic, social and community development, with event strategies and policies to support their attraction. Sports events and championships have become a more recent focus, with councils creating specific strategies and policies dedicated to attracting sporting events in line with their major event attraction strategies.

Major events provide economic confidence and support local community spirit and pride of place. Rather than trying to replicate the successes of Hobart and other cities Launceston needs initiatives that maximise and support Launceston's own tremendous and unique qualities.

The national marketplace holds thousands of sporting championships and events, and is becoming increasingly competitive. As more cities nationally scope the potential for sporting events to support economic impact, there are increasing competitors entering the event marketplace to host events with designating funding to secure bids and infrastructure development.

Launceston has not been proactive in this space. Given the natural assets of Launceston, its own top regional airport with direct flights to major city centres, and major venues (in particular UTAS Stadium), there is every reason to suggest that Launceston can be a successful competitor in the national event marketplace. Presuming a limited budget within a competitive market, it is imperative that a clear events strategy is developed to ensure maximum leveraging of Launceston's strengths.

An analysis of the size and scale of the national events market, with a focus on participatory events including sports championships and sporting events and car and motorcycle touring groups was conducted.

Major sporting events for the majority of sports are managed by the state sporting associations under the auspices of the national associations or national (or international) governing bodies (GB). The associations

traditionally bid, solicit funding and manage the events, often with the assistance of state or federal sporting associations, tourism bodies, and local and state governments.

Sports Management Companies (SMCs)

An assessment of sports management companies that operate in the national events market identified several factors for consideration and potential implications for event attraction for Launceston. Based on a review of the existing data from the 154 major events hosted in Launceston/northern Tasmania reported over 2010-2018, 96 events (62%) were organised by a sporting association, 17 events (11%) by a sports management company/non-sporting association, and 41 events (27%) are unknown. Of these events, the types of sports that used SMCs included: A-league soccer, running, superbikes, road cycling, and touring groups.

Although some national associations use SMCs, they do not collectively hold a monopoly on events within the national market. While some cities have and continue to use SMCs to develop their event attraction strategies, it appears to be during the initial phase of event attraction development, and where a council may not have the staff structure to manage. SMCs are also used to support event delivery and staging (such as the Coles Bay Half Iron Man). As an example, School Sports Australia uses an SMC to organise the events across Tasmania (because there is currently no local association or staff), and indicated that they would greatly benefit from a centralised point-person assisting in Launceston and northern Tasmanian bids and hosting.

Based on research, SMCs receive minimum average \$2,000 spotter fee per event, which increases considerably as event scale increases. Based on discussions with and reviews of comparative cities, several have found their return on investment greater with internal management due to more direct relationship with all stakeholders when managed locally and collaboratively between the local and state governments, national and state associations, venues, tourism bodies, and events suppliers. Devonport specifically saved over \$20,000 from first year, which has been redirected to event attraction.

3.2 BIDDING PROCESSES

The 'Bidding Process' is a practice across all sports whereby the governing body (GB) responsible selects which organisation/venue/location will stage an event. It typically requires the submission of an EOI followed by an invitation to submit a formal proposal outlining how the host organisation will organise the event and their capacity to stage it. Bidding can also be actively pursued by local associations at any time, by developing relationships with the GB.



Key factors in a successful bid over rival bids include:

- Greater political and financial investment by city/state
- Potential long-term growth of sport in region
- Potential increased participants in event
- Better facilities for participants and spectators
- Ability to attract spectators and sports tourists
- Bid team composition, reputation and success
- Infrastructure capacity of host city
- Communication and marketing exposure and stakeholder engagement

A review of national events bidding highlights the following key factors:

Timeframes for bids: The most common bidding timeframe is two to three years from EOI announcement to event staging. However, some sports like basketball operate on an annual timeframe. Last minute host cancellations also lead to potential for short term attraction (6-12 months). Several bidding attempts may be required to secure events.

Geographic Rotations: Some sports and particularly juniors' championships rotate between states and territories in a 7-year cycle, offering continuity. States may decline hosting, and then the event is offered by EOI to other states creating opportunities for short term attraction. On several occasions Launceston and Tasmania have lost rotating events for a range of reasons.

Sport Association Capacity to Undertake Bidding: Local associations may have the capacity to host an event, but may lack the financial and HR capacity to undertake a bidding process, or have no incentive to host events because there isn't funding support locally.

Bid Costings: As the sports market is highly dynamic and sports are difficult to compare, bidding costings need to be assessed on a case-to-case basis and covers costs of bid and venue assessments by NSO. Bidding fees can range from \$2-3,000 (Devonport and Basketball Tasmania have previously paid this), to bids of over \$1 million for large scale events (Sydney).

Hosting Fees: Upon winning a bid, hosting fees (or hosting rights) are usually paid to the organising body for each event and are highly variable based on the type of sport and tournament. Some hosting fees may be prohibitive; however, there is a wide range of events that match Launceston's capacity. For example, some hosting fees are included in annual association fees like Basketball, while others are separate. Rowing Tasmania has paid between \$20-\$50,000 hosting fees for national championships to Rowing Australia.

Council Support and Communications: Although small incentive funding exists to host events from both CSR and Events Tasmania, however the amounts do not usually cover the costs of bidding, and hire rental fees which are high in Launceston.

Council support through incentive funding would incentivise local associations to bid and host more events. Similarly, a noticeable lack of support by way of a staff person or contact in Council or the north to support building bidding was acknowledged. Most local sports associations know who to contact at other councils, but could not identify anyone at CoL, and so tended to liaise directly with other councils. This again points to a need for a key point-person for associations across sporting events, and also for external enquiries from national or international associations, clubs and touring groups, who can then liaise with the appropriate venues, funders, etc. to secure bids and events.

NATIONAL EVENTS MARKET & BIDDING PROCESSES KEY FINDINGS & RECOMMENDATIONS

- 20. Launceston and northern Tasmania have unique features that make it an ideal and competitive location to host sporting events**
- 21. Many state sporting associations confirmed they would relocate events hosted elsewhere around the state back to Launceston with support from CoL**
- 22. Ensure event attraction strategies support long-term collective objectives of the CoL and state government, and that they leverage, enhance and build on Launceston's existing capacities and unique qualities and venues**
- 23. CoL to review providing incentive funding to sports associations to host events in Launceston**
- 24. There is a clear need for a centralised point-person to support and act as a network node for all bidding and sports events development. Event attraction in the region could be better supported and further developed by a centralised point-person who is the first point of contact for all information or enquiries on event attraction**
- 25. Evaluate all rotational events that have been missed in Tasmania to determine feasibility of reinstating or tendering**
- 26. Assess any recently cancelled hosted events and determine feasibility to host in Launceston in short-term**
- 27. Develop long-term bidding strategies and schedule in collaboration with all state sporting associations**

3.3 POTENTIAL NATIONAL EVENTS

For the purposes of this research project, the cool season has been identified as and encompass 1 March through 30 November (in line with Events Tasmania), essentially excluding the summer months of December to February. Although there are still greater visitation numbers and events in March/April and November, they are considerably lower than summer comparisons and thus offer additional opportunities for growth with sporting events operating in the shoulder seasons.

Following an assessment of the current events landscape, the capacity of venues in Launceston and sporting associations, several potential sporting events were identified as *examples* of events suitable for event attraction to Launceston. Insights and discussion with state sporting associations confirm the events are currently available and open for bidding (and several are annual tenders). From insights from state sporting associations, all events listed are suitable for potential Launceston bidding and hosting.

All bidding and tendering processes are managed by the individual state organisations with the national sporting governing bodies and requires liaising and review with each sporting association. Discussions with local and national associations must be undertaken prior to actual event bidding by the local associations, and will form part of a long-term strategy development. This will be a labour-intensive process in the initiation phase, and once a format is developed whereby key bidding and championship dates are outlined, will become more streamlined.

ATTRACTING VISITORS IN THE COOL SEASON

Based on a long-term goal of attracting a total of 5,000 additional visitors in the cool season, it is clear that attracting 2-3 events per year could meet this target. Therefore, a potential 5,000 visitor increase can be achieved by two large-scale events over less days, or three or more small-scale events over more.

Table 2 demonstrates potential ROI based on example sports and national championships and events that could be attracted to Launceston. Calculations are based on the potential number of participants and number of bed nights (averaged from previous events), calculated at \$200/night per person. (Tourism Tasmania 2016 reports a daily average spend of event tourists at \$194; Events Tasmania reports \$200).

TABLE 2: EXAMPLE ROI ON POTENTIAL SPORTS CHAMPIONSHIPS

Sport Championship	Number Participants	Number Nights	Potential \$ ROI
2018 Basketball U16 National Championships	1,000	7	\$1.4m
2018 Schools Sports Australia Swimming National Championship	300	3	\$180,000
2019 Basketball (Ivor Burge) U20 National Championships	150	8	\$240,000
2019 Little Athletics National Championships	200	7	\$280,000
2019 Karate National Championship	400	3	\$240,000
2020 Cricket U13 National Championship	220	5	\$220,000
2020 BMX National Series (Round 9)	300	1	\$60,000
2021 BMX National Championship	3,000	6	\$3.6m
2023 Field Hockey Oceania Hockey Cup	400	6	\$480,000
2024 Cycling Road Women's National Road Series	130	3	\$78,000
2025 Cycling Track U15 National Championships	130	3	\$78,000

Within all the priority sports identified earlier, research indicates that juniors and masters championships bring significant spectator viewing often doubling or quadrupling visitors. For example, it was identified by most sporting associations that U10, U12 tend to bring parents and grandparents, while U16 brings parents and U20 maybe one parent. Masters games tend to bring partners and friends. These groups also have a higher tendency to stay longer and travel increasing pre- and post-event tourism. Elite sports participants tend to fly in and out, and limit additional travel.

The focus for event attraction for this research report is to capitalise on increasing juniors and masters championships in the region. Championships and events that take place over an extended stay over 3 nights were also targeted to increase visitation numbers, with many juniors games operating between 5 and 7 nights. Finally, participant numbers also significantly increase a ROI, and events with over 150 participants have been targeted, although smaller events over longer days could equally provide significant return.

PRELIMINARY CRITERIA FOR ATTRACTION FRAMEWORK

Strategic alignment with Cool Season Event research objectives:

- Falls within the Cool Season and does not compete locally
- Meets Launceston's Events Strategy, TNT's destination strategy and Tourism Tasmania's brand strategy
- Contributes to the priority focus on sporting championships, touring groups, and touring car and motorcycle clubs
- Supports and fills a well-rounded, varied calendar

Capacity and infrastructure needs can be met:

- Venue capacity supports the event's specialisation needs
- Meets accommodation capacities
- Risk level of sport or event and capacity to control and manage (including ambulance/helicopter access and rescue)
- Road access requirements/transport requirements
- Potential human capacity/local association or volunteer
- Media requirements

- Availability of local business infrastructure and capacity to support events (marquees, staging/AV equipment, fencing, etc.)

Impact:

- Potential long-term event development and economic impact
- Potential local participation/tourism visitation and mobility
- Potential environmental impact, and
- Potential participant/visitor numbers.

POTENTIAL NATIONAL EVENTS TO ATTRACT KEY FINDINGS & RECOMMENDATIONS

- 28. There is scope to attract events from 1 March to 30 November**
- 29. The championship and sporting events market is dynamic and constantly changing requiring ongoing assessment and review with each national association**
- 30. There are many sporting events with small participant numbers (100+) over longer nights as well as well large participant numbers (500+) over shorter nights, all contributing to achieving higher visitation**
- 31. Preliminary criteria were established as a framework for future event attraction to determine suitability to attract to Launceston**
- 32. Preliminary ROI modelling demonstrates significant potential income, based at \$200/person per night spend**
- 33. Target juniors and masters championships because they bring additional family and friends, and tend to use events as opportunities for pre- and post-event travel**
- 34. There are many available championships currently open for bidding in priority sports with events suitable for Launceston and its venues and associations**

See Appendix 3: Potential National Event to Attract for an example listing of major events nationally suitable for attraction to Launceston and northern Tasmania.

4. CASE STUDIES

The following case studies act as examples to reflect on Launceston's major venues and how potential events can be aligned with them. Case studies include: Silverdome, UTAS Stadium, Launceston Regional Tennis Centre, Elphin Sports Centre, Launceston Aquatic, Lake Barrington, and Symmons Plains.

4.1 CASE STUDY: UTAS STADIUM

Council owned and operated, the UTAS Stadium is one of Australia's best AFL grounds and a great regional venue with competitive advantage over similar national venues. Preliminary information around UTAS Stadium events reveals opportunities to increase the number of hosted events but also highlights several issues with the usage of the venue that need to be observed when soliciting sports events and championship during the cool season.

The hosting of national AFL games (Hawthorn) require great efforts in maintaining the quality of the field, which often results in declining events to preserve a maximum standard. Changes of sports from cricket to rugby 7 and back to AFL also require significant logistics. However, there are opportunities for strategic event planning focusing on the periods where the field has more capacity. The current contract with AFL and potential variables in the hosting dates might impact the capacity to host other events.

Cricket Tasmania indicated availability and great potential to host a range of national and junior championships in the venue over the next 3 years. The current contract with AFL and potential variables in the hosting dates, however might impact the capacity to host other events.

4.2 CASE STUDY: Launceston Leisure & Aquatic Centre

The Launceston Leisure & Aquatic Centre is a regional facility owned and operated by Council. The venue is an exemplar to many other regional aquatic facilities. The facility was designed to cater to community needs. The facility does not meet national requirements for many aquatic events and activities.

Swimming Tasmania has confirmed the pool is limited to short course due to the shallow end. They mentioned the venue did not have the capacity for major championships with the pool having only eight lanes. There are spectator capacity issues and marshalling considerations.

Swimming Tasmania advised they are looking to bring other swim meets to Launceston as part of their development program. The Centre has accommodated requests to host events in the past. The swimming events for the Australian Masters Games will be held at the Centre in October. The Centre does not actively identify opportunities to host major events.

4.3 CASE STUDY: LAUNCESTON TENNIS CENTRE

The Launceston Regional Tennis Centre is council-owned and leased by Tennis Australia. Despite hosting yearly international tennis championships, the venue has potential to attract Juniors and Masters events during the cool season, like the Oceania Regional Seniors Championships, or the SSA 12 Years and Under Tennis Championships organized by school sports Australia.

Further infrastructure development to support a clubhouse to replace portable facilities will increase significantly the capacity of the venue to host additional national sports events, and reduce the hiring costs of non-permanent and portable temporary facilities.

4.4 CASE STUDY: SILVERDOME

Silverdome is a state owned and managed premier venue in Tasmania capable of hosting a range of indoor sports events. At present, Silverdome has a 50% occupancy rate (community usage and national events). This presents great opportunities for increasing usage, particularly around indoor sports events, and expand mountain bike usage at Kate Reed.

The venue has been used to host several international events in the past (in 2016 netball and boxing with a short turnaround of 72 hours) and proven its capacity and flexibility to adapt, thus projecting scope for further developments.

The stadium is currently undergoing a series of infrastructure upgrades and is looking at increasing adaptability of its surface, composition and seating, ranging from an easier or less expensive conversion into a multi-court venue to additional requirements to provide the atmosphere suitable for an event. (i.e. Square Dancing Convention moved to the Elphin Sports Centre because Silverdome was 'too big'). However, despite both venues being state government owned, they are operated separately and often conflict for event attraction.

In the absence of a mid-range venue between the Elphin Sports Centre and Silverdome, with further infrastructure support, Silverdome could increase hosting of indoor hockey, futsal, basketball and other events and championships, in addition to supporting further cycling events in the velodrome. This is supported by insights from various state sporting associations that have identified Silverdome as a potential venue and with funding to offset hirer fees, would readily use the venue.

4.5 CASE STUDY: LAKE BARRINGTON

Lake Barrington, similarly to the Launceston Tennis Centre, is operated by the state association, Rowing Tasmania, and operates at national and world best practices in hosting rowing events. Rowing Tasmania has reported significant flow-on effect of its events into the Launceston economy.

Despite the fact that the water is too cold to host events in water in the cool season, Rowing Tasmania has recently expanded to include a staff member devoted to event attraction and development to bid for other sporting events (such as orienteering and motocross hillclimb) to further utilise the venue and its facilities during the cool season.

Rowing Tasmania recognises the importance of event development and hosting, and confirmed a TNT role that supported their efforts would greatly enhance Lake Barrington usage.

4.6 CASE STUDY: SYMMONS PLAINS

Symmons Plains is another example of successful usage of a venue that hosts national events bringing large numbers of visitors to the state. In addition to a recent \$3M redevelopment to suit V8 requirements, and the hosting of Targa Tasmania, Symmons Plains proactively brings national motorsports events to the region, creating flow-on into the Launceston and northern Tasmanian economy. In addition to the Australian GT Championships and Tasmanian series, the venue could increase the number of motocross events (previously hosted Super X).

Symmons Plains has previously hosted, and has the potential to attract more School Sports Championships, as well as other national championships and carnivals in cross country running. The development of a relationship and strategy with Athletics Tasmania and School Sports Australia could result in the attraction of more of these events to northern Tasmania.

5. GRANTS & SPONSORSHIP ANALYSIS

A review of past and current funding sources, including public and private investment and grant options was conducted to scope the availability of current and potential funding at the local, state and national levels suitable for event attraction to Launceston.

Research indicates that there are typically three primary types of investment and funding available to sports organisations and for event attraction:

1. National/International Championships & Touring Incentive Grants

Grants to support sports organisations/clubs (from the state, nationally or internationally) to bid and host state-level, national or international events in the state, usually funded by state or commonwealth governments, but with some local councils/cities contributing significantly to event bidding.

In Tasmania, both Events Tasmania and Department of Community, Sport & Recreation (CSR) offer grants to organisations to support bidding and hosting championships. State incentive funding from Events Tasmania and CSR ranges from \$1,000 to \$6-\$7,000 per event. CSR's total incentive championship budget is approx. \$40,000 annually.

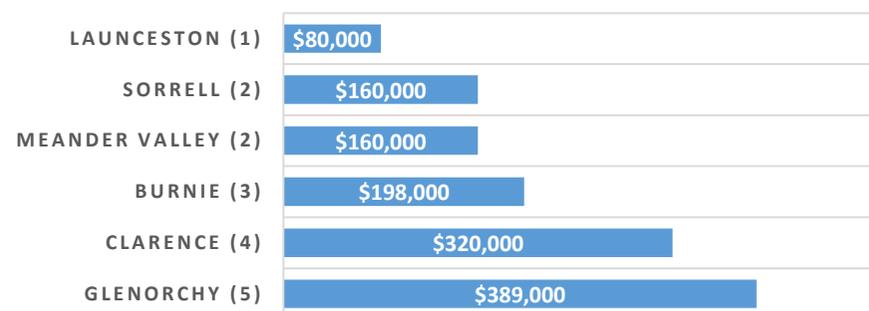
The CoL does not offer funding to sports organisations to support event bidding. The CoL does offer a Conference & Championship Incentives Program for the cool season, offering \$10-\$20 per participant registered from intra/interstate (between 1 May-31 September), with an annual budget of approx. \$20,000. However, these funds are rarely ever used and have not in its history contributed to championship funding. If CoL redirected these unused funds to championships it would immediately support event attraction bidding and events returning to Launceston.

Through preliminary comparative research it was also determined that many cities with sports attraction strategies (including Devonport, Ballarat, Bendigo, Warrnambool City, Murray Bridge, as per Section 6) all budget and contribute financially to event attraction bidding.

2. Infrastructure Grants

Grants to support local and national sports organisations to build infrastructure capacity of venues and support long-term sport growth, event development and meet national standards are funded by state government. CSR through its Major Grants Program (average annual budget of \$800,000) provides matching funds up to \$80,000 to support infrastructure and venue upgrades. Over the past five grant rounds from 2013 to 2017, of a total 81 awarded Major Grants, Launceston's success rate of one project at 4% (to resurface St. Leonards running track), with sporting venues/associations within the TNT region at 13%.

CITY COMPARISON MAJOR GRANTS 2013-17 (# SUCCESSFUL GRANTS & TOTAL \$ RECEIVED)



CSR provides a Minor Grant program to assist with minor upgrades and equipment purchases, with an approx. \$280,000 annual budget. Again, Launceston sports associations represented a 9% average success rate, with no successful grants received by CoL.

A CSR 2014 Snapshot Report on the Tasmanian Sporting Organisations (of 34 funded through the State Grants) identified the top three challenges, all of which are linked to financial and human capacity:

- Membership retention/increase (19.1%)
- Club governance/capacity/development/viability (13.8%)
- Volunteer recognition/increase/retention (10.6%)

This research revealed that many city councils are regularly successful and also support applications for sports associations to upgrade facilities, suggesting potential areas for further growth and development both within CoL and TNT role to support associations and further venue facilities upgrades and capacity.

3. **Event Development Grants**

Grants to local sports organisations to support event realisation, usually funded by local councils/cities, are also funded by national and state governments linked to interstate visitation and economic impact.

Currently there are several grant programs to support realising events in Launceston and the region, through Events Tasmania's Major Events Partnership (significant funding investment), One-off Assistance (up to \$20,000), Regional Events Start-up (up to \$150,000 over 3 years), and Marketing Tasmania (up to \$10,000) grants programs. Events Tasmania also offers Touring grants (up to \$15,000) per tour. Events Tasmania's total annual budget excluding Major Events Partnerships is approx. \$450,000.

In addition, CoL offers funding through its Signature Events (up to \$40,000), and various Events Grants (with a funding range up to \$20,000) programs. An assessment of the CoL funding program over 2012-2017 excluding Signature Events indicates an average annual overall budget of \$190,000 with a range of the highest at \$66,000 (38%) in 2013-14 (due to funding Launceston Cup in that year), to the lowest at \$27,000 (13%) in 2016-17 funding sporting events and championships that attract participation and visitation. The majority of events supported are community focused, not attracting visitation.

4. **Potential Sponsorship in Tasmania and Nationally**

A review of major sponsorship of sporting and championship events state-wide as well as those associated with national associations suitable for event attraction to Launceston revealed that sponsorship opportunities exist, but are subject to many variables.

Soliciting sponsorship in this dynamic and highly adaptable environment will require the development of business cases outlining the potential benefits

(both reputational and economic) of the specific event. It is prudent that any proactive sponsorship and fundraising for events must be in collaboration with the local and national sporting associations to develop an appropriate sponsorship plan and prospectus per sport and event, based on history of sponsorships and relationships within the sport, the unique event needs, high-profile participants involved, brand alignments and potential media exposure.

Examples of the kinds of sponsorship associated with Tasmanian and national sporting events and championships, include:

- **Product alignment with a specific sport:** related products and services aligned with the specific sport, location, and type of event
- **Local business sponsorship to promote community development:** businesses focus on connection to the local community
- **In-kind support:** related products and services aligned with the specific sport and event
- **TV/media:** usually requires televised or high viewership events
- **Destination brands:** when there is scope to build the destination and tourism brand of the region

Subject to a feasibility study with the national associations to determine the potential to become qualifying events and part of a national circuit, there is significant scope for Launceston and northern Tasmania to develop a series of branding opportunities in collaboration with venues specifically through the creation of new one-off or annual/biannual, etc. championship events. For example, the Launceston Swimming Series Championship, the Launceston Futsal Winter Championships, the Launceston Indoor Hockey Regional Championships, and the Launceston National Schools Regional Winter Championships, etc.

Insights from various state and national sporting associations identified the creation of new destination events in Launceston could support broadening visitation in the cool season, when bidding and hosting is out of the scope because of large-scale national championships in inner cities that make it difficult to compete for hosting.

GRANTS & SPONSORSHIP ANALYSIS KEY FINDINGS & RECOMMENDATIONS

35. Incentives grant funding programs for event attraction exist in Tasmania through Events Tasmania and CSR, and are a fairly straight forward application processes
36. Infrastructure grants are either vastly underutilised (or unsuccessful) by CoL and wider TNT region sporting venues/clubs. As many sports associations identified upgrades to support increasing needs and meeting national standards, this is an opportunity to increase venue capacity further to support long-term sporting event attraction and bidding
37. Ensure all associations and CoL know about, understand, and apply for funding for event bidding and hosting, and venue/club infrastructure development and suggests a need to support grant application submissions
38. CoL to consider existing grant programs and long-term strategies for event growth and sport development leading to increased visitation; an assessment of overall designation of funds between types of events: arts, community, sport, food with further designation of either community or visitation building focus, and thereby separate out community-focused funding for events from visitation/participation attracting events
39. Sponsorship for future events could be increased by the development of business proposal based on destination marketing, media exposure, brand alignment, potential visitation increases, social impact and ROI. The sports associations in their role as hosts of major sports events would benefit from guidance and support from a centralised TNT role acting as facilitator and manager of sponsorship strategy across the region's sporting events
40. CoL to consider investment in event attraction through funds to support bidding and hosting of events and championships

See Appendix 4: Current and Potential Grants for an overview of Tasmanian grants available for major sporting events.

See Appendix 5: Current Sponsorship Investment of National Sporting Associations for a listing of sponsorships associated with national sporting associations.

6. COMPARATIVE CITIES ANALYSIS

Research was conducted on comparative cities and regions nationally that actively attract events to determine gaps and opportunities for Launceston event attraction by identifying where possible benchmarks for attraction strategies and insights into visitation and economic impacts.

Research was by direct contact and reviewing available strategies and reports. Given the timeframe, findings are based primarily on insights to existing strategies and outcomes, as hard data on numbers was not available.

Research was broken down into two categories: comparable cities or regions to Launceston that have demonstrated success event attraction strategies, and comparable venues nationally to UTAS Stadium, Silverdome and Elphin Sports Centre to compare event attraction usage and strategies.

COMPARABLE CITIES & REGIONS WITH SUCCESSFUL EVENT ATTRACTION

Cities and regions were identified as comparable to Launceston based on their population size, scale of major venues, capacity to host events, and average annual visitation. Additionally, several smaller regional cities and regions nationally were identified as actively attracting events, with successful attraction strategies to provide benchmarks for best practices and identify potential event attraction strategies useful to Launceston and the region. As well, various larger cities and regions were reviewed for comparative purposes to assess event attraction strategies in general.

According to the Australian Bureau of Statistics, Launceston has a population of approx. 86,000 and serves a wider population of approx. 120,000. It is the 21st largest city in Australia, 12th largest regional city and 2nd largest city in Tasmania to Hobart. It has direct services by air, and access to ferry service 100km in Devonport.

Ballarat, VIC: (Pop. Approx. 103,000, 105km from Melbourne) Ballarat Council employs 2 FTE staff persons in events (through Visit Ballarat) to specifically

support event development, success and growth, and event attraction and procurement.

Ballarat is currently undertaking a 20-30-year visitor investment plan to project what sort of investment and infrastructure will be required for long-term visitor economy growth, including an assessment of its sporting and event facilities. Ballarat takes a collaborative approach across council departments for event attraction and implementation, and provides ongoing support to sporting associations through capacity building, and acts as a 'conciierge' between sporting associations and the city and venues to ensure high quality events and visitor experience.

Ballarat don't use sports marketing agents and prefer to work directly with associations, and have demonstrated huge success as the primary contact for all enquiries about events in the city and region, creating a streamlined approach and ensuring potential event hosting is maximised.

Ballarat Council provides an annual budget to support existing events and to attract new events. Ballarat has hosted the following major events: Victorian Short Course Swimming Championships 2015 & 2016, Cycling Australia Road National Championships (commitment to 2020), Ballarat Swap Meet (annual), Ironman 70.3 Ballarat (annual), BMX Round 1 Victorian Open, Victorian Teachers Games (3,000 participants over 3 nights), and the PGA National Futures Championships (3-year commitment).

Bendigo, VIC: (Pop: approx. 111,000, 150kms from Melbourne) Bendigo initiated sports events attraction for over three years and as a result has hosted 12 state and national sporting events, making a substantial impact on the local economy and branding of the city. They also noted that the events have supported greater professional development of their local sporting associations furthering relationships, membership and fundraising opportunities.

Devonport, TAS: (Pop: approx. 30,500, 100kms from Launceston) Since 2012, Devonport Council has actively supported event attraction through an ongoing

annual budget for event attraction incentives and bidding. Devonport employs 1 FTE staff person (in Council Sports & Rec) who oversees all venues and event attraction and management.

Their ROI has seen a dramatic rise in events hosted annually in Devonport, increased visitation that extends into the surrounding region (including Launceston), and can be evidenced by their October 2017 co-hosting of the Australian Masters Championships, which will see upwards of 5,000 of participants on the NW Coast. Winning this bid by Cradle Coast Authority was the result of several years of dedicated event attraction, negotiation with state sporting organisations to increasingly host events in Devonport and the NW Coast, and a strategy driven by the Mayor who attracted the support of others to finance a collaborative bid.

The following is a brief list sporting events Devonport has procured since 2012: 2017 National Masters Championships (4-5,000 participants over 7 nights), 2017 Futsal Islanders Cup, Devonport Triathlon, Tour of Tasmania, National Soccer Championships and Program (secured 3 years), 2017 National Indoor Bowls Championships, Peak Challenge, Basketball Championships, and the Tasmanian Squash Open.

Furthermore, as part of Devonport Council's ongoing support of event attraction, and recognising the ROI, long-term venue upgrades, including recently completed \$1m soccer synthetic pitch upgrade, alongside infrastructure upgrades and new builds are planned over the coming years to support event attraction and hosting larger scale events.

Murray Bridge, SA: (Pop: approx. 20,000, 75kms from Adelaide) The rural city Murray Bridge identified events, and sporting events as a key strategy to develop tourism in the region in their 2013 Sport & Rec Strategy. Since 2014 they have attracted 15 events to the region, with the largest being the 2016 SA Masters Games with over 850 participants.

Warrnambool VIC: (Pop: approx. 34,000, 200kms from Geelong on Great Ocean Road) After conducting an audit of their sporting infrastructure as part

of their Strategic Plan to increase the visitor economy, they initiated an events attraction strategy to attract state and regional sporting carnivals and championships, and have since hosted key sporting events in lifesaving, soccer, cricket, lacrosse, softball, lawn bowls and cycling. In the two years from 2009-11, WCC directly invested \$27,000 in sporting event bidding and yielded over \$1m in economic impact.

Overall, many regional cities are investing in sporting events and championships as a means to attract visitation, extend visitor stay, and develop greater pride of place and maximise the unique elements of the city as part of a greater destination branding and attraction plan, as discussed in Section 3.1 National Events Market.

In all the cases reviewed, the cities clearly invest specifically in sports events bidding and hosting costs have at least one senior staff dedicated to event development and procurement, and sports event attraction forms a significant part of their overall events strategies that in turn support their community and economic development plans.

COMPARABLE VENUES

Based on the uniqueness of Launceston's major venues, a comparison of cities and regions with major venues comparable to: UTAS Stadium, Silverdome, and Elphin Sports Centre was conducted to assess usage, strategy and management with respect to sporting event attraction.

UTAS Stadium: Observing similar-sized venues, an analysis of venues comparable to UTAS Stadium related to the national sport market centred on Geelong's Simonds Stadium (formerly Kardinia Park stadium), Ballarat's Eureka Stadium and Adelaide's Titanium Security Arena.

The main findings of the review indicated that most major venues are part of strategically developed large-scale sports complexes as part of extended sports precincts that meet holistic sports development plans as part of wider city development strategies. These all lead to greater numbers of courts/arenas available for larger championships. Such complexes include

event development as a key component, as evidenced in the 'Ballarat Major Events Precinct Master Plan'. The management and operational structures of the venues analysed also include support by staff solely focused on event attraction and event development.

Geelong in particular has a wider range of venues suitable for community participation usage, enabling the major venues to focus on hosting large-scale events and competitions.

Silverdome and Elphin Sports Centre: Currently Elphin Sports Centre has 4 courts suitable to host championships, while Silverdome has the capacity to host 2-3 large courts, which limits usage for larger-scale events. Comparable cities of Bendigo and Ballarat own and run newly developed major sports complexes with 12 courts available and both are currently undertaking further development works. A consideration as noted above is to review how Silverdome and Elphin Sports Centre could work together under the same management system, and operate collaboratively to expand available court usage.

COMPARATIVE CITIES & VENUES KEY FINDINGS & RECOMMENDATIONS

41. **Successful event attraction strategies nationally have been fully supported by councils, with all departments working collaboratively to achieve long-term event attraction goals**
42. **Other comparable cities contribute financially to support event attraction strategies with funding for staff, event bidding, event incentive programs, venue in-kind support, event and association development, and ongoing infrastructure upgrades to support increased usage and event attraction**
43. **Successful event attraction is typically managed by designated staff (usually within separated event development or sports and rec departments) who have developed close working relationships with all venues as well as local, state and national sporting associations, and actively support developing and building their capacity to host and manage championships and one-off events**
44. **All staff working in event development and procurement were senior positions with extensive experience working in the sporting industries and can direct high-level strategies and negotiations at government and political levels to support procurement**

7. POTENTIAL VALUE & BENEFITS

To return to the key objectives of the research project and summarise findings, there is scope, capacity and resources that could be better leveraged:

- Most major venues have the capacity to meet national standards
- Sporting associations are willing to host events and championships
- The CoL and region has the capacity to host increased visitors
- The current events calendar has the capacity to hold increased events
- The national event market is large enough to accommodate attracting suitable events to Launceston and the region
- There are funding and investment options at the local, state and national levels that support event attraction and infrastructure development, and
- Comparative cities have demonstrated success with event attraction.

Based on the research conducted it is evident there is potential value and economic and social benefits to event attraction and sporting event legacy in the long-term, including:

- Increased collaboration among the key stakeholders
- Increased communication, networking, and overall strategy and support to sports organisations for event bidding and staging
- Increased venue usage
- Increased funding application submissions to support infrastructure and venue capacity and upgrades to remain highly competitive
- Increased performance standards of Launceston and its sport associations
- A well-rounded and varied events calendar, with new and repeat events
- Reinstated lost rotational events to Tasmania due to increased human capacity and administrative support in the bidding processes
- Increased visitation, tourism and length of visitors' stay
- Increased profile of Launceston as a host destination for sporting events
- Increased profile as a welcoming city to participants and visitors
- Increased local business engagement and opportunities for investment
- Increased pride of place, volunteering and community engagement, and
- Increased health and wellbeing through increased participation in sport.

8. FINAL RECOMMENDATION

Investment in the creation of a 1.0 FTE position over three years, and it is our estimation that a position any less than this would perpetuate existing limited capacity. A review of comparable positions indicates a salary range at Level 10 or 11 at local government rates, (Fairwork Australia Commission records the wage of Level 10 at minimum of \$55,000). The recommended annual salary range is \$60-\$90,000.

Positioning the role at TNT enables an alignment with tourism and visitation objectives, and provides an arms-length position when negotiating incentives with Council or state governments, and working with venues and associations. The role would be responsible for overall regional sporting event attraction strategy and event attraction destination branding; calendar management; provide support to associations on bidding, funding applications and event procurement; create networks between associations, clubs, venues, funders, and potential sponsors; key stakeholder communication; support association capacity building to increase long-term event hosting growth; support venue infrastructure development funding; and advocate for incentive funding at local and state levels. The following is an outline of potential three-year focus:

2017-18, Year 1: Establish networks and create infrastructure

Continue researching and data gathering, liaise with and build relationships with sporting associations, develop key stakeholder groups, support associations hosting events, and begin long-term strategy development and immediate procurement bidding for Year 3 and beyond.

2018-19, Year 2: Destination marketing, bidding and fundraising

Build the brand of Launceston and the region as a destination for sporting events, increase bidding capacity; support any new events underway for Year 3 and beyond, and initiate fundraising capacity.

2019-20 Year 3: Bidding and fundraising ongoing, capacity building

Fully developed bidding process and attracting events for beyond Year 5, initiate venue upgrades assessments, funding options and long-term strategy.

TABLE 3: EVENT ATTRACTION KEY STAKEHOLDERS & ROLES

STAKEHOLDER	EVENT ATTRACTION ROLE
TNT	<ul style="list-style-type: none"> Manages event attraction strategy and calendar Works with sports associations and funders to submit bids, supports funding applications, to procure events Acts as liaison between all key stakeholders Acts as primary point of contact for all event hosting enquiries in northern Tasmania Collects all event and visitation data and statistics Supports destination marketing of Launceston and region for sporting events in national marketing strategies
City of Launceston (CoL)	<ul style="list-style-type: none"> Oversees an integrated whole-of-council approach to event attraction, adhered to by all departments/venues Invests in funding to support bidding, incentives, sport development, and event management Invests in venues and city infrastructure to support increased usage and event attraction
Events Tasmania	<ul style="list-style-type: none"> Funding for incentives, event bidding and touring
Communities, Sport & Recreation Tasmania	<ul style="list-style-type: none"> Funding for infrastructure and sport development, event and championship hosting, sporting association operations
Local/State Sports Associations	<ul style="list-style-type: none"> Host events locally; event coordination and evaluation Identify potential events for bidding and attraction Supports professional development of sports locally
National Sports Associations	<ul style="list-style-type: none"> Manage national bidding and event rotation Identify potential national funding and sponsorships
Major Venues (including CoL and State owned and leased)	<ul style="list-style-type: none"> Provision of venues and facilities to meet strategy goals Ensure venues are available for events (suitable to venue requirements or restrictions – i.e.: AFL season) Maintain venues to meet national standards and identifies infrastructure investment needs for improvements
Cityprom Launceston	<ul style="list-style-type: none"> Supports event organisers to enhance participant experience by providing marketing materials (where to stay/eat/play), business networks, and welcome events that increase profile and attraction for participants Delivers cooperative marketing and communications to local businesses to increase engagement in events

9. APPENDICES: WORKING EXCEL DATABASES

To facilitate knowledge transfer and support event attraction development, a suite of appendices accompanies this Final Report in the form of working excel databases. They include:

1. Venue Capacity & National Championship Standards
2. Events Calendar 2010-2020 Database (Launceston and North) & Events Tasmania funded events and amounts
3. Example Potential Events to Attract
4. Current Potential Grants Funding & CSR and CoL funded events and amounts
5. Current Sponsorship Investment of Sporting Associations
6. Key Contacts Database

THANK YOU

Thank you to the project partners, sporting associations, Tasmanian and interstate cities and governments, venues, tourism and local business bodies, accommodation, transport and hospitality providers, and sports management agencies for information and insights into the Cool Season Events Research Project.

PROJECT TEAM

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Wendy Newton	City of Launceston
Heidi Flood	Events Tasmania
Scott Woodham	Silverdome Launceston
Robert Groenewegen	UTAS Stadium
Vanessa Cahoon	CityProm

10. APPENDICES: LAUNCESTON AIRPORT CAPACITY REVIEW (MAY 2017)

FOR TNT COOL SEASON RESEARCH PROJECT
BY NATALIE DE VITO & LAURA RIPOLL GONZALEZ

INFORMATION PROVIDED BY PAUL HODGEN, GENERAL MANAGER, LAUNCESTON AIRPORT

CURRENT CAPACITY

The Launceston airport terminal currently handles 1.33m passengers per annum but has the capacity to handle approximately 1.75m passengers per annum. Launceston Airport is located 15 kilometres from the city and operates on a 24 hour basis, providing facilities for the operation of regular passenger transport aircraft of up to (Code C) size (A321, A320 and B737 aircraft)

The airport site has a land area of 180 hectares (480 acres). There is a single paved primary runway, 1,981 metres in length, which has been overlaid during early 2015 and two grass runways which are currently closed. Five parking positions are available for regular passenger transport aircraft in front of the main terminal and a further single parking position in front of the regional terminal is used by Sharp Airlines. Parking for freighter aircraft and general aviation aircraft is also available on the southern apron.

The main terminal building provides 12 check-in desks, two self-check kiosks and a Q-card reader, accommodating Qantas, Jetstar and Virgin Australia. A security screening facility (with two X-Rays) provides screening services, leading to two gate lounges, serving four arrival/departure gates. There is one frequent flyer lounge operated by QantasLink. There are five food/beverage and retail outlets operating in the terminal. The arrivals area comprises two baggage carousels and a multi-tenant car rental facility accommodating Hertz, Europcar, Thrifty, Redspot, Avis, Budget (with other off-airport operators such as APEX and Bargain Car Rentals). Launceston Airport has a short term car park comprising 400 bays, and a long term car park capacity of approximately 1,073 bays, including 120 in an undercover car park which opened in late 2014. An additional 135 bays are dedicated to car rental operations. From the ground transport perspective, the airport is serviced by taxi operators the largest operator being Taxi Combined. The "Airporter" shuttle bus service operates between the Launceston Airport and the CBD, Launceston hotels and accommodation, including the Casino, servicing all aircraft departures and meeting all arrivals.

The airport has been awarded the Australian Airports Association "Major Airport of the Year" for the past two consecutive years.

RECENT UPGRADES

The airport recently completed an \$11.5m overlay to its runway and also unveiled a \$3.5 million terminal transformation project comprising a 600-square metre expansion of the terminal, featuring a total transformation of the airport dining and retail facilities. As part of this project, Launceston Airport has also introduced free Wi-Fi for passengers and visitors to the terminal, along with additional charging points for phones, tablets and laptops. These are located in the new dining area, housing the Boags Upper Deck Bar and Hudsons Coffee and Wilderness Espresso Café. A further Hudsons Coffee café is located in the gate lounges. "The Launceston Store" provides visitors and travellers with a high quality, creative, quintessentially Tasmanian retail offer. The store has a strong focus on local produce including Tasmanian gifts, along with gourmet food and wine from the region. The centrepiece is a 1948 Austin Ute driven straight from the farmers market stocked with local produce!. The store also stocks travel essentials, including newspapers, magazines, books, drinks and snacks along with an in-shop 'tech2go' for tech accessories and luggage.

Table 1: Domestic pax by month – Launceston 60% variance low to high months

Demonstrating seasonal variation and capacity for growth in winter/cool season

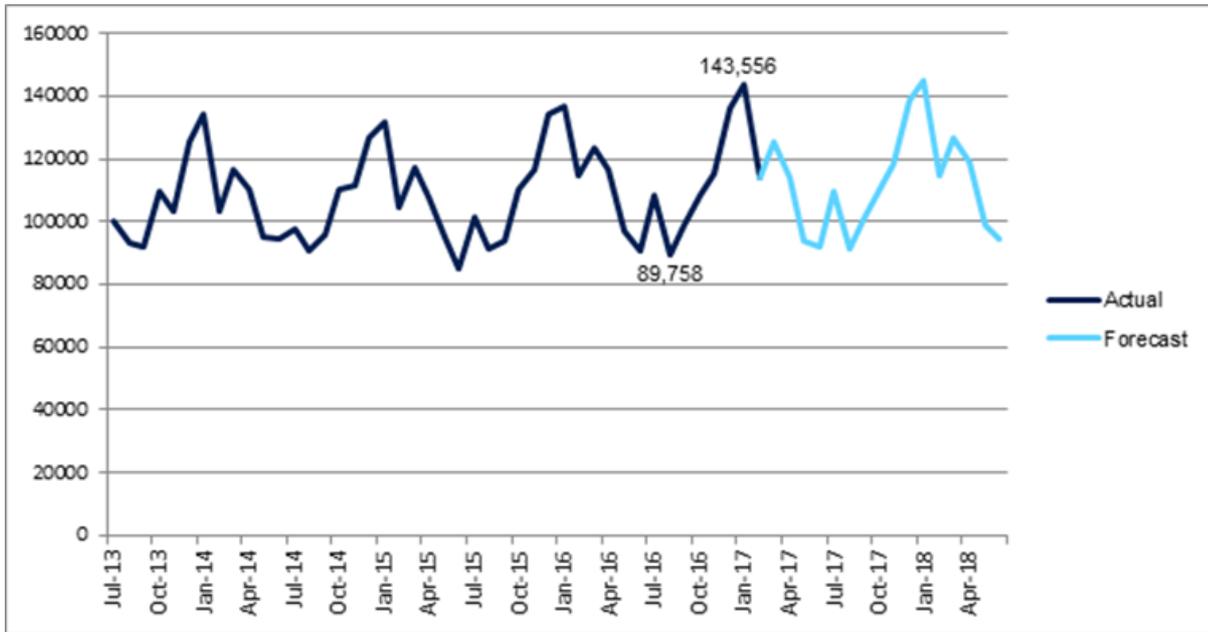
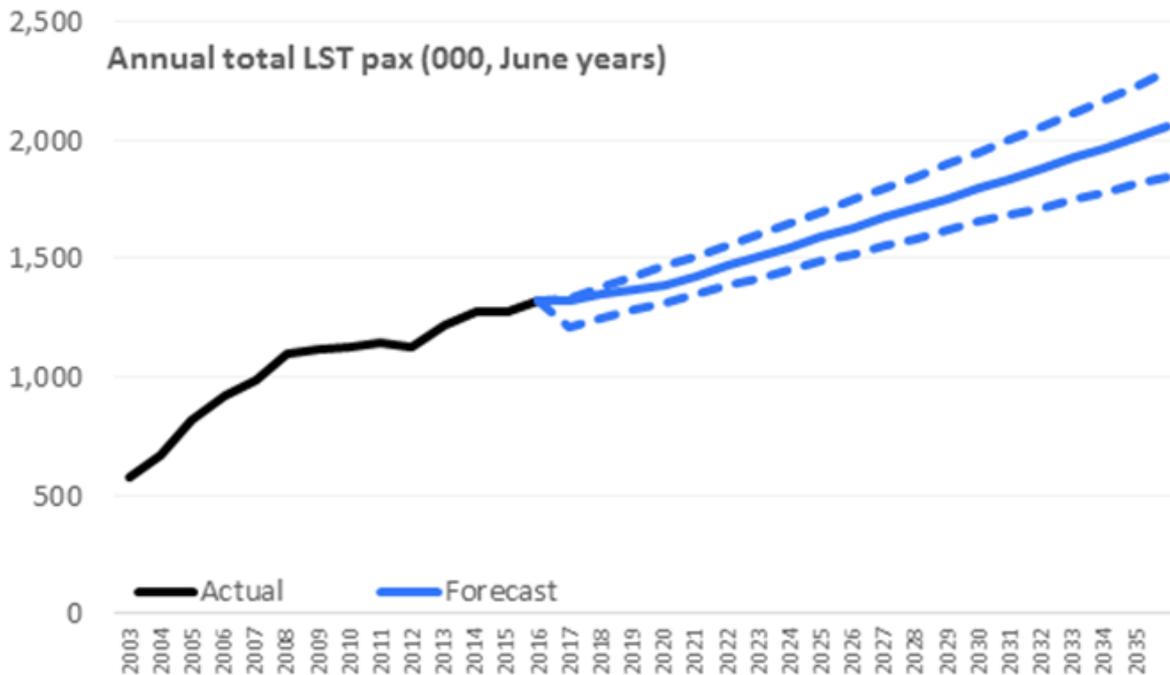


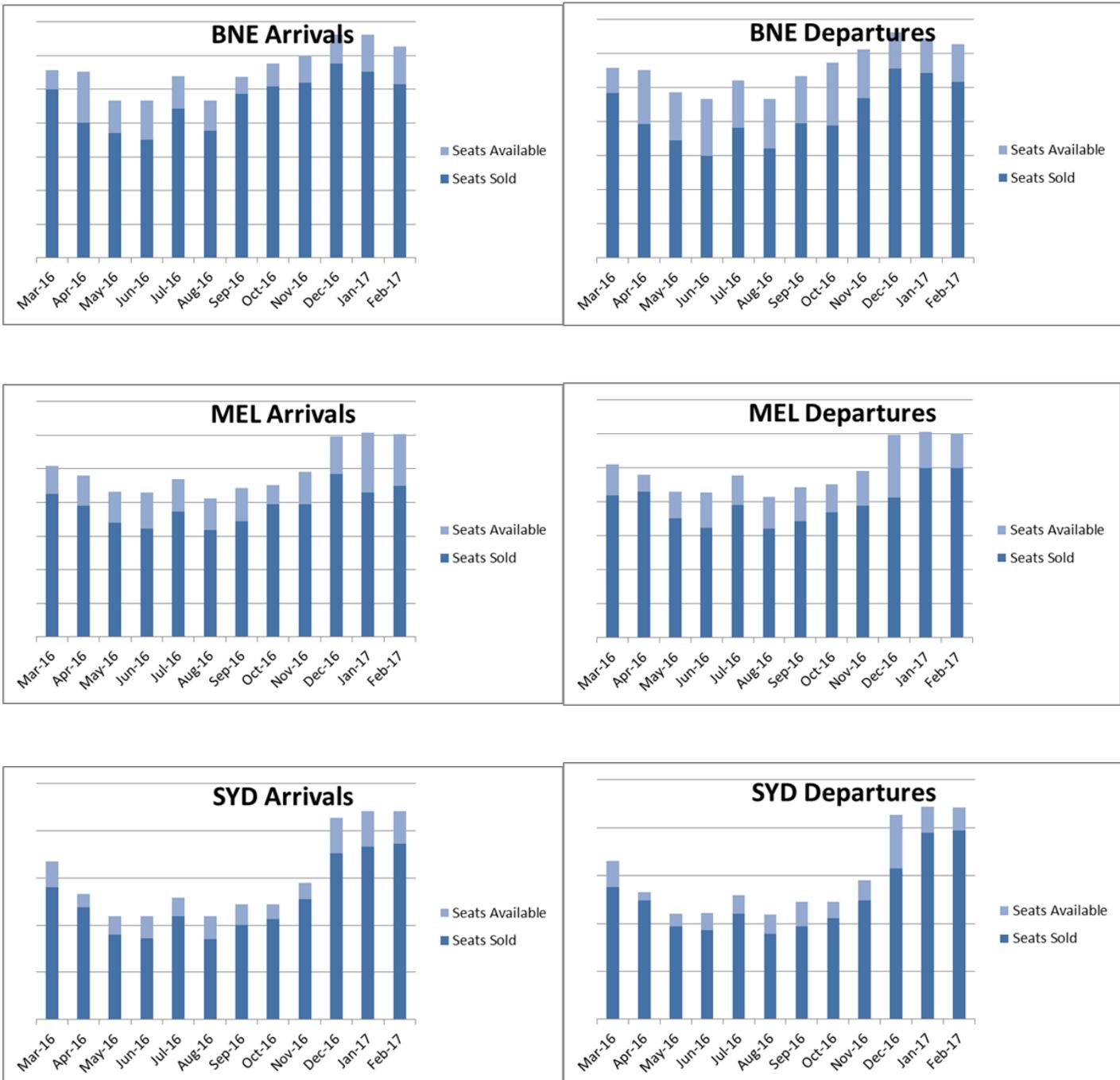
Table 2: Annual total LST pax (000, June years) with projections (High and Low) demonstrates continued growth trajectory, and capacity growth projections of visitor numbers through Launceston Airport



AIRLINE CARRIER CAPACITY

The following data available includes (a) seats offered and (b) passengers carried data by route (Brisbane, Sydney, and Melbourne) by month for March 16 to February 17. This data demonstrates significant available capacity across all major carriers over the year and between all major direct flight cities.

Please note that the graphs between cities are not comparable (the number scales are different for each city).



INFRASTRUCTURE RE/DEVELOPMENT CURRENT & FORECASTED

Detailed forecasts and infrastructure information can be accessed in the Launceston Airport 2015 Master Plan. (<http://www.launcestonairport.com.au/2015-master-plan>).

As far as the planned infrastructure pipeline is concerned, the following are the key elements:

Project name: Terminal Airside Boundary Relocation

Indicative Value: \$1.8 million
Primary Driver: Level of Service
Stage of Project: Detailed Design
Start/Finish: March 17-Sep 17
Beneficiaries: 1.3 million passengers/tourists; Airline operators

Project name: Runway and Taxiway works

Location: Launceston Airport
Indicative Value: \$2.2 million
Primary Driver: Maintenance
Stage of Project: Concept
Funding: Full Internal
Expected Start/Finish: Jul 2018- Nov 2018
Beneficiaries: 1.3 million passengers/tourists; Airline operators

Project Name: Check-in Automation

Location: Launceston Airport
Indicative Value: \$750,000
Primary Driver: Level of Service/Growth
Stage of Project: Concept Development
Funding: Full Internal
Expected Start/Finish: 2018
Beneficiaries: 1.35 million passengers/tourists; Airline operators

Project Name: Replacement of Baggage conveyor

Location: Launceston Airport
Indicative Value: \$2 million
Primary Driver: Maintenance
Stage of Project: (Master plan)
Funding: Full internal
Expected Start/Finish: July 2019 – Nov 2019
Beneficiaries: 1.4 million passengers/tourists; Airline operators

Project Name: Construction of Gate 1 Lounge

Location: Launceston Airport
Indicative Value: \$1.6 million
Primary Driver: Growth, Level of Service
Stage of Project: (Master Plan)
Funding: Full Internal
Expected Start/Finish: Jul-2019-Nov-2019
Beneficiaries: 1.4 million passengers/tourists; Airline operators

Project Name: Terminal Apron and Forecast Extension

Location: Launceston Airport

Indicative Value: \$11 million
Primary Driver: Growth; level of Service
Stage of Project: N/A (Master Plan)
Funding: Full Internal
Expected Start/Finish: May 2020- Nov 2020
Beneficiaries: 1.5 million passengers/tourists; Airline operators

Project Name: **Gate Lounge 4**
Location: Launceston Airport
Indicative Value: \$2 million
Primary Driver: Growth; level of service
Stage of Project: (Master Plan)
Funding: Full Internal
Expected Start/Finish: Mar 2021 - Nov 2021
Beneficiaries: 1.55 million passengers/tourists; Airline operators

Project Name: **Car Park Expansion**
Location: Launceston Airport
Indicative Value: \$1.5 million
Primary Driver: Growth/Level of Service
Stage of Project: (Master Plan)
Funding: Full internal
Expected Start/Finish: Mar 2021- Nov 2021
Beneficiaries: 1.55 million passengers/tourists; Airline operators