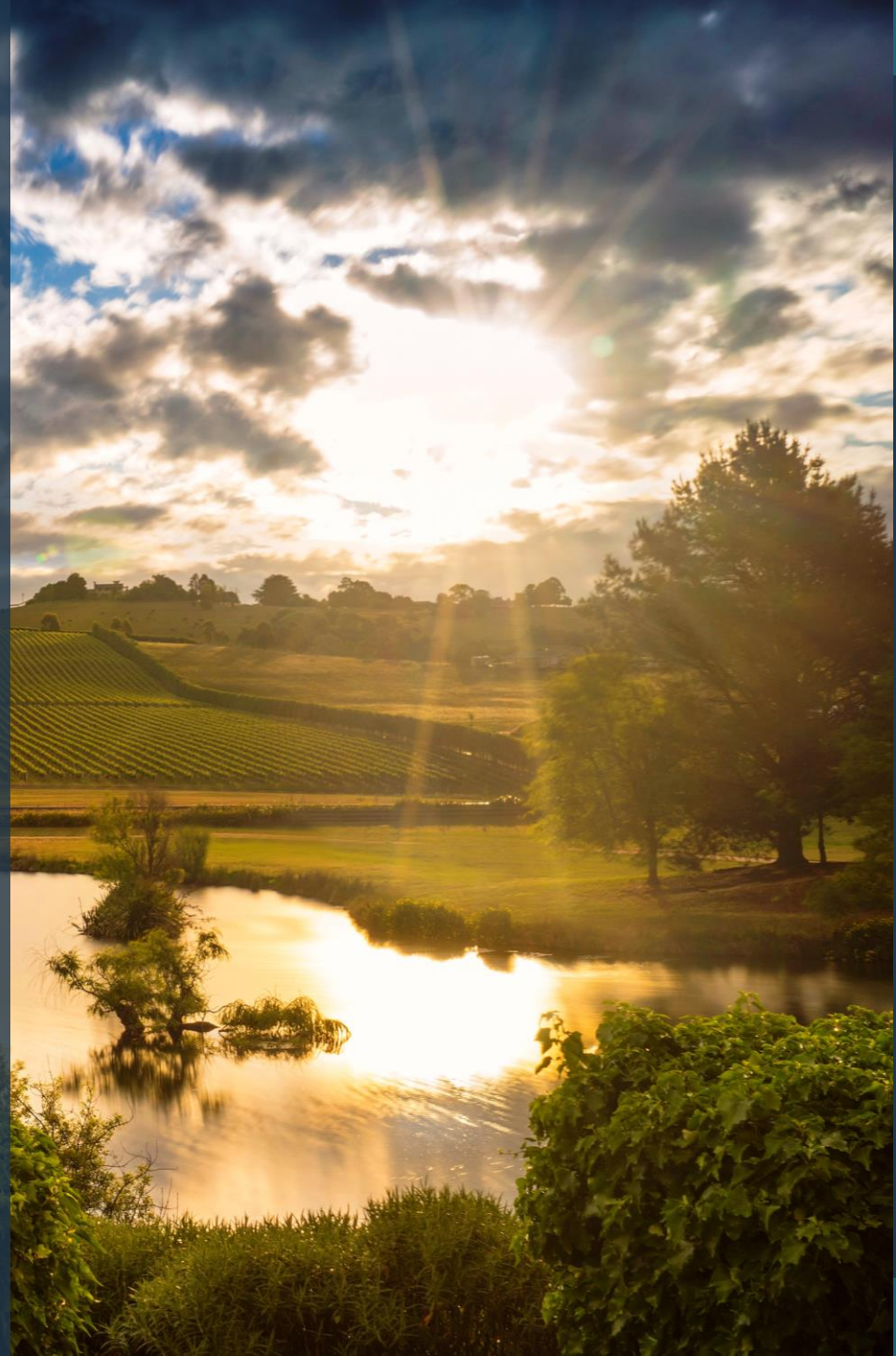




City of Launceston DNA Analysis

Table of contents

1. Introduction
2. Our DNA results
3. Perceived
4. Projected
5. Observations
6. Conclusion



How did we get here?

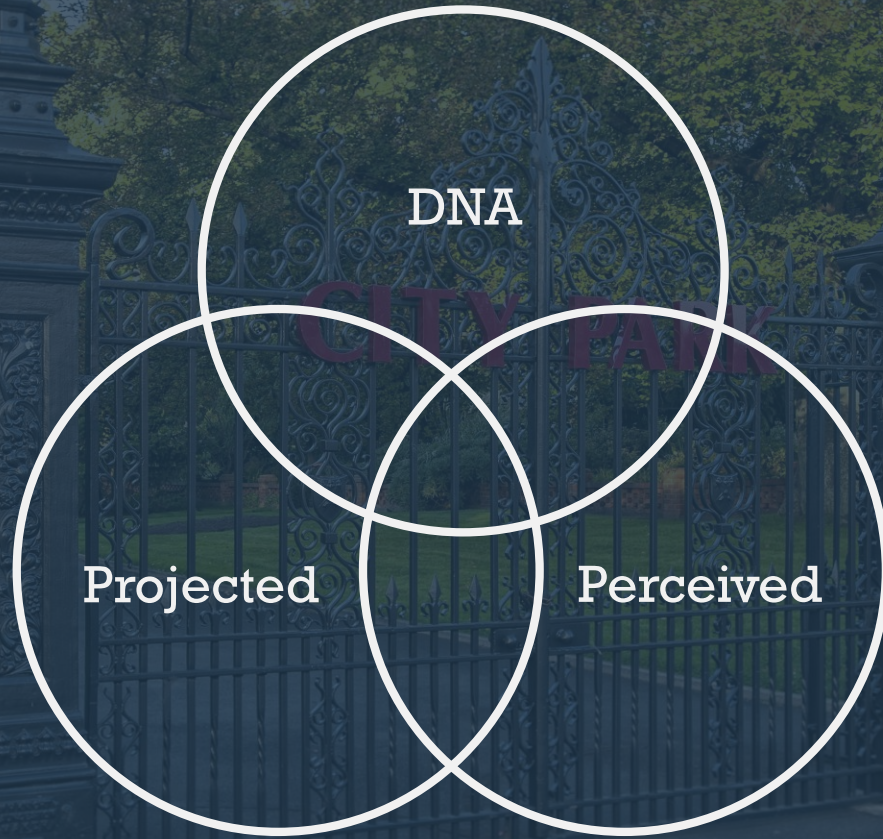
- Past Launceston brand unenduring
- Commissioned Destination Think! based on Place DNA research methodology
- Why Place DNA?

Uncovers the truth of a destination and what makes it unique based on intrinsic attributes including culture, geography, climate, natural environment and economy

The perils of ignoring your DNA:

- 1) Non-validation of your work (loss of authenticity).
- 2) The truth of your communication (loss of credibility).

Place DNA explained



What is DNA?

1

The core identity of
your place.

2

The sense
of place.

3

The epicenter of all
experiences and
stories that your
place generates.

DNA process



Place DNA



Projected DNA

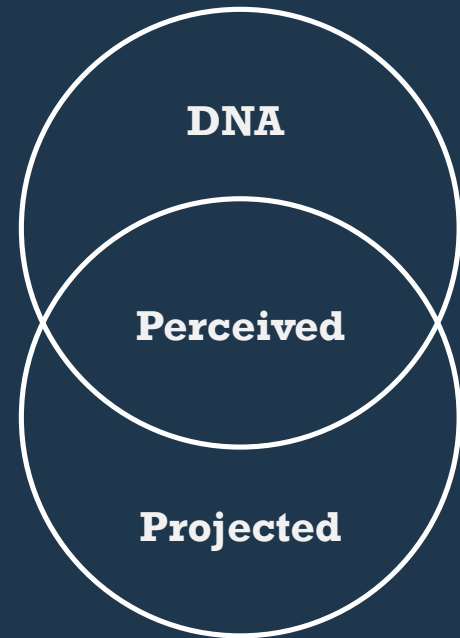
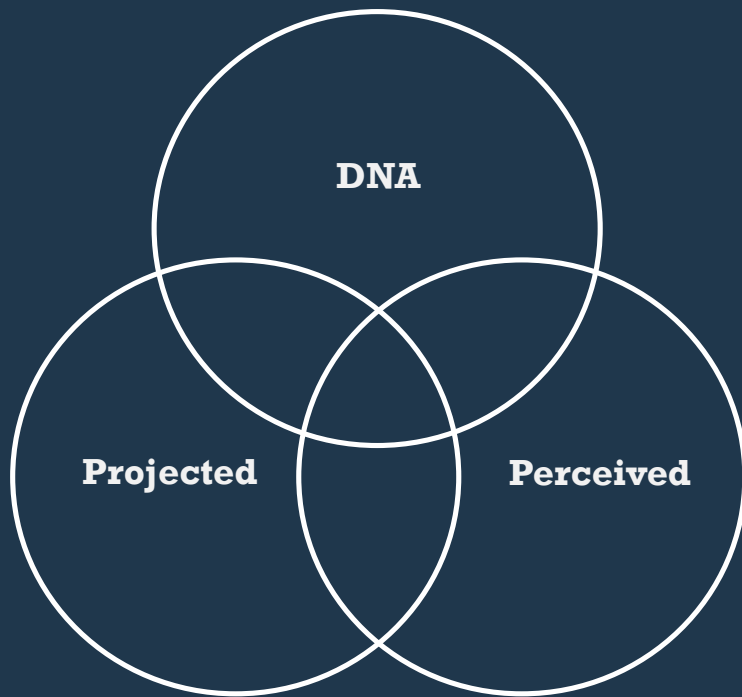


Perceived DNA

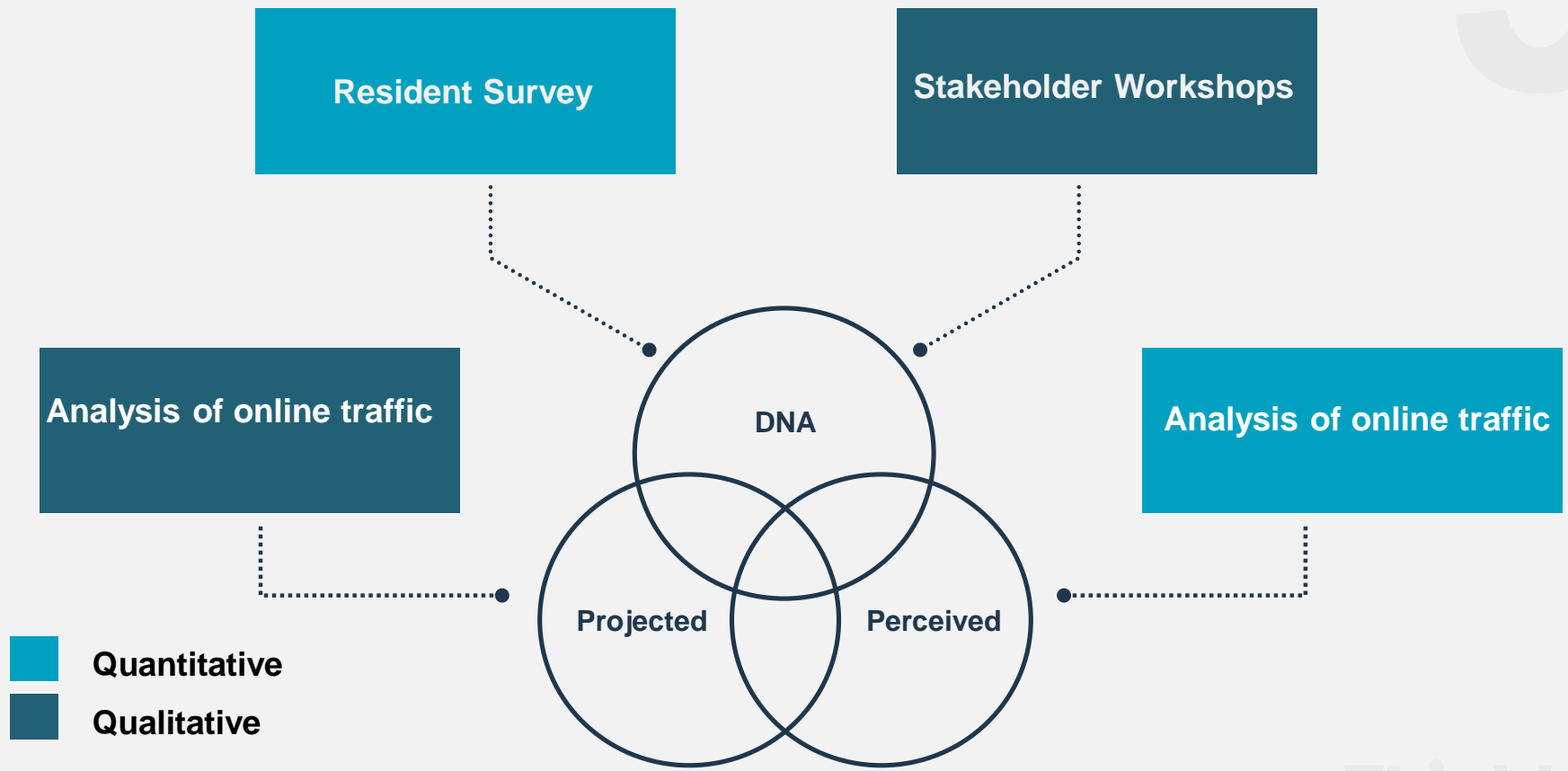


Gap Analysis

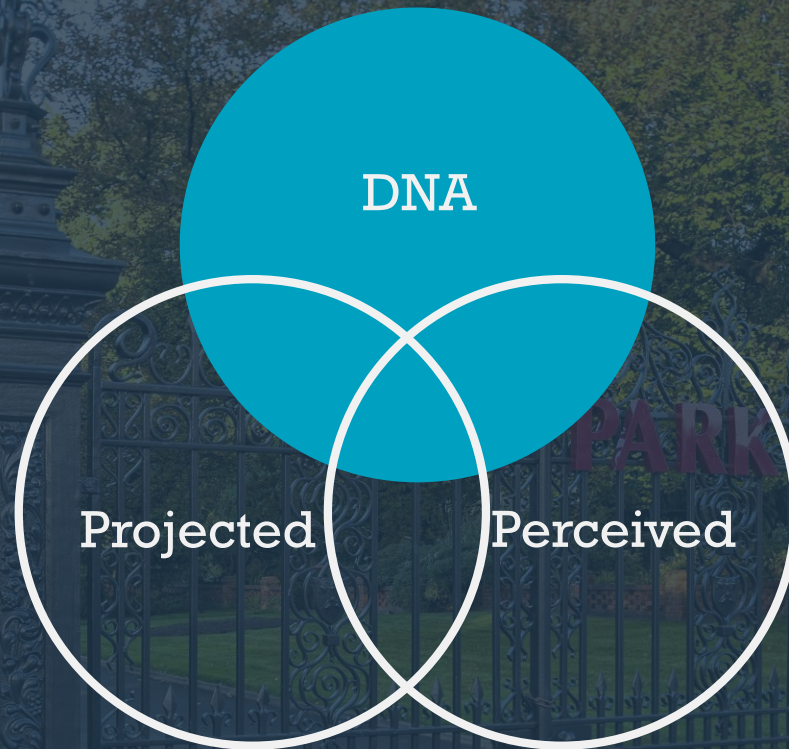
The more alignment, the stronger your reputation



The local research process



2. Our DNA results



How do people who live in Launceston experience Launceston?

What makes Launceston, Launceston?

Who is Launceston?

Resident Survey

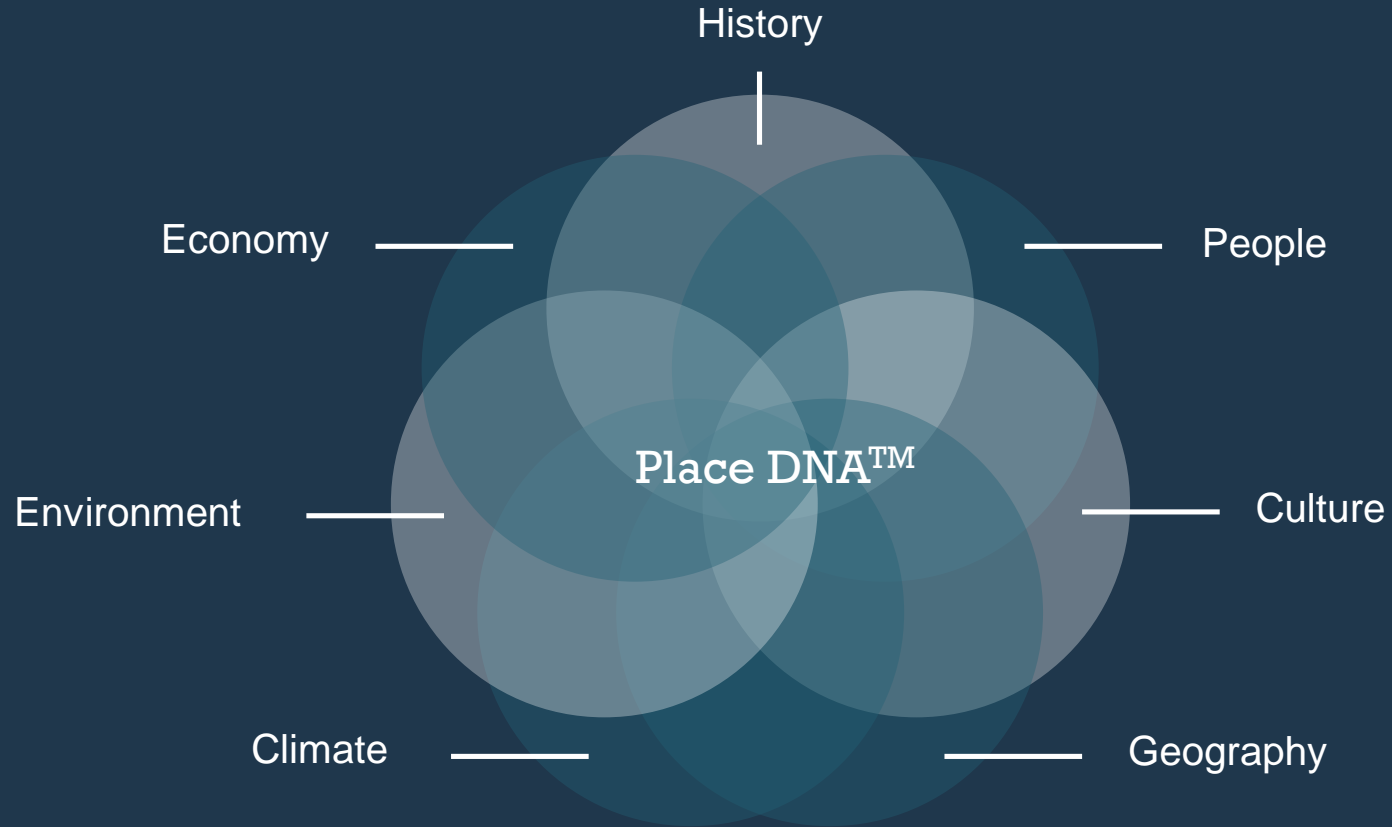
Residents of Launceston were asked for their opinions on Launceston through an online survey (live from June 2018).

In total, 674 residents responded to the survey. This met the quota that was set for 383 responses, assuming a normal division of 50%, a margin error of 5% and a confidence level of 95%. The high number of responses brought the confidence level to 99% that makes the survey extremely significant.

Good range of respondent ages and suburb representation.

Majority (73%) of respondents have lived in Launceston for more than 10 years

Resident Survey – themes of questions



Place DNA™ elements



Environment

The impact of all living species, climate, weather, and natural resources on a place.



Infrastructure

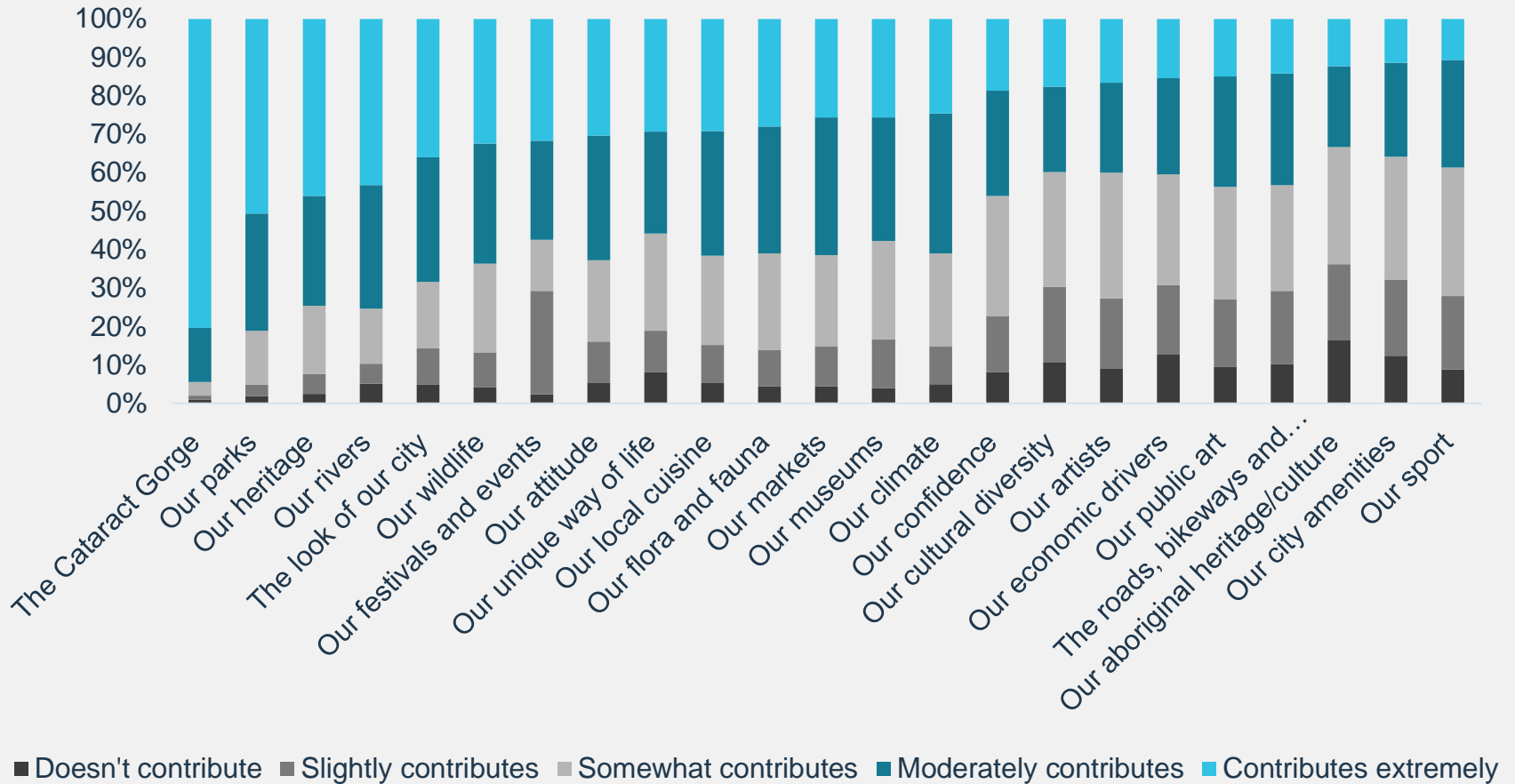
The impact of physical structures and facilities built by humans on a place.



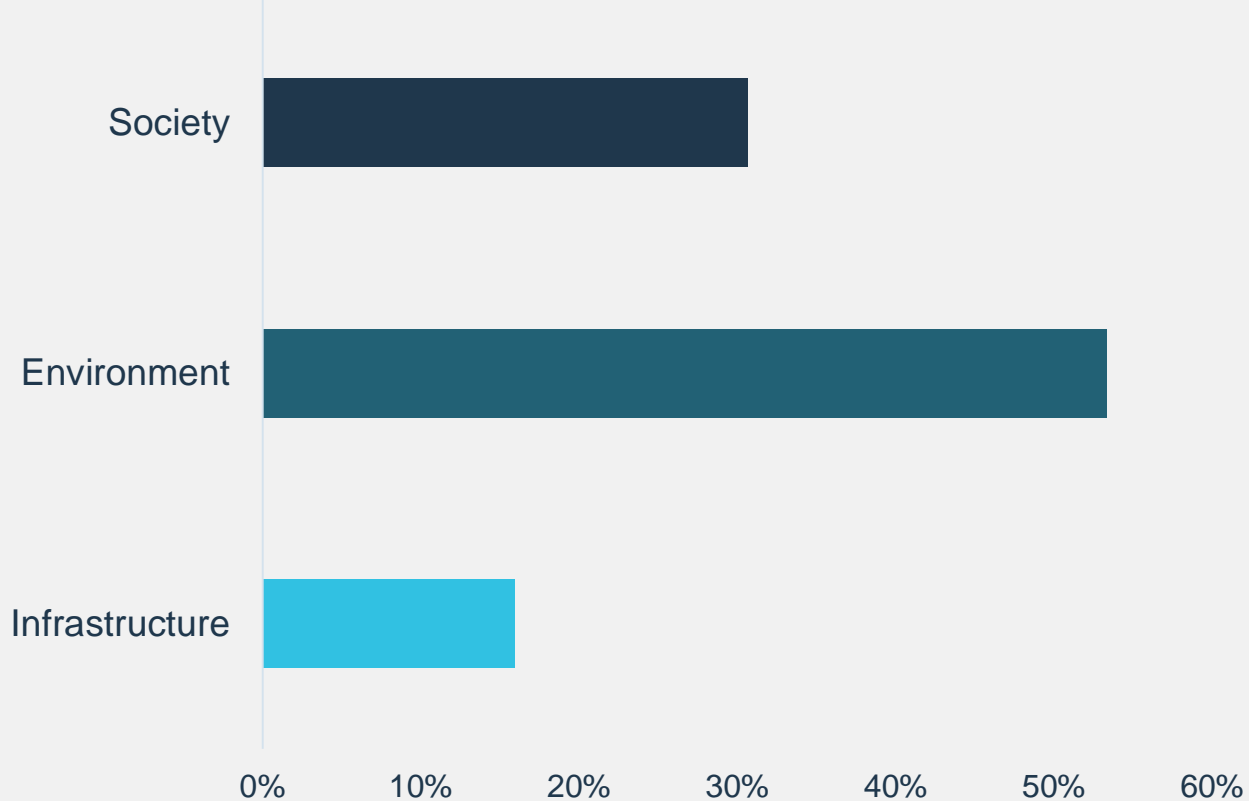
Society

The impact of people's values, history, norms and behaviors on a place.

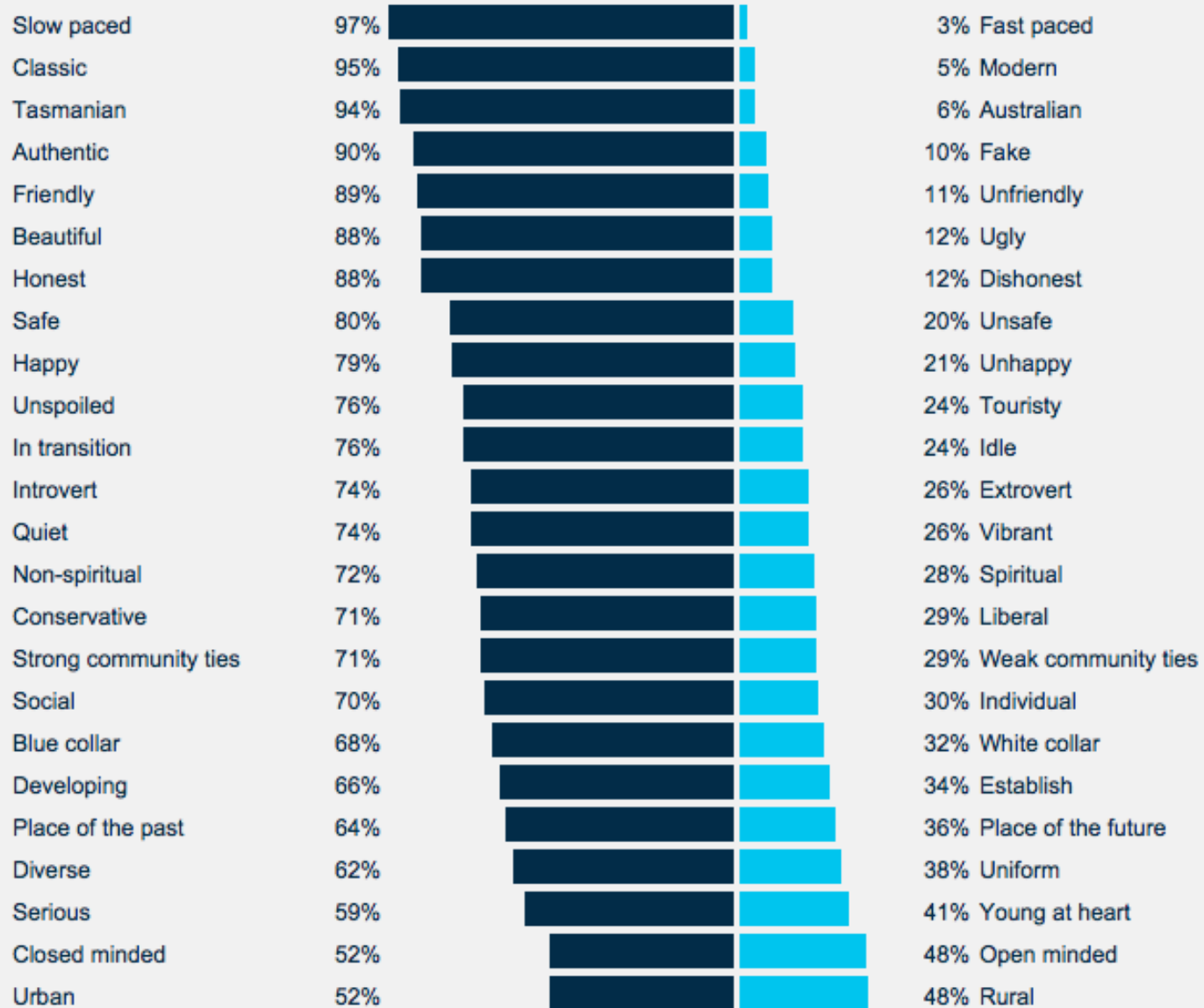
What makes Launceston, Launceston?



What makes Launceston, Launceston?



What is Launceston for our residents?



Analysing influencing attributes

Result	Percentage
Developing	66%
Established	34%
Quiet	74%
Vibrant	26%

Result	Percentage
Diverse	62%
Uniform	38%
Open-minded	48%
Closed-minded	52%

Strong, clearly agreed attributes

Result	Percentage
Strong community ties	71%
Weak community ties	29%

Result	Percentage
Urban	52%
Rural	48%
Young at heart	41%
Serious	59%

Less decisive agreed attributes

Resident Survey – Place Personality

5 types of place personality (with example cities)



Agreeable (Dublin)



Neurotic (Hong Kong)



Extravert (Amsterdam)



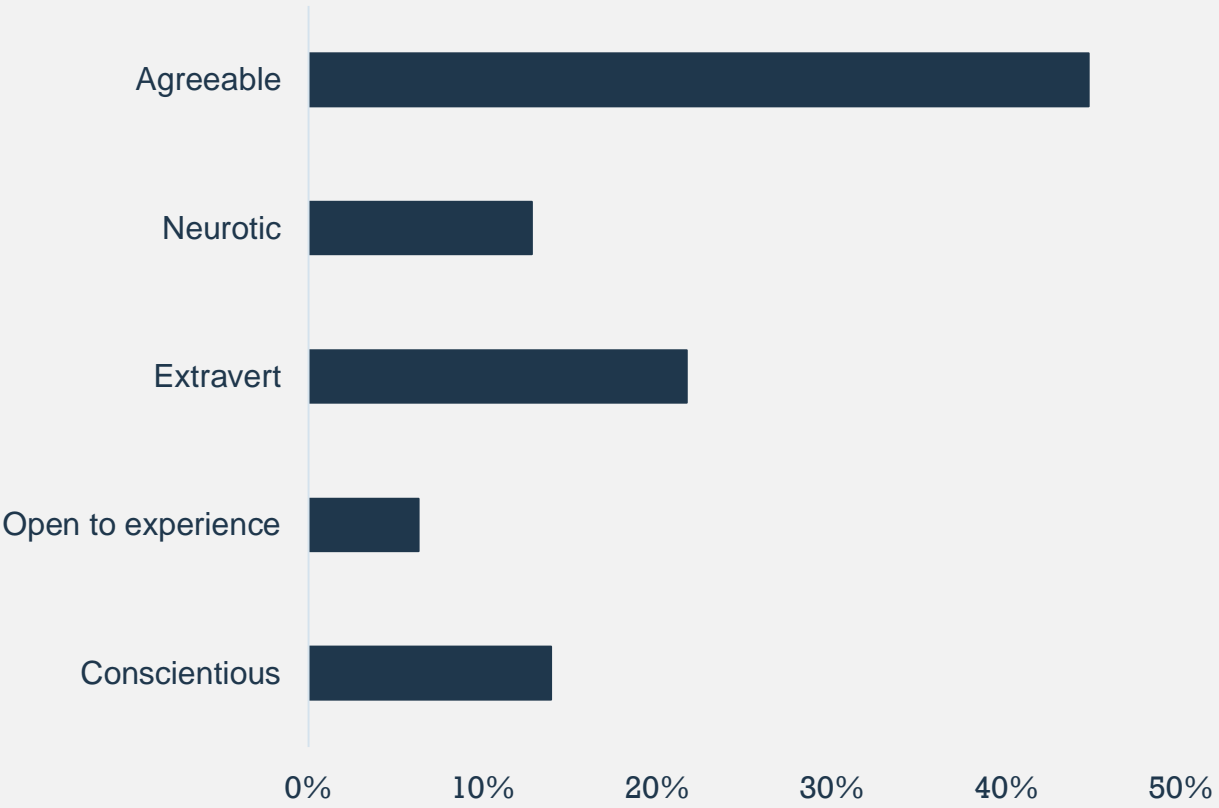
Open to experience (Montréal)



Conscientious (Vancouver)

Personality type of Launceston

19



Dominant personality of Launceston = Agreeable

“ Most people in Launceston value getting along with others. They are generally considerate, kind, generous, trusting and trustworthy, helpful, and willing to compromise their interests with others.

Residents of Launceston also have an optimistic view of human nature. ”

Resident Survey – what the residents say about Launceston

- Launcestonians were the most passionate in describing their place in Destination Think!'s experience
- The survey with the most clear/outspoken choices.
- Black and white scores.
- A lot of free speech in the open question.

Launceston adds immeasurably to Tasmania - far more intact valued heritage plus modern and modern business and residential areas. Wonderful parks and gardens, a vibrant and diverse arts, theatre and cultural scene and a brilliant mix of residents from all over the world.

An important part of Australia's history. Beautiful buildings that some want demolished. Great lifestyle

Launceston balances Hobart's domination of Tasmania. We have a rich history and a potentially vibrant future.

A special city/rural lifestyle in a comfortably-sized city urbanised around the confluence of three rivers, with a rich colonial heritage and beautiful public and private buildings across a range of architectural styles.

I am extremely proud of Launceston's potential, however I feel sad that so many opportunities are wasted or mismanaged.

It would miss the interface between the anonymity of a capital city (Hobart is rapidly losing its identity, which is now replaced with MONA), and the rest of Tasmania. It is the link between the urban and the rural, the inland and the coast, the island and the mainland.

A most interesting city in terms of its historical beauty with modern facilities on a fabulous river. To have the magnificent gorge as a respite from the busier city within short walking distance is an asset that cannot be overestimated.

Nothing. This is an arrogant question.

We are the 'Small Easy.' A very pleasant escape from big cities. Manageable, comfortable, convenient.

Its an awesome city for being able to leave the car at home and walk everywhere.

Frustrating. The Launcestonian outlook is one of self-deprecation and refusal to accept change, at the expense of the younger generation

I feel very proud to live in Launceston. I often wonder how the thousands of Tourists from around the world I see enjoying our beautiful Cataract Gorge know about us. Right now with all the improvements being made around Launceston I feel very excited about our future.

Early in the day, it is just beautiful, listening to the morning chorus of multitudes of native birds as the sun peeps over Ben Lomond. There are so many activities and sites to visit and as the sun sets over the gorge, you can find me sitting listening to the evening chorus as the waters weave their way back through the valley and out to sea.

Disappointing now. I have lived here 65 years . Last 10-12 years have been seeing Launcestons heritage eroded by the councils.

Lucky, proud,happy, great music and art, great festivals - best place ever
It is exciting to live in a city that is working towards being a city of the future (both online and environmentally sustainable)

Depressing. I feel that we seem to just be blundering along. There never seems to be a plan or vision. The arm is doing something to the leg and no-one is pulling it all together.

'Too fast'
'Growing at a rapid rate'
'Only been here 2 years but I love the city upgrades'
'it is starting to be more adventurous'

It is becoming more multicultural which is a good thing as in the past Launceston was very conservative and scared of change. The only thing that worries me is the amount of concrete in the new developments, malls etc and the boring plantings.

'Is it?'
'It's not'
'Not'
'X'
'Too slowly'
'Empty shops'
'Minimal'

It is becoming a more accepting city despite the old conservatives in power the young hipsters are awesome and make this town a safer place emotionally and physically ... thoughtful emotionally intelligent and progressive without wanting to destroy the beautiful nature and history of the city

Ugly glass & steel boxy buildings with no regard to the beauty of the man fine public buildings that were erected in the late 1800's - early 1900's.

Launceston sometimes seems to try too hard to be something it is not, rather than saying "hey, we are Launceston, and we are NOT like every other mid-sized, regional city in Australia". We want to be US - low-rise, historic, friendly, ...

more cosmopolitan
more clean
more picturesque
more people friendly
more festive
more diverse
more contemporary
more open minded
more entrepreneurial

I do hope Launceston doesn't change too much that loses the 'old world' charm that has existed for so long and been an attraction. The addition of more cafes, modern retail outlets is always welcome.

Resident Survey - Pride*

28

Result	Percentage
Extremely proud	24%
Very proud	29%
Proud	34%
Not at all proud	11%
Ashamed	2%

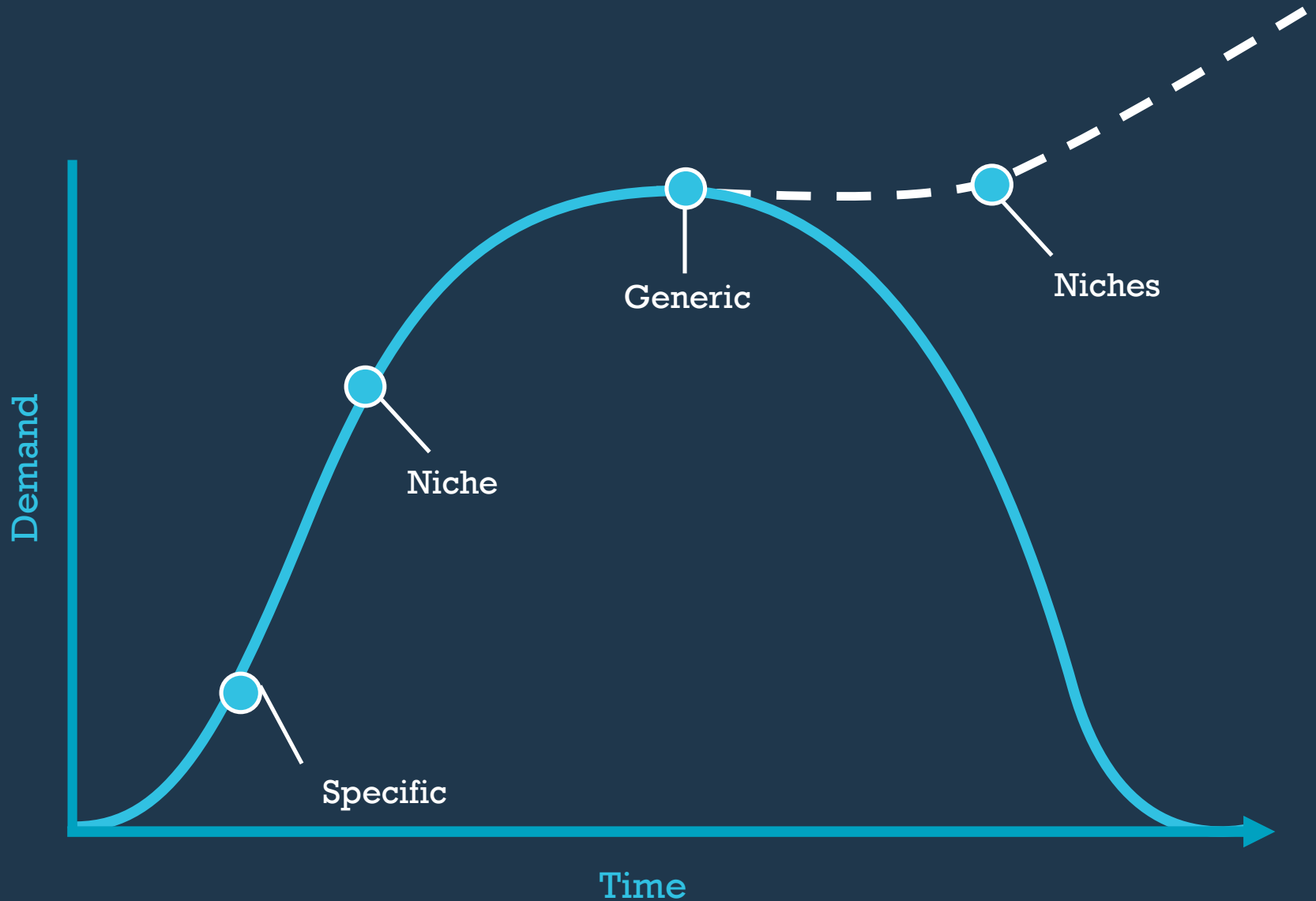
*There is no significant difference between newcomers and people who have lived in Launceston for more than 10 years.

Stakeholder workshop results

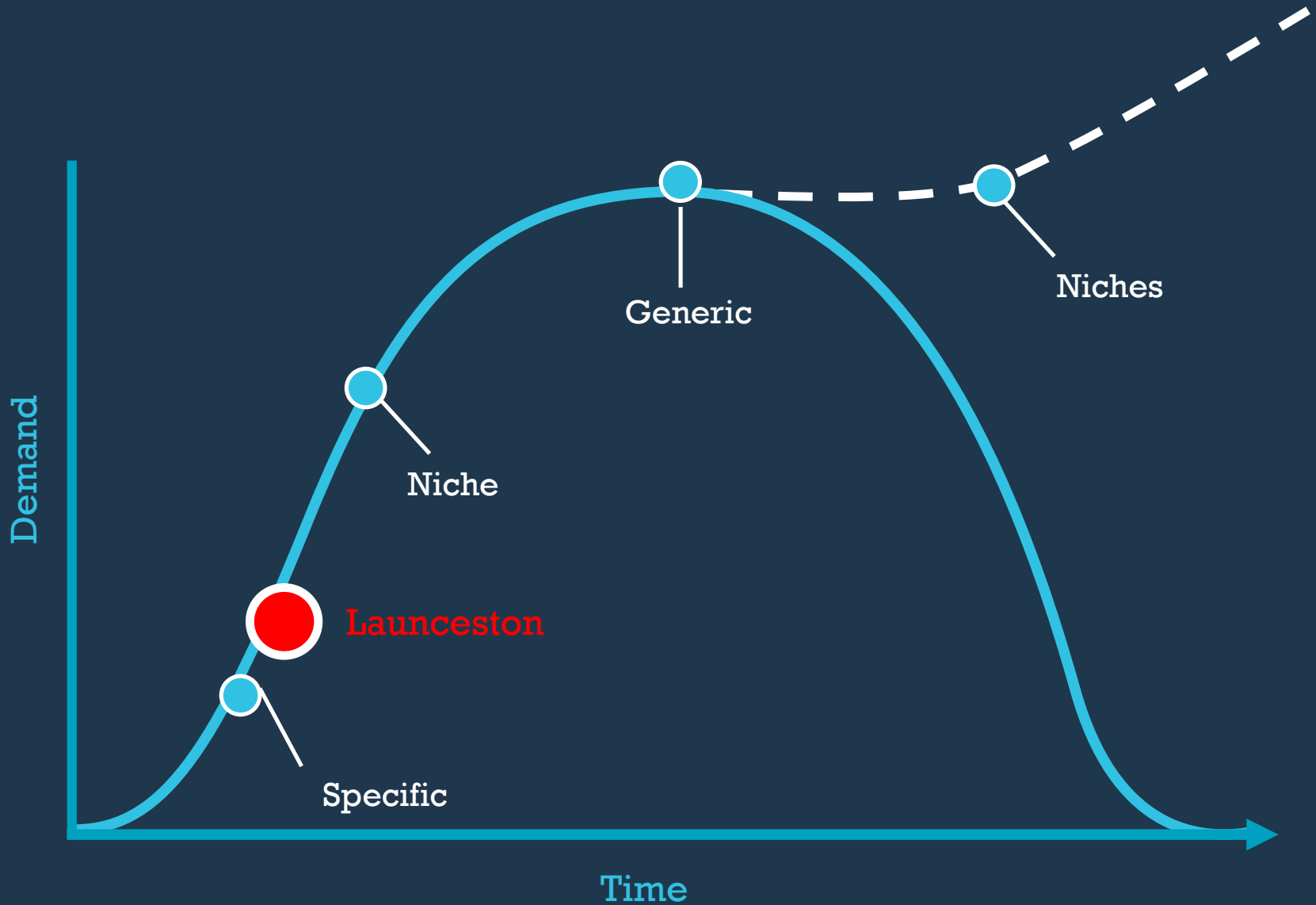
Key stakeholders were asked to attend one of the two workshops during the week of October 8 and two workshops during the week of May 7. These were held in Launceston and a total of 50+ stakeholders and residents participated.

Participants were divided into random groups to work on topics such as elevator pitch, brand personality, product experiences and positioning.

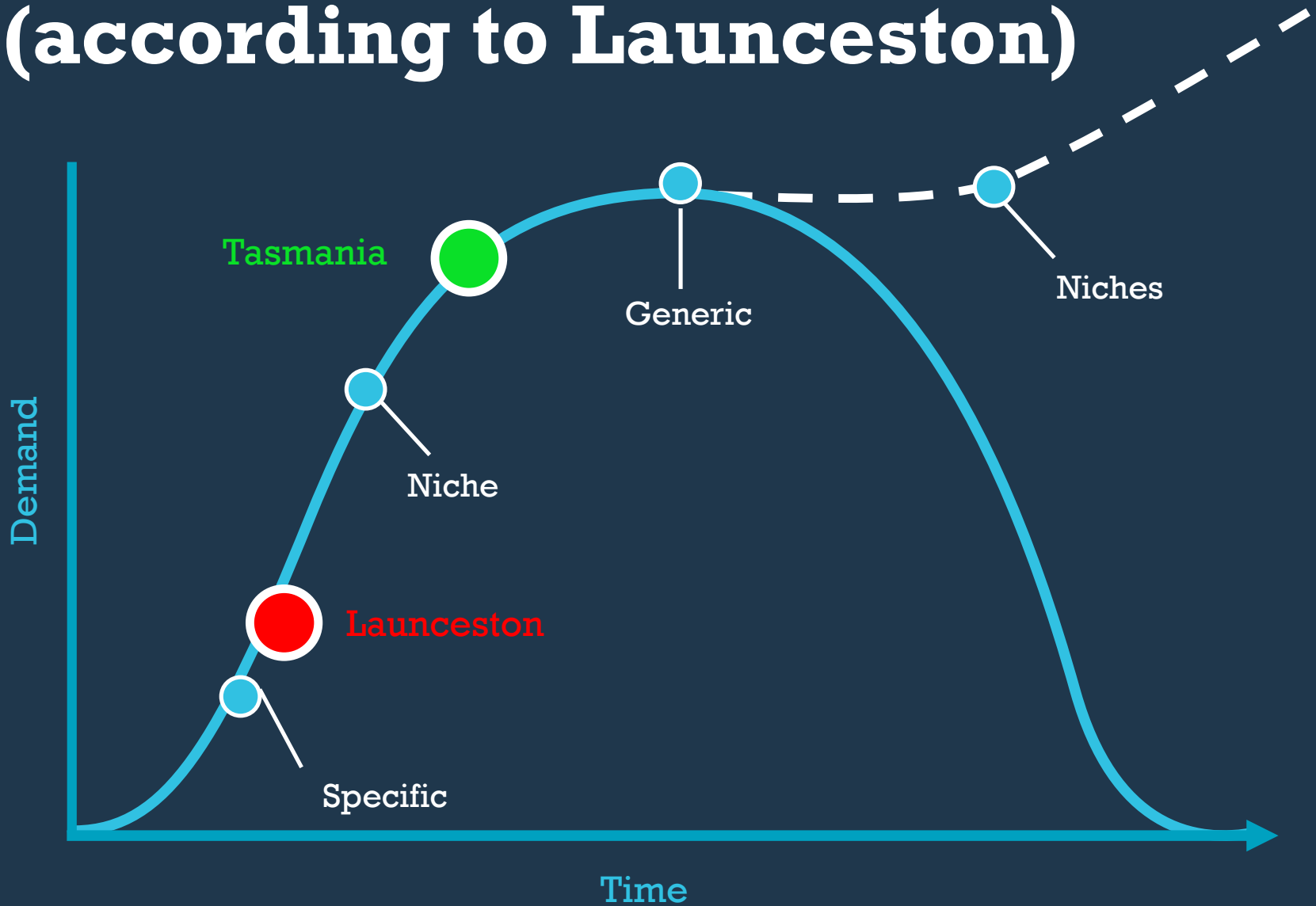
A theoretical Place lifecycle



Launceston Place Lifecycle



Tasmania Place Lifecycle (according to Launceston)



DNA – Summary

Who is Launceston? (stakeholder workshop comments)

*“We are practical, **reliable** and want to enjoy life”*

*“We are like “Judy Dench”, “Cate Blanchett”, “Helen Mirren”, “Nigella Lawson” – sophisticated, classy, strong, intelligent, mindful, full sense of humour and... **a woman***.*

“We are like the spotted quoll – a bit naughty, a bit on our own, resourceful”

*“a spotted quoll: not showy but beautiful, **feisty** !”*

** **First destination ever that identifies itself overwhelmingly as a woman***

What shapes Launceston?

Heritage

“We are one of the oldest towns in Australia”

“Victorian, Georgian – we live in style”

“Heritage Heart”

Demographics

Aging population

Newcomers and diversifying

How does Launceston look?

Beautiful small city: architecture, heritage well preserved, ...

“Launceston's history is enough to keep you occupied for a few days. It is the third oldest city in Australia, after Sydney and Hobart, and has preserved much more of its **heritage** – especially its **architecture**.”

Beautiful nature: Gorge, rivers, parks, flowers,....

“Launceston is white because of the **blossom** on the trees and the boats in the harbour’

“To get even closer to **nature**, drive north of the city for about 10 minutes to the Tamar Island Wetlands Conservation Area. Keep a lookout for eastern banjo frogs, Tasmanian tree skinks and, if you're lucky, an echidna snuffling around on the boardwalk.”

How does Launceston feel?

RELAXING

“our businesses are family run, boutique, local produce, embedded in community”

“The ethos in Launceston is to try to surround yourself with nature even in the city centre – which is why it's the perfect spot for a restaurant celebrating Tasmania's countless gourmet delicacies.”

“the city is like a pinot noir, a bit conservative but with an element of refinement and sophistication”

“It has a city address with a country heartbeat”

“A real treat is a leisurely stroll up the Cataract Gorge in the cool of the evening when the water is as clear as glass. This is the same water that goes into Boag's beer, so it's no wonder it tastes so good.”

How is Launceston changing?

•CULTURALLY

“**New people** bring new ideas” vs “we’re Tasmanians and we don’t need Melburnian megalomania”

•SOCIALLY

“We are like a bottle of gin. It’s about the **essence** but also very boutique and entrepreneurial. And delicious.”

“We invite people from all over the world to add colour to the local **community** that we are building here”

“The **gentrification** has also seen an influx of restaurants and cafes, which has made it Launceston's hip place to be.”

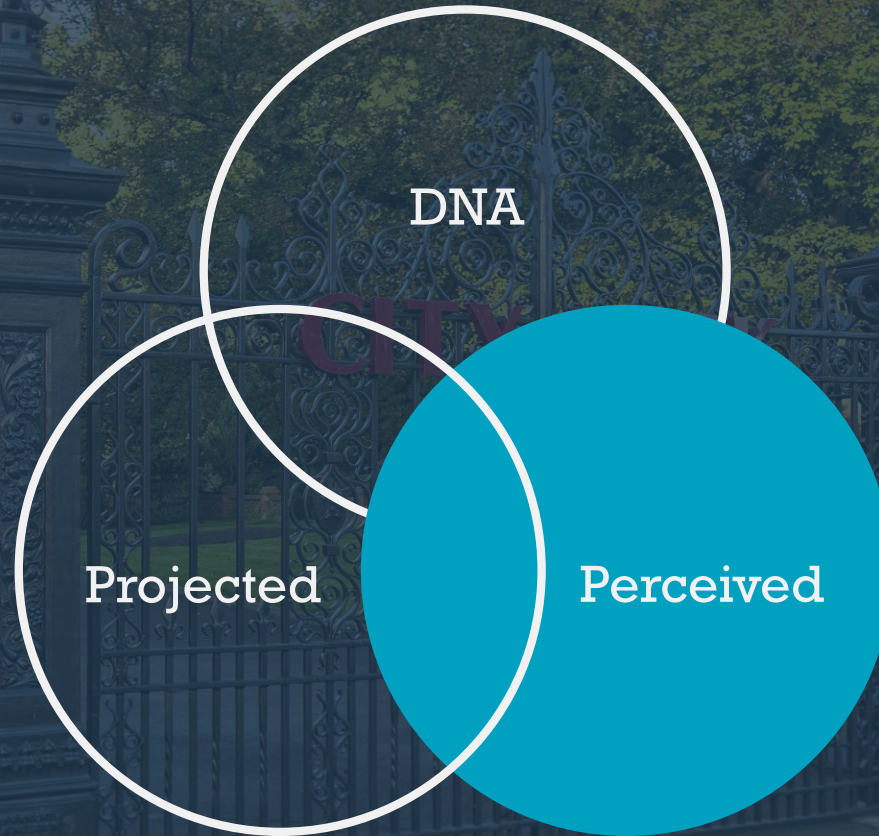
•ECONOMICALLY

“**New businesses** are finding new ways, yet people are rooted in values.”

Launceston's Place DNA

Environment	Infrastructure	Society
Rivers Parks Tamar River Cataract Gorge Flowers Mountains	Heritage Wineries Architecture Restaurants	Relaxed Classic Conservative Slow-paced Developing

3. Perceived



Sentiment Analysis

40

The focus of this research is delivering insights into the perceptions and drivers of Launceston's reputation; through the eyes of those who do not live in Launceston.

What does the world tell us about Launceston?

The power of Word-of-Mouth: Your brand is what other's say it is when you aren't in the room.

(Jeff Bezos)

Methodology



[View More on Instagram](#)



11 likes

pramit_j The oldest hostel I ever stayed so far. Built in 18th century, this speaks a lot of history
[#batmanhawkerinn](#) [#tasmania](#) [#launceston](#) [#australia](#) [#hostel](#)

10 MONTHS AGO



Rationale

This was to be the most rigorous component of the data analysis. It was important to consider Launceston (and how it relates) in the wider context of its relationship with Hobart and Tasmania. This was particularly useful as online conversation about Launceston alone were low.

The Numbers

This analysis was completed using a custom, text-based algorithm focused on conversations around Launceston, Hobart and Tasmania. For each destination we analysed the following number of online conversations:

Launceston: 120,247

Hobart: 670,148

Tasmania: 2,123,483

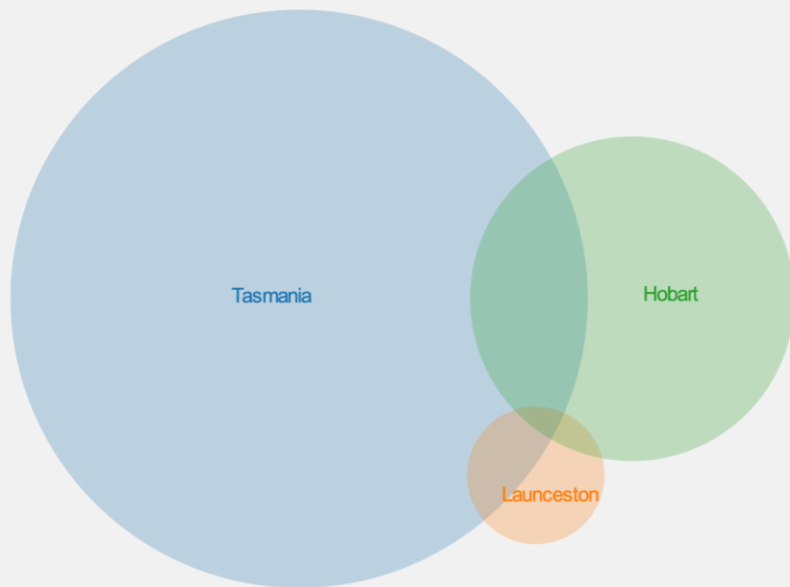
Total conversations analysed for this report: 2,913,878

Sources

More than 500,000 different sources were included in the analysis, including online media sites, forums, reviews and social media networks (Twitter, Facebook, Instagram, Tumblr, YouTube and TripAdvisor).



Size and Scale



In general, we see that the Tasmania overall conversation is approximately 17x larger than that of Launceston and 3x that of Hobart.

Approximately 37% of all Launceston based conversations mention Tasmania, compared to the 27% of Hobart conversations mentioned on conjunction with Tasmania.

We can see from these numbers, that the Tasmania overall brand will have an impact on how visitors perceive Launceston.

We see an intersection where all three destinations are mentioned in conjunction with one another. This accounts for approximately 7,000 conversations a year.

Calculations + Metrics = Perception

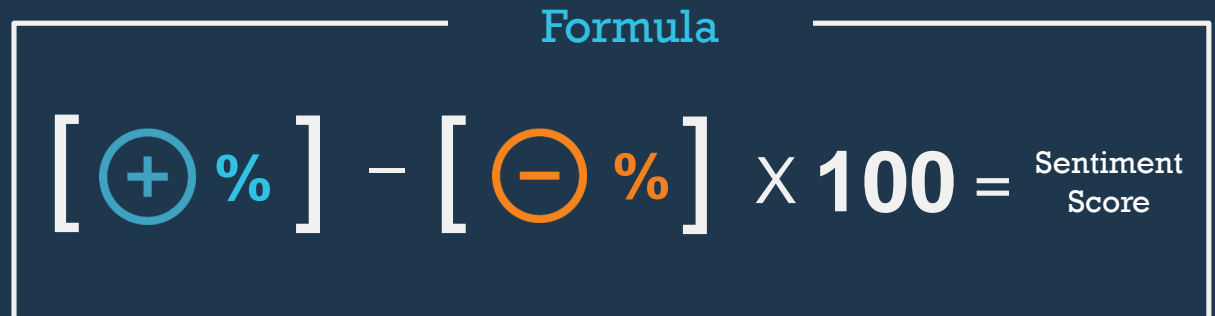
Gathering sentiments

The Sentiment score allows us to understand in a single snapshot the overall attitude of conversations around your destination through the eyes of its visitors, and provide a performance benchmark to track over time. Throughout the report, attitudes will be marked as promoter, passive or detractor.



Applying the formula

Once scanning, monitoring and analysis of all online conversations happening around the world related to your destination are complete, we apply the Sentiment Score formula.



Calculations + Metrics



Destination promoter

Those actively recommending or speaking positively about your destination to others

RT @emlybkr My favourite place on the planet has been profiled by THE GUARDIAN!! Go to Launceston and go to this pub <https://t.co/dnKuS8aWXh>



Destination passive

Those speaking about your destination from an indifferent point of view

dbatty1 - Interesting... Looking for a toilet? This one's fresh #launceston #tasmania #signs

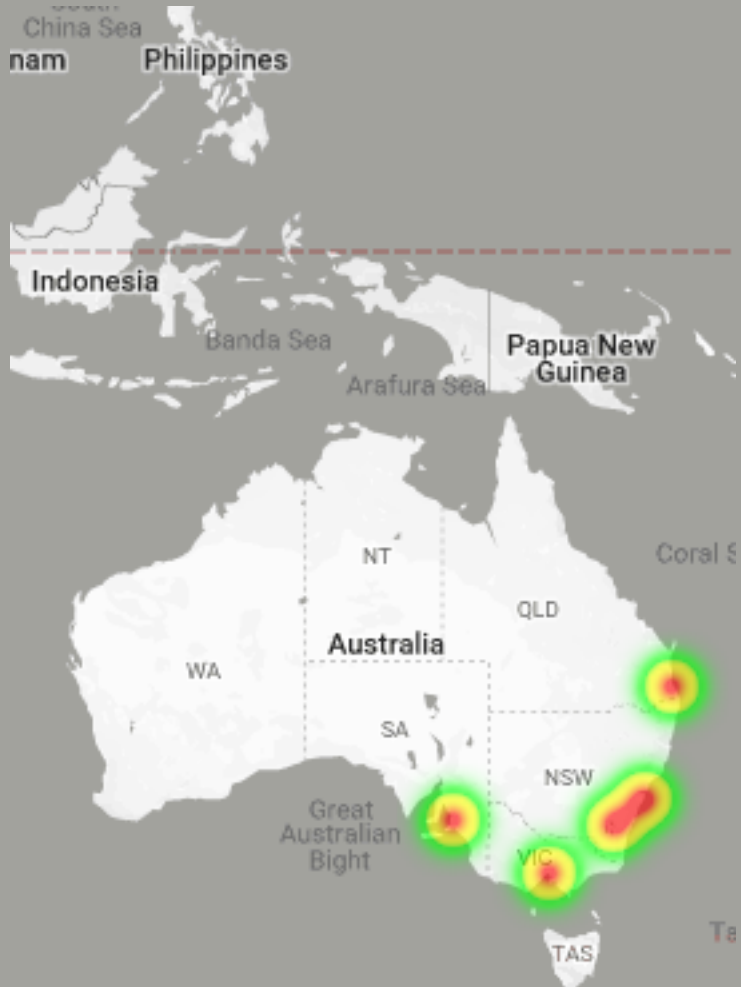


Destination detractor

Those actively discouraging or speaking negatively about your destination to others

[...] I had to carry her luggage myself. No lift in the room. Also, the room were smaller than a normal.room so is the lobby. Other than that, very nice experience. **Launceston** overall is disappointing in terms of the activities and food choices ! We couldn't find open cafes at 4 pm !!! 🙄 The hotel is a vintage old but in [...]

Geographic Distribution



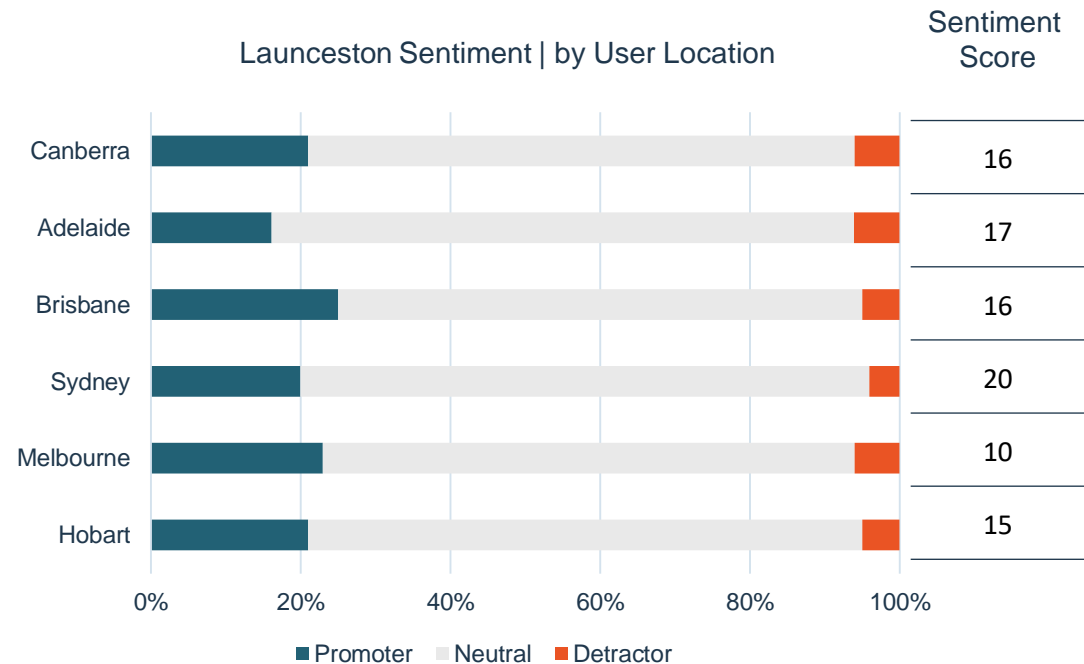
To better understand **who** is driving online conversations around Launceston and **where** they are having the conversations, we analysed the user data from 25,809 unique online users across the world. Geographically they are distributed as follows:

Hobart	16.27%
Melbourne	16.23%
Sydney	12.6%
Brisbane	2.5%
Adelaide	2.5%
Canberra	1.8%

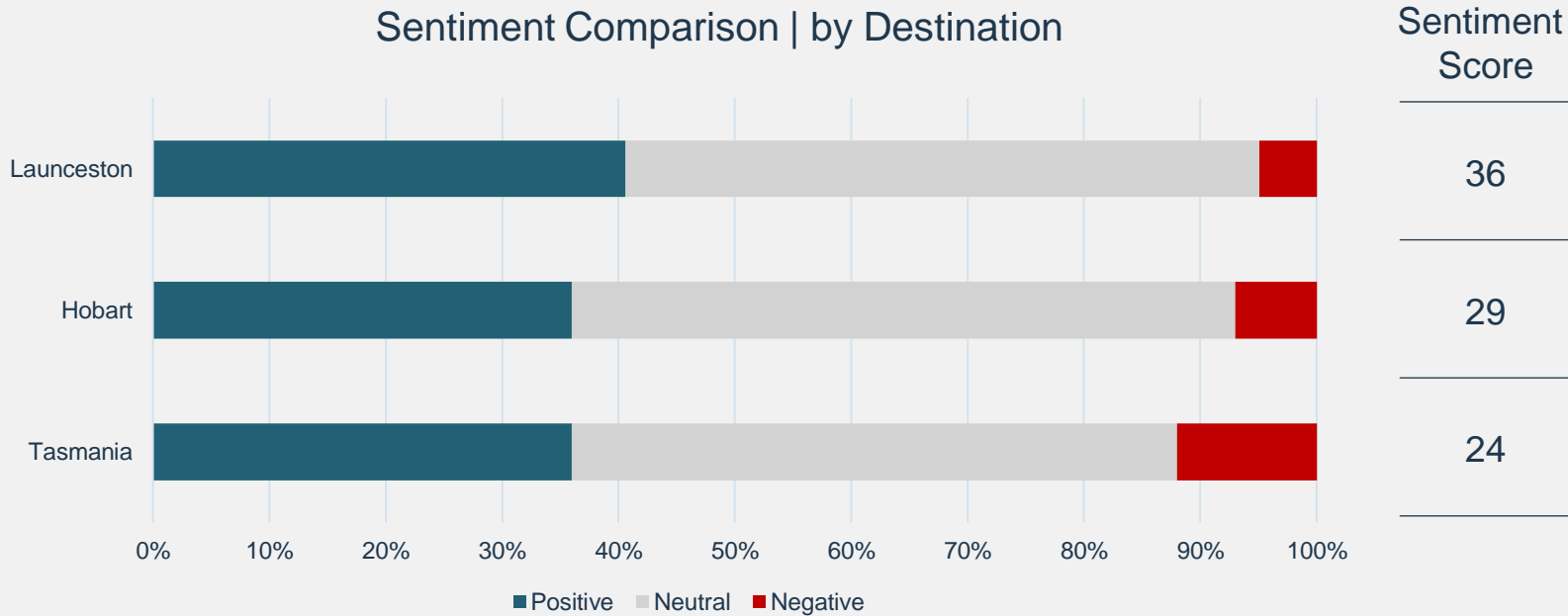
Geographic Sentiment



Through isolating the IP addresses of the conversations around Launceston, we are able to calculate the variance in sentiment by user location.



Sentiment Comparison



A “good” sentiment score:

- Scores in the 10s – concerning
- Scores in the 20s – fine
- Scores in the 30s – good (eg. Launceston, Auckland)
- Scores in the 40s – great (eg. Sydney, Melbourne)

Geographic Distribution



Melbourne

As Melbourne is an important market for Launceston, to better understand what is driving the negative sentiment, we took a closer look specifically at conversations that originated from IP addresses from that location.

The top three conversation drivers of negative sentiment stemming from Melbourne can be distilled down to:

1. Flight delays and/or airline availability
2. Road conditions, roadworks and driver behaviour
3. The Tassie Hawks

Seriously [#Tasmania](#) drivers. I've just done the Hobart-Launceston drive. What the fuck is with driving at 80kmh in a 110kmh zone? Had to pass three people doing that plus plenty more creeping along at 90-100kmh. Bright sunny dry day as well.

So annoying.

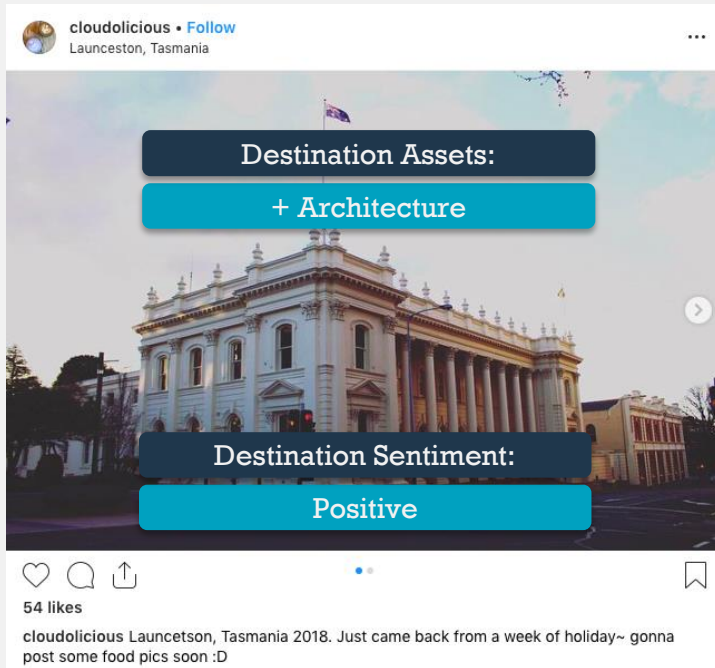
8:00 PM - Feb 6, 2018

Negative Sentiment considered

1. Flight delays and/or airline availability
 - High volume of flight cancellations and delays
 - Lack of scheduled flight services and variety of route
2. Road conditions, roadworks and driver behaviour
 - Road network not at the same standard as mainland Australia (narrow, single lane)
 - Volume of tourists (unfamiliar drivers) on the road
 - Regional driver behaviour different to large cities
3. The Tassie Hawks
 - Possibly Melbourne based disappointment with Hawthorn home games in Tasmania (tied to flight availability)

Destination Assets

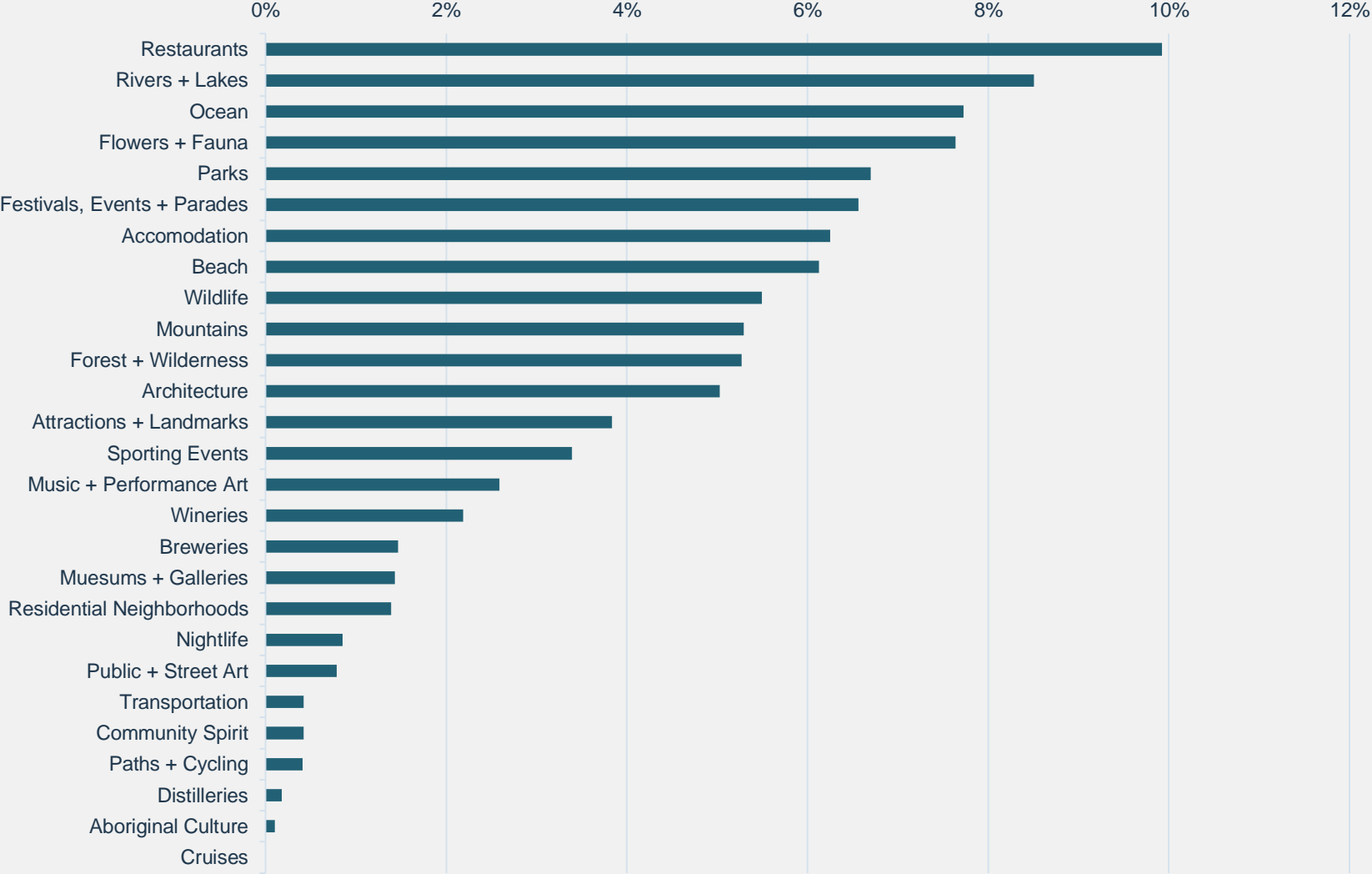
(core assets driving Launceston, Hobart and Tasmania's online brand reputations)



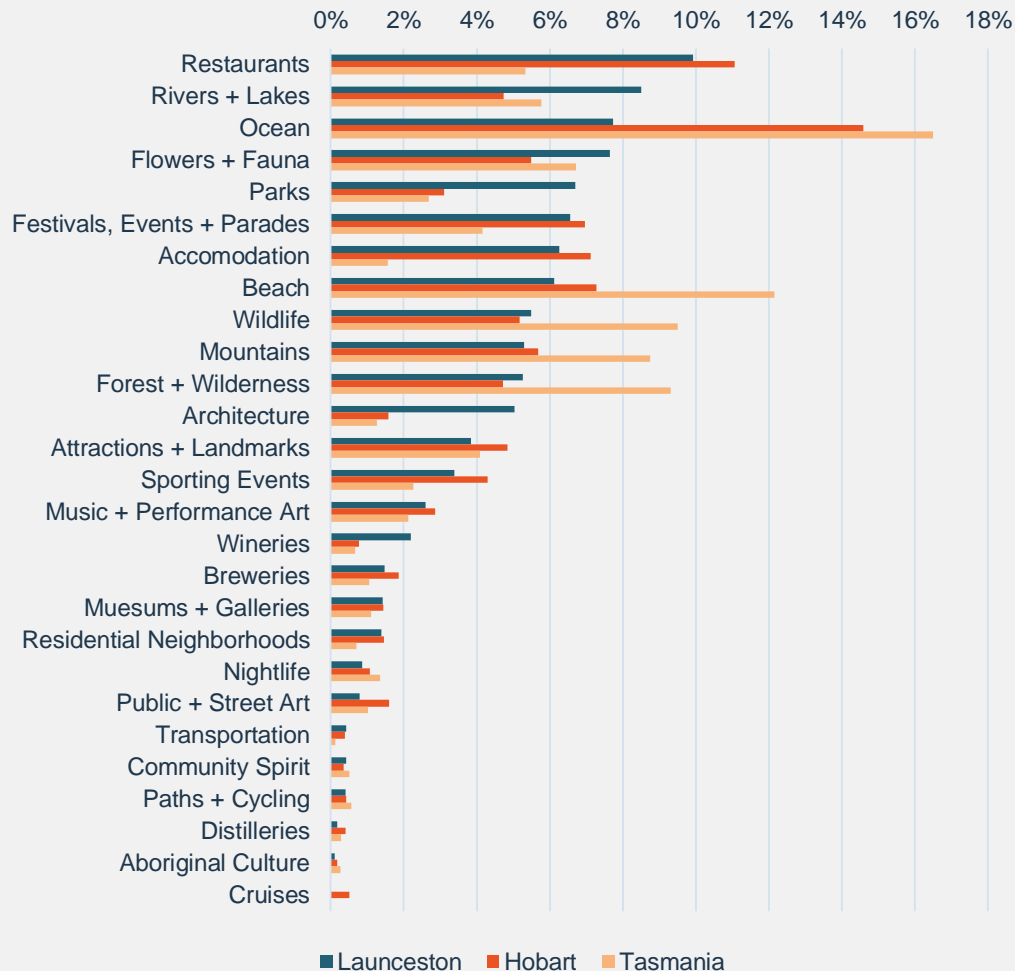
In this section, we focus on discovering which aspects of Launceston visitors feel are **share-worthy**. These share-worthy moments within the destination give us insight to what people see as unique, special or distinct to the place they are in.

Using a custom key-word/image analysis framework, we pulled the most shared assets within Launceston that are driving the **online brand reputation**.

How respondents value our Destination Assets?



Asset Comparison: Competitive Average



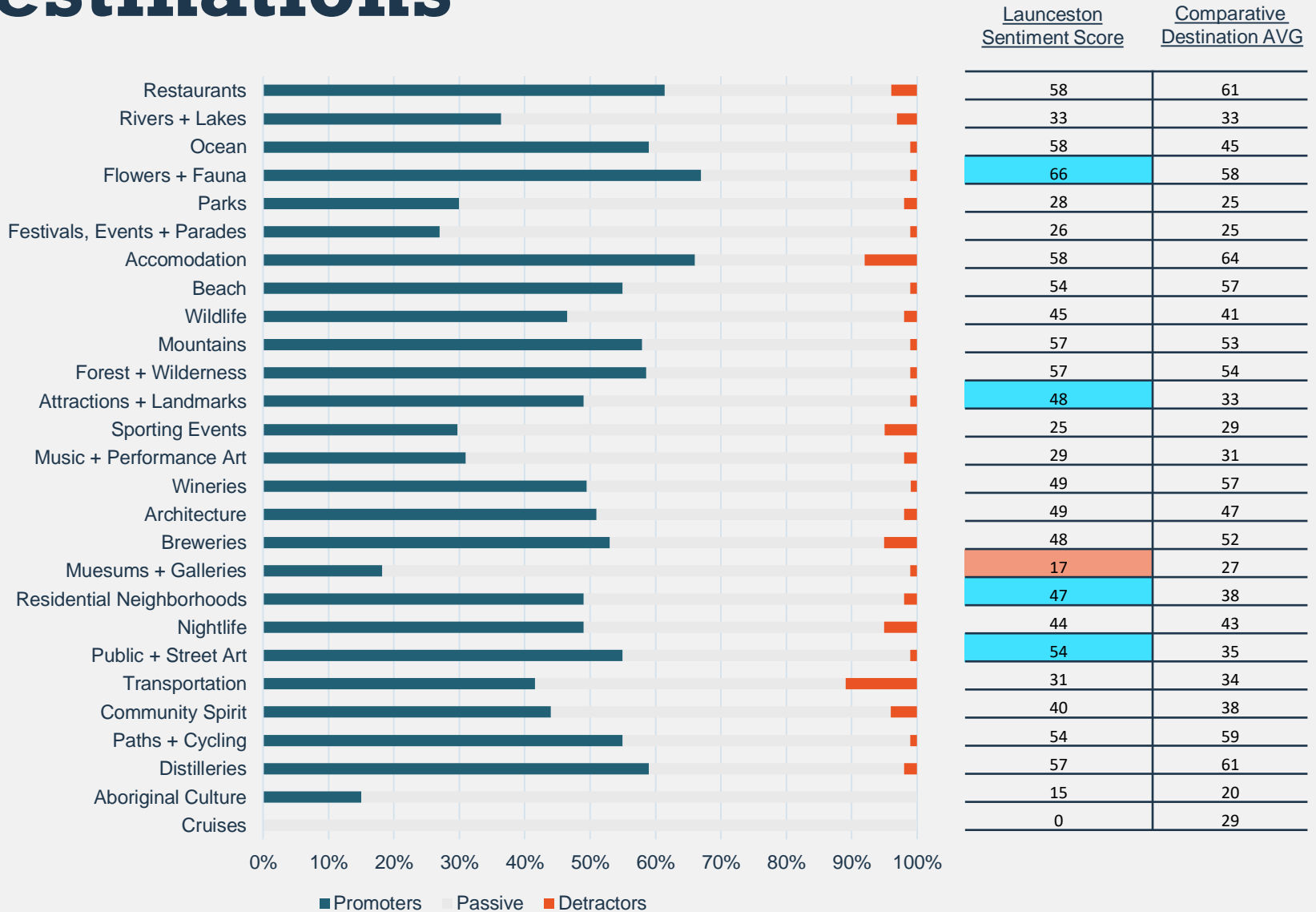
To gain context of the performance of Launceston's brand assets that are relative to Hobart, we compared and contrasted the share of conversations of both destinations.

From this analysis, we see that both Launceston and Hobart have a strong connection to nature and we can see that Launceston's strengths come from its connection to **Rivers + Lakes**, **Flowers + Fauna**, **Parks** and **Forests**.

As well, from a culinary stand point, we see the Launceston's **Wineries** stand out when compared to Hobart.

Launceston is also generating a higher share of voice stemming from its unique **Architecture**.

Asset Sentiment: Comparative Destinations



Asset Sentiment: Destination

Launceston vs Hobart

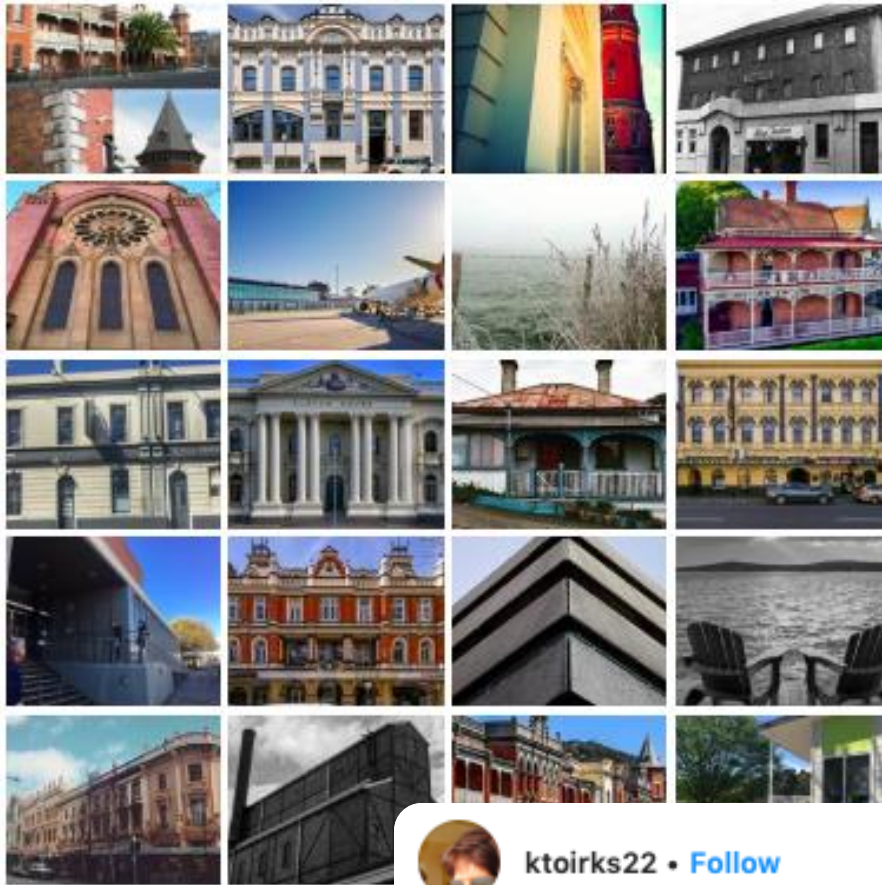
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As well, from a culinary stand point, we see the Launceston's **Wineries** stand out when compared to Hobart.

Launceston is also generating a higher share of voice stemming from its unique **Architecture**.

Architecture: A Closer Look



Accounting for approximately 4% of all imagery associated with Launceston and a positive sentiment score of +49, the classic architecture and design of the buildings are a unique competitive advantage for the destination.



ktoirks22 • [Follow](#)

ktoirks22 There are some wonderful heritage buildings in Launceston Tasmania. Have enjoyed wandering around and looking up!!

Rivers + Lakes: A Closer Look



The North Esk River and the Cataract Gorge are both significant contributors to conversation volume around Launceston, accounting for approximately 5,600 conversations from travellers a year, making it the second largest contributor to destination conversation.

Wineries: A Closer Look



The wineries and vineyards of the Tamar Valley drive a significant volume of conversation and prove to be a strong tourism asset for Launceston and sets them apart.

Strong Asset Sentiment

Tasmania



16%
Ocean



12%
Beach



10%
Wildlife



9%
Wilderness +
Mountains

Hobart



11%
Restaurants



7%
Festivals +
Events



5%
Sporting
Events

Launceston



9%
River



5%
Architecture



2%
Wineries

Tasmanian Destination Comparison:

Launceston

What stands out most in the conversations around Launceston, is where they contrast to Tasmanian conversations overall. Whereas Tasmania is strong in the active adventure driven by the natural landscape of the region (wilderness, mountains), Launceston is strong in the cultural aspects of the destination (Architecture, Wine).

As Tasmania conversation volume is 17x larger than that of Launceston, Launceston could face a challenge in shifting perceptions of Tasmania being solely adventurous nature compared to that of a destination for the cultural explorer.

Launceston: **River** (9%), **Architecture** (3%), **Wineries** (2%)

Hobart: **Restaurants** (11%), **Festivals + Events** (7%), **Sporting Events** (5%)

Tasmania: **Ocean** (16%), **Beach** (12%), **Wildlife** (10%) **Wilderness + Mountains** (9%)

Destination Attributes

(the core descriptors used to describe Launceston)

In this section, we focus not on the conversations people are having about Launceston, but **how they are describing it**. These descriptors provide us insight into how visitors perceive the personality of Launceston.

Using a custom text-based analysis, we pulled the most frequently mentioned adjectives used to describe Launceston.



Attribute Pairings

All destination descriptors were sorted, categorized and assigned across seven distinct attribute pairings. Each attribute set allows us to gain insight into the overall perception of Launceston's brand personality.

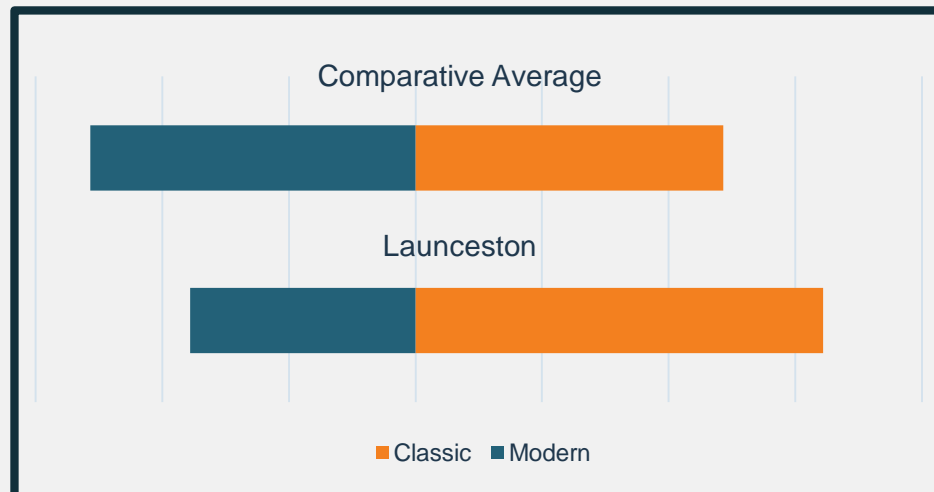
Modern:

Contemporary
State-of-the-Art
Leading Edge
Avant Garde



Classic:

Historic
Victorian
Colonialist-
Design



Destination Attribute Profile

Combining the scores from all seven attribute pairings, we are able to plot Launceston's unique destination attribute profile and determine its relative strengths in comparison to the Comparative Destination Average.

Launceston | DNA Personality



Launceston: Classic



jennigreenephotography More classic
#Launceston architecture.

67% of the content driving Launceston's attribute of Classic is being driven by Architecture and Building based imagery.

The visual ecstatic of the classic architecture in Launceston has an overall impact on the type of descriptors used in describing the city overall.

In view of this, Launceston is described as classic.

Launceston: Relaxed



110 likes

joanm56 Today it's foggy and raining , but yesterday the air was crisp , the mist was lifting off the river , and the sun was shining . The reflections were so still and beautiful and it was good to be alive .

#launcestantasmania
#discovertasmania #cityoflaunceston
#tamarriver #wintersun

The natural landscapes surrounding Launceston are core contributors to its attribute of Relaxed. This is comprised mainly of imagery featuring:

15% River

14% Beach

10% Trees and Forest

Launceston: Friendly

The service industry is the core of Launceston's attribute of Friendly. When compared to Hobart and Tasmania's Friendliness scores, Launceston scores +5% above.

This is a strong indicator that travellers to Launceston have a positive experiences when encountering service-staff on their trip.

Launceston: Attributes

Core Attributes from Online Sentiment:

Classic (stemming from architecture)

From first glance, the history of the city is evident. The architecture of Launceston is a bright contrast to the modern cities of Australia. This gives a distinct look and feel to the personality of Launceston.

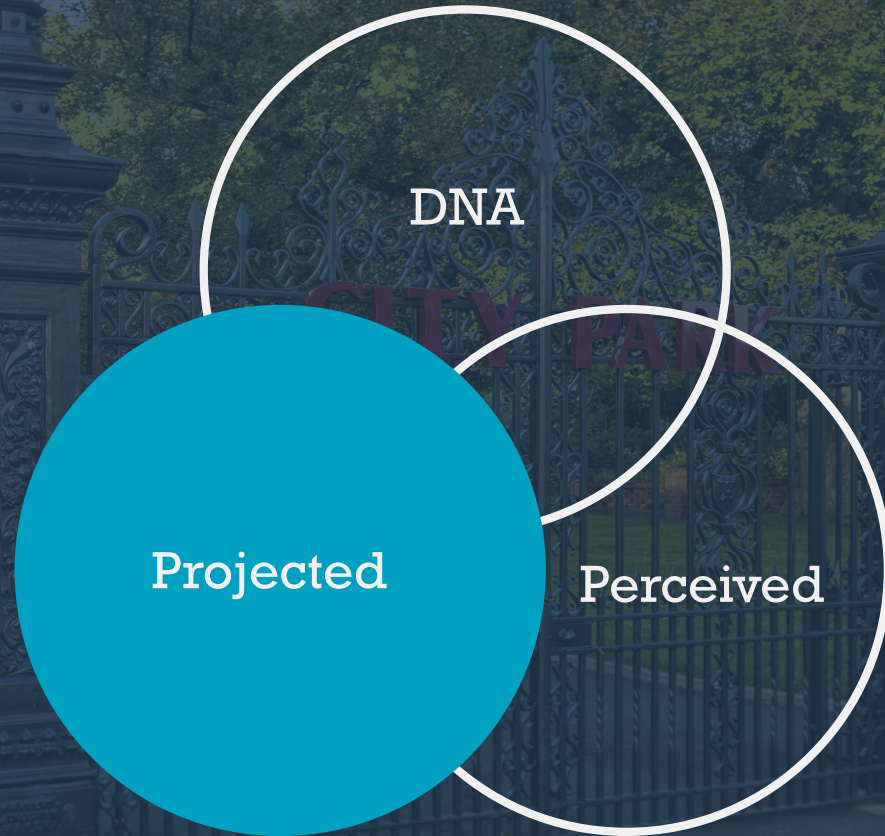
Relaxed (stemming from natural environment)

In contrast to the active-adventurous nature of Tasmania, Launceston comes across as very relaxed and calm.

Friendly (people and service industry)

Tasmania as a whole scores quite high in friendliness. However, we see that Launceston skews slightly above both Tasmania and Hobart. This stems from the service provided by the frontline staff and service industry.

4. Projected



Launceston is...

- Friendly
- Wine-region
- Abundance
- Laid-back
- Welcoming
- Down-to-earth
- One of Australia's oldest cities
- Heritage
- Natural beauty
- Recreation
- The heart of Tasmania
- Community focused
- Boutiques
- Architecture
- Basecamp/springboard for adventure
- Pastoral
- Accessible
- Scenic
- Relaxing
- Pure/natural
- Walking and biking trails
- Family oriented

Projection Summary

- Launceston is a 'place of plenty' but **no distinct** image at all. You want to be everything for everyone, everywhere.
- No prioritization of experiences. **Architecture, nature & parks** and **wineries** do not stand out.
- **Information overload** but no stories.

Low volume + no choices = low awareness

5. Observations & Challenges

Tasmania

- Promotion tries to cover all experiences but imagery attracts the *outdoor adventurer* – people that actively want to be stunned by nature, look for rare animals, love their sports etc.

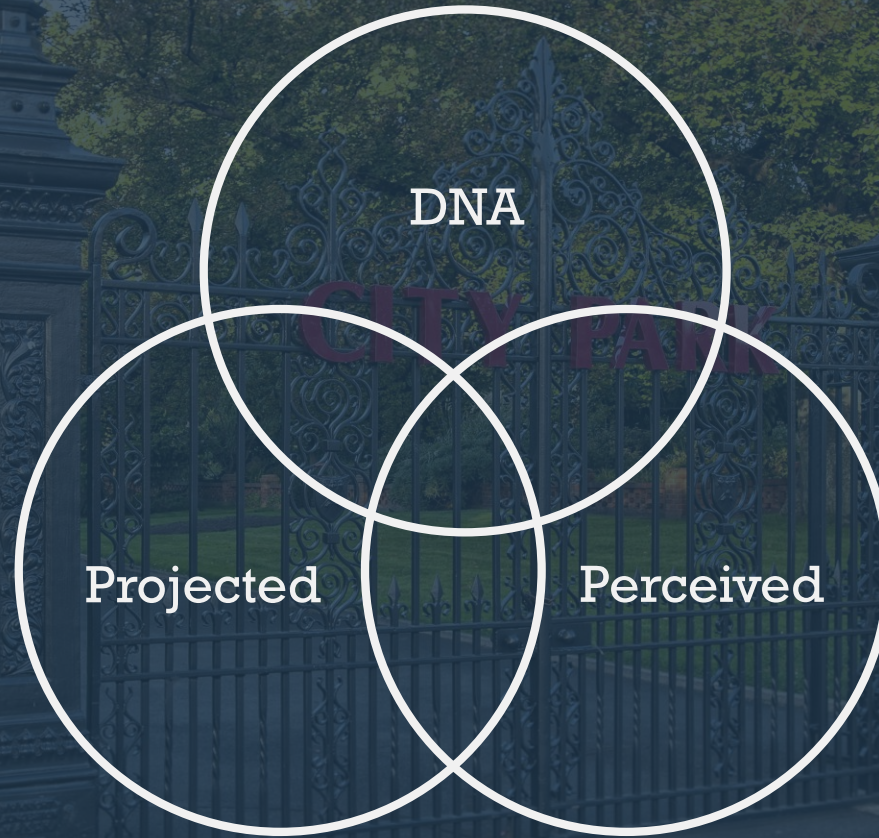
Launceston

DNA indicates that Launceston could benefit from being known to *cultural explorers* – people that love to discover architecture, heritage, history and will enjoy the story behind the good life that people experience while enjoying a glass of wine.

THE PARADOX :

Launceston can't be promoted as a stand alone (we have a unique product that sets us aside from Tasmania) because of the extremely low volume of conversations and low 'Launceston' awareness.

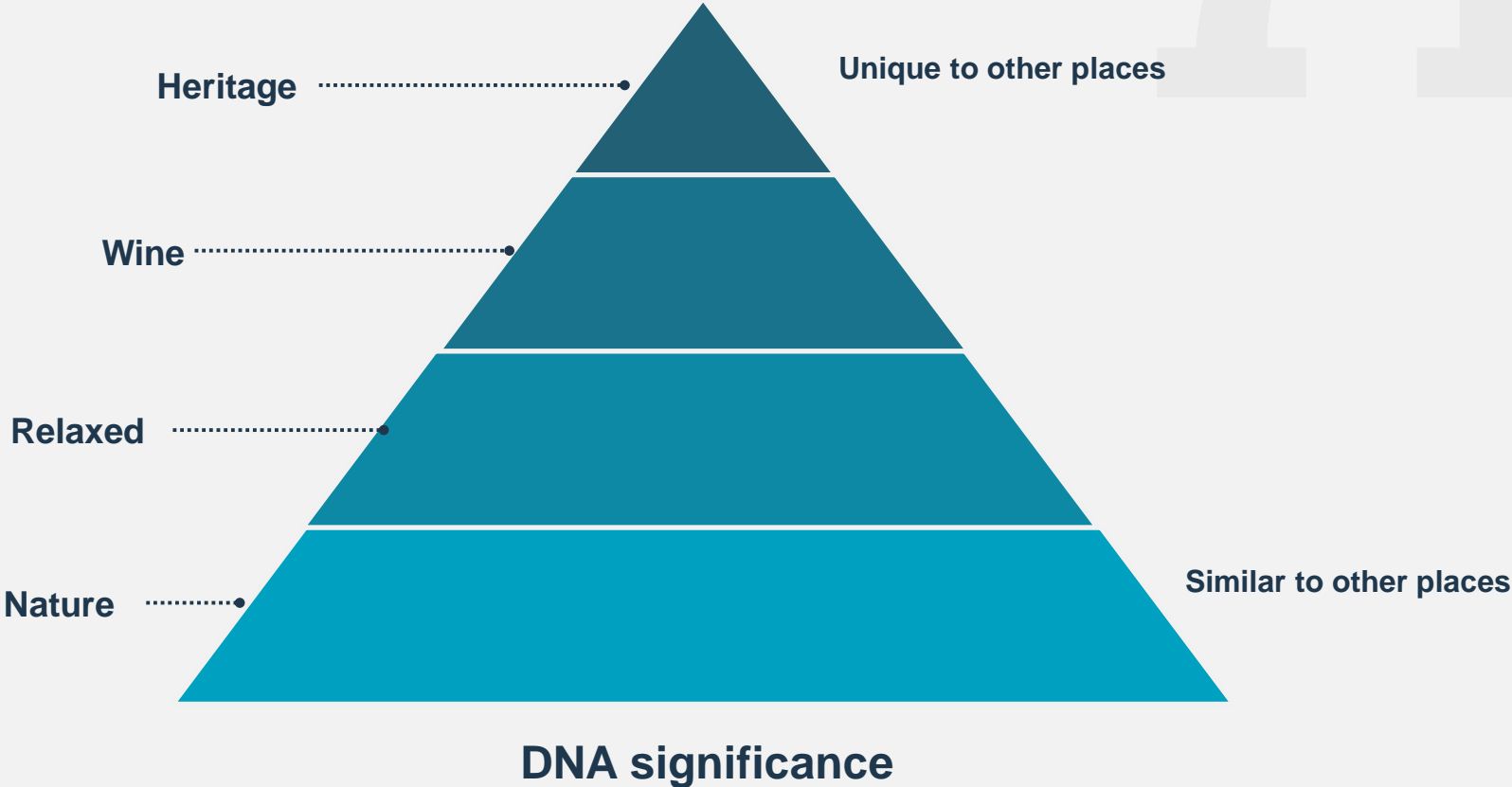
6. Conclusion



DNA Attributes

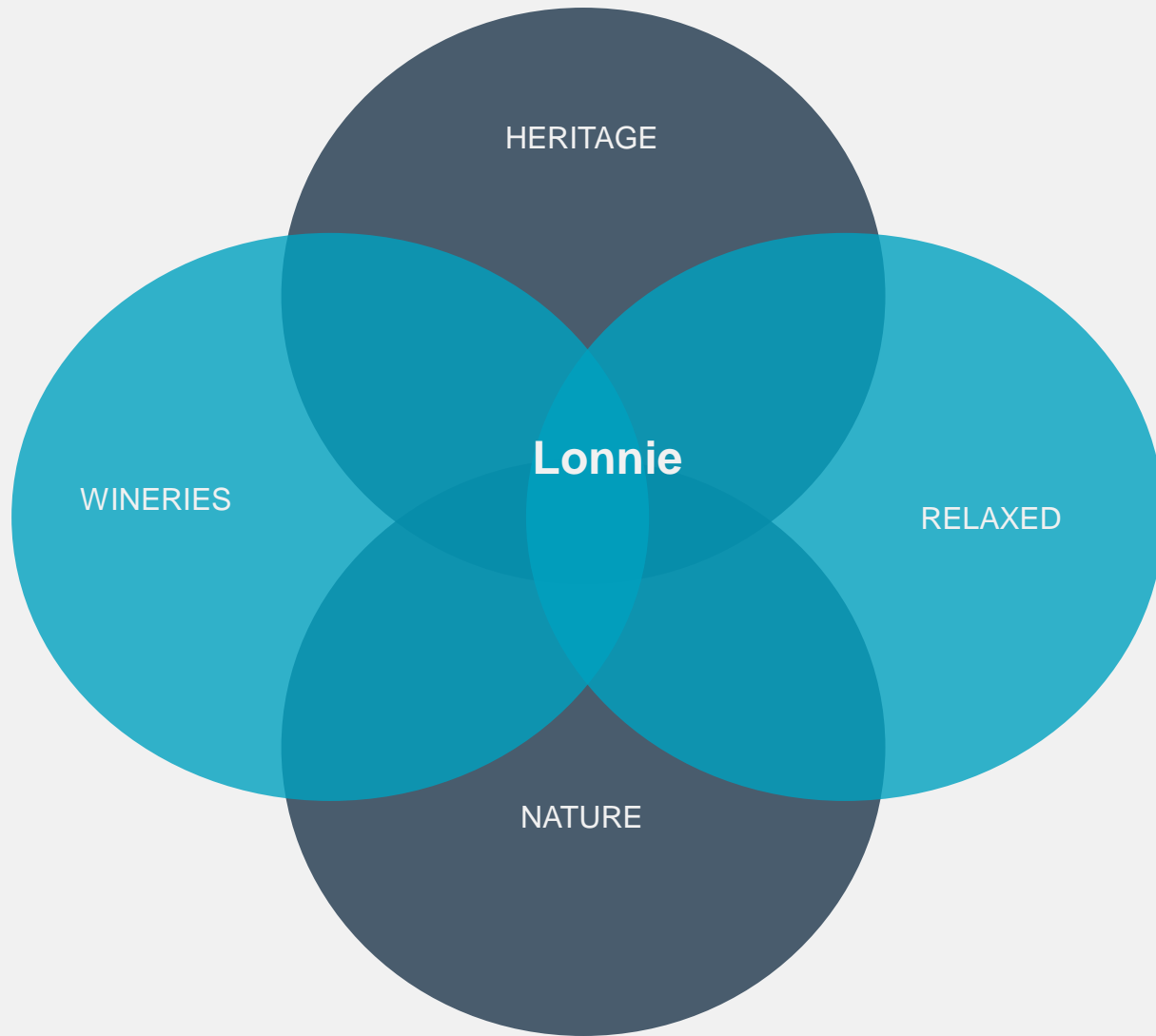


DNA - Hierarchy



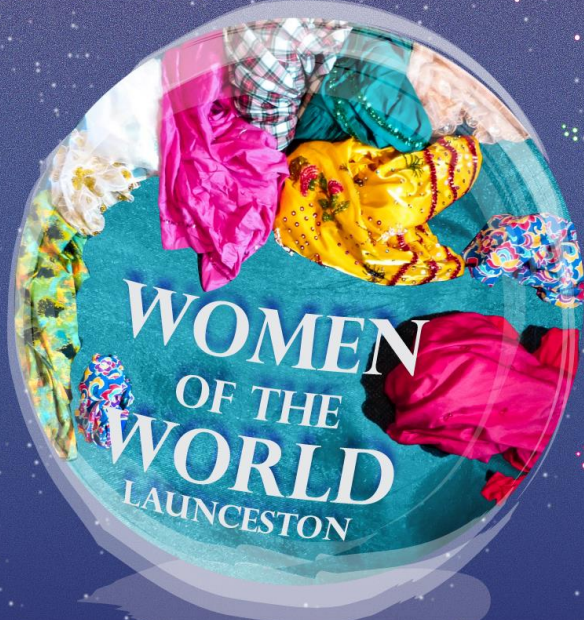
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What makes Launceston, Launceston?



Lonnie is a woman...

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WOMEN OF THE WORLD
LAUNCESTON

A women-only event, celebrating culture with dance, stories and nibbles

\$5 ENTRY

SATURDAY 11 AUGUST | 6:30- 8:30PM

CITY BAPTIST CHURCH, 11 FREDRICK STREET, LAUNCESTON



DESTINATION Think!

moreover a dame....

74



DESTINATION **Think!**

...a classy lady

75



DESTINATION Think!



**she stays
authentic..**



...is a bit vintage



DESTINATION **Think!**

redefines classic



fermenting the future.

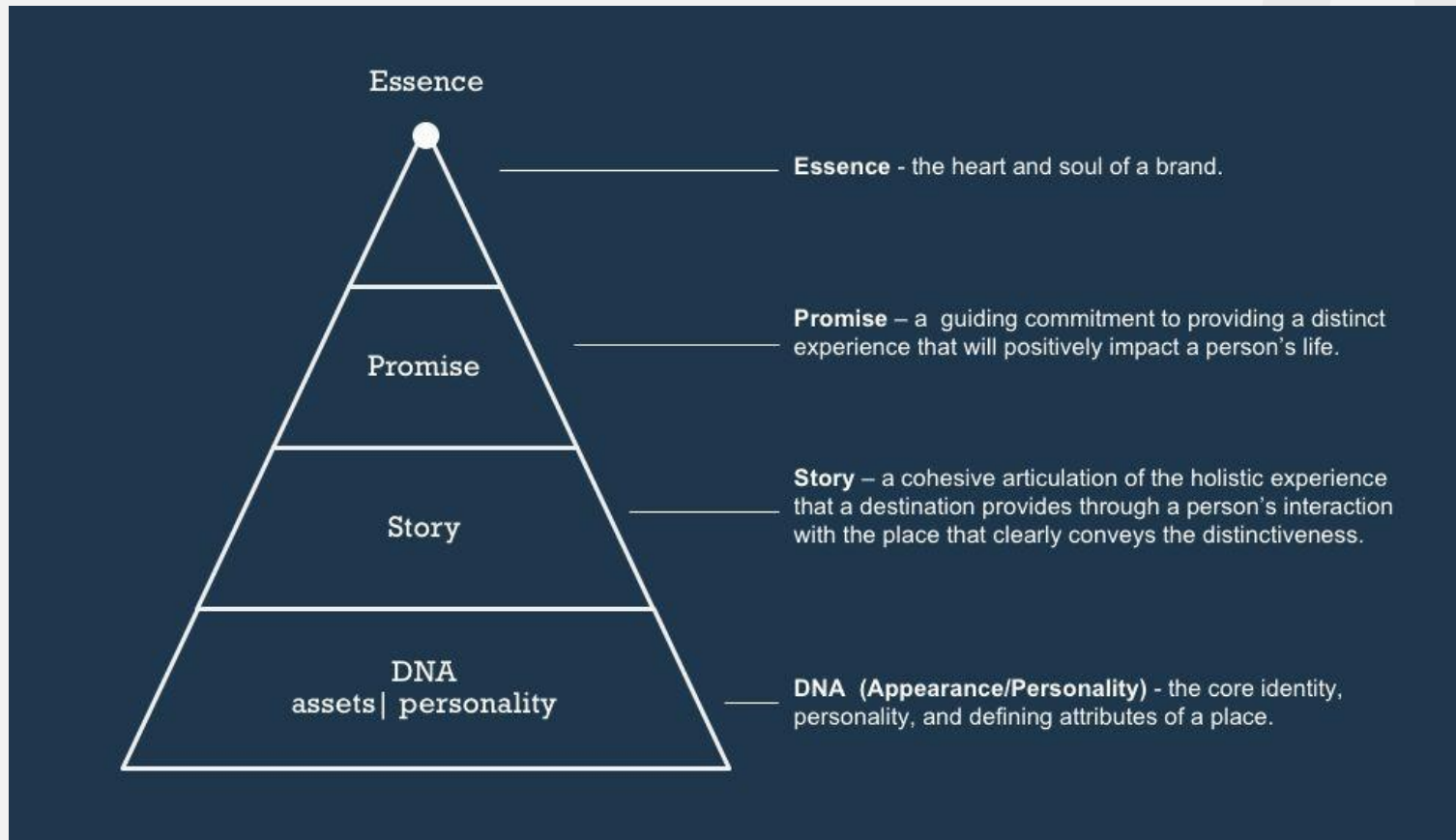


Where to from here?

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- It is necessary to develop the Launceston experience
- And tell the Launceston story
- But you can NEVER do this in the right way by ignoring or destroying your own DNA

Develop a brand framework



How?

- **Themes**
 - What can we feel and see; authenticity
 - Are they themes we can move forward with - gap analysis
 - Develop a creative brand, considerate of regional and state branding that will provide the foundation for all destination marketing into the future
 - How do we communicate; collective story and mindset
- **Implementation**
 - Ownership and ongoing advocacy by stakeholders
 - City of Launceston engage and educate community
 - Tourism industry partners; destination marketing, promotion of the brand outwardly



Looking forward to continued
collaboration