STRATEGIC MASTER PLAN FOR THE GREAT OCEAN ROAD REGION VISITOR ECONOMY 2015-2025
This Strategic Master Plan is a collaborative piece of work coauthored by:

- Bill Fox – Bill Fox & Associates Pty Ltd
- Rachel Donovan – Insight Communications
- Karl Flowers – Decisive Consulting Pty Ltd
- Wayne Kayler-Thomson – Wayne Kayler-Thomson Pty Ltd
- Liz Price – Great Ocean Road Regional Tourism Ltd (GORRT).

The Great Ocean Road Regional Tourism Board’s Development Sub-Committee has acted as a Project Steering Committee and has guided the Plan’s development.

- Wayne Kayler-Thomson – Chair
- John Maher – GORRT Board Member
- Clive Goldsworthy – GORRT Board Member
- Sam Lucas – GORRT Board Member
- Dean Newell – GORRT Board Member
- Felicia Mariani – Tourism Victoria
- Phil Currie – Regional Development Victoria/RDA Barwon South West
- Kate Millar/Rod Newnham – Parks Victoria
- William Tieppo/Sam Pirotta – Vic Roads
- Robert Schreiber – Partner, Grant Thornton/Lorne resident.

The Great Ocean Road Regional Tourism Board

- Wayne Kayler-Thomson – Chair
- John Maher – GORRT Board Member
- Dean Newell – GORRT Board Member
- Clive Goldsworthy – Surf Coast Shire Council
- Sam Lucas – Warrnambool Bus lines
- Tony White – Colac Otway Shire Council
- Andrew Mason – Corangamite Shire Council
- Fay Valcanis – Little Big Fish
- Sharon Bradshaw – Forrest Brewing
- Bill Millard – Warrnambool City Council
- Dean Robertson – Moyne Shire Council

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First published, September 2015.
It’s 2025 and the Great Ocean Road region is thriving!

Communities have embraced and value a visitor economy that provides jobs for their children, business opportunities that complement their lifestyles, and which attracts newcomers to their communities. This, in turn, has improved infrastructure and amenity in all towns and villages, and has encouraged community resilience in the face of a competitive and ever-changing global world.

An empowered tourism industry with an entrepreneurial spirit is producing authentic experiences that celebrate the region’s rich history, natural assets and village lifestyles. Natural attractions are protected and shared with visitors in innovative and environmentally sustainable ways.

Visitors share stories about the enviable lifestyles of local residents who live where the wild Southern Ocean shapes the shores of endless beaches where the magnificent rainforests of the Otways provide a haven for abundant wildlife and offer solitude and respite; and where the western volcanic plains merge with the horizon.

They tell of being invigorated by nature and the diversity of outdoor activities that are challenging, relaxing or both – surfing, diving, fishing, walking, hiking, cycling, touring, canoeing, golfing. Not to mention the simple pleasure of just chilling out.

They tell of the stunning trip along the Great Ocean Road, the limestone cliffs, the big surf and unspoilt beaches. They recount tales of enjoying the produce and local fare that tantalised their palettes.

They share mementos of their journey, treasures collected from local artisans whose works are inspired by the colours and moods of big nature.

International visitors especially tell of their experience in a fresh, unspoilt part of the world where nature dominates, and where they escaped from their crowded city lives and busy schedules.

Yes, they envy the locals for how lucky they are, and admire their care for their environment, heritage and cultures. And they marvel at how welcoming, friendly and willing people are to share their special places with visitors.
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The Great Ocean Road region, includes the coast and hinterland covering the geographic area from Torquay in the east, to the South Australian border in the west, is a significant national and international tourist destination. It attracts over five million visitors annually, significantly more than the popular Australian tourist destinations of the Great Barrier Reef, Northern Territory, Australian Capital Territory and Blue Mountains, and the competing Victorian coastal regions of Gippsland and Phillip Island (See Figure 1).

**Purpose of the plan**

This Strategic Master Plan has been prepared by Great Ocean Road Regional Tourism Ltd (GORRT Ltd), in association with participating local government authorities, local tourism organisations, industry and community leaders, and other key stakeholders and industry partners.

The purpose of this Strategic Master Plan is to provide leadership and direction to the region’s tourism industry. It has been developed to facilitate a shared mission and vision amongst stakeholders to develop a sustainable and valued visitor economy. This is not a Plan for GORRT Ltd but a Plan for the Great Ocean Road region. The Plan calls for a collaborative approach to the development, management and marketing of the region that contributes positively to the economic, environmental, social and cultural health of the region, individual destinations and stakeholders. This Strategic Master Plan is to lay a framework for strategies and actions that address the challenges and capitalise on the opportunities that will produce sustainable growth in the region’s visitor economy.

The primary objective of the Plan is to increase the yield generated from tourism visitation through the provision of quality visitor experiences, providing significant economic benefits to local communities.

The Plan proposes key initiatives and projects that will require detailed planning, supporting business cases, and stakeholder commitment and cooperative action to bring to fruition.

Short-term strategies and actions are focused on being affordable and achievable (realistic) and will establish the foundations for a significant increase in public and private investment in the medium and longer term. To not invest is simply not an option if the sector is to be sustainable.

This Plan identifies that the visitor economy could be the major economic driver for the region. For success, a true collaborative approach by all stakeholders is needed. Most importantly, it requires the region’s communities to be inspired by how the visitor economy contributes to their lifestyles, and to embrace the opportunity to share their part of the region with visitors.

**Figure 1:** Comparison of visitation to the Great Ocean Road region with select competitors

![Bar graph showing comparison of visitation](source:Tourism Research Australia (TRA).)

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GORRT Ltd will continue to facilitate the progressive development of a narrative to engage the region’s communities and all stakeholders, and to build a shared vision for a healthy, sustainable and prosperous local and regional economy.

**Key issues and opportunities**

There are a number of challenges and opportunities that are affecting the capacity of the Great Ocean Road region to achieve the full potential of its visitor economy. These include:

- **High visitation and low yield per visitor** – Significant growth in visitation to the region over the last 10 years, especially the dramatic visitation in day trippers, has not translated to an equivalent rise in visitor expenditure.

- **Limited seasonal dispersal** – There are significant seasonal peaks and troughs throughout the year which reduces investor returns and exacerbates skill shortages.

- **Limited geographic dispersal** – There is a heavy concentration of visitation along the coast and to the east of the region (closer to source markets). This poses a challenge to increase dispersal to hinterland areas and to the west of the region to spread the economic benefits of tourism and reduce visitation pressures along the coast.

- **Poor maintenance and development of publicly-managed visitor assets at many locations** – A lack of adequate government investment over the last decade has resulted in sub-standard experiences at some of the region’s most high profile and significant sites.

- **Further product development and investment is required to match visitor demand** – To increase visitor yield, it is critical to improve many of the region’s existing products, services and facilities, develop new ones and improve infrastructure to meet visitors’ expectations and preferences. There is also a lack of high quality accommodation to meet demand.

- **Variable quality of customer service across the region** – Excellence in customer service is a key ingredient to grow visitor yield. Greater value should be placed on staff training and processes to enhance customer service standards.

- **Congestion in peak periods and at popular locations** – This can significantly undermine the quality of visitors’ experience of the region, reducing length of stay and yield opportunities.

- **Strengthening of community engagement and support for tourism** – There is an opportunity to encourage local communities to further embrace the role as ‘hosts’ of visitors to their area with a view to sharing their special stories and place with others, as well as supporting local employment and the sustainability of local businesses.

- **Growth needed in business participation and engagement in tourism** – A strong, connected network of tourism operators in the region has the potential to enhance professionalism, innovation and business sustainability.

- **Increase industry capacity and development** – Given the rapidly changing nature of the tourism industry, it is critical that tourism operators continue to develop their business skills, understanding of markets, and collaboration and leadership skills to leverage the benefits of co-operative efforts.
The keys to success

The region's visitor economy is significant at a local, regional, state and national level. To address these issues and opportunities, the Strategic Master Plan proposes a more co-ordinated approach to the development of tourism, with the establishment of new partnerships between all levels of government – local, state and federal – and industry and community stakeholders. This Plan is practical and action-focussed, and aims to guide, facilitate and motivate new levels of collaboration between stakeholders.

To enhance future national and international competitiveness, significant public and private sector investment will be required to build on the inherent strengths of the region. Significant planning for investment in public assets has already been undertaken, e.g., Shipwreck Coast Master Plan, and a number of private developments are scheduled to commence, or have already commenced. This will provide the impetus for further private and public investment.

The strategic directions of the Strategic Master Plan are based on the premise that success hinges firstly on enhancing existing assets and experiences (affordable and achievable), and secondly on delivering a wide range of new tourism assets and services at a destination level. These initiatives will reinforce the brand strengths of the region's destinations, increasing the region's holistic product offer, and ultimately delivering increased length of stay, enhanced satisfaction and yield.

Furthermore, the Plan is committed to addressing the balance between visitors' requirements and expectations, and community considerations. The Plan recognises the need to ameliorate the impact of high visitation on small coastal communities.

The Plan is market-driven and focussed on the visitor experience. It recognises that visitors are attracted to destinations and experiences that meet their specific needs and desires. It also acknowledges that satisfied visitors are the most powerful marketing strategy for a region, increasing the likelihood of return visits and positive word-of-mouth promotion.

A core foundation of the plan for the region is the development of specific Destination Action Plans prepared by a process of industry and community leader engagement. These plans identify actionable priorities that will make a sustainable difference to growing the local visitor economy.

To date eight plans have been completed. Plans completed include Torquay, Anglesea, Lorne, Apollo Bay, The Otways, 12 Apostles and the Hinterland, Warrnambool and Port Fairy. Additional plans will be undertaken as required.
The growth opportunity of the visitor economy

Through the implementation of this Plan, total visitor spending in the Great Ocean Road region has the capacity to increase by 3.5% per annum, after inflation, in the 6 years from 2014 to 2020\(^1\) (See figure 2). This is well above the alternative 'business as usual' forecast of 1.0% per annum growth in total regional visitor spending after inflation.\(^2\)

Under this Plan, by 2020 the Great Ocean Road region’s visitor economy will support 7,660 jobs from the direct impacts of visitor expenditure, plus over 5,000 jobs from the indirect impacts of visitor expenditure (see Figure 3). This will position the visitor economy as the dominant industry sector for employment in the region, with the total impacts of visitor spending representing 17% of the region’s expected employment and 21% of its Gross Regional Product.\(^3\)

Comparing the target growth forecast under this Plan with the ‘business-as-usual’ forecast, this Plan will generate an extra 16% of current regional tourism expenditure and gross regional product, and 10% of current regional employment, due to the direct impacts of tourism spending.

Figure 2: Direct economic impacts of the visitor economy for the Great Ocean Road region (2014, $m p.a.)

Figure 3: Jobs directly due to visitor spending in the Great Ocean Road region

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\(^1\) The growth forecasts are based on five years not the 10-year life of the Plan due to statistical variability.

\(^2\) Derived from official national level forecasts for regional Victoria.

\(^3\) Gross Regional Product is the preferred measure of industry contribution to the economic value added in a region. Economic value added is calculated to avoid double counting when measuring an industry’s output by excluding the value of inputs from a different industry.

Source: Decisive Consulting Pty Ltd.
Objectives

In order to realise the growth potential of the Great Ocean Road region’s visitor economy, the Strategic Master Plan aims to achieve the following objectives:

1. To increase visitor yield (total visitor expenditure in region) by 3.5% per annum after inflation. This is faster than the anticipated growth in yield for regional Victoria as a whole, producing a gain in market share of tourism spending in regional Victoria.

2. To increase visitor dispersal throughout the region, seasonally and mid-week. Increase the share of total domestic annual visitor nights outside of the first four months of the year from 40% in 2014 to 50% in 2020.

3. To increase visitor satisfaction (benchmarked by an annual visitor survey).

4. To increase public and private investment in development and maintenance of infrastructure, product (accommodation and experiences) and visitor services ($1 billion over 10 years). To put this proposed investment over a decade in context, it represents 15% less than one year’s current visitor spending in the region. The region in the last decade has endured a comparative investment drought, so catch up is overdue.

5. To increase business and community participation, engagement and support.

6. To increase business excellence.

7. To manage the impact of large visitor numbers to destinations.

8. To cooperatively resource the capacity of the region to deliver the Strategic Master Plan.

Key strategies

The Strategic Master Plan identifies three key strategies to sustainably grow the region’s visitor economy:

- **Development**
  To maintain and develop the visitor infrastructure, product and experiences of the region, its destinations, attractions and facilities to meet/exceed sustainable standards consistent with competitive demand expectations.

- **Marketing**
  To market the region, its destinations and experiences to target markets to maximise visitor economy yield and dispersal outcomes.

- **Management**
  To manage visitor growth to minimise impacts on communities and the environment, and to develop the capacity of the industry to maximise the sustainable growth of the region’s visitor economy.
Priority actions

This Strategic Master Plan identifies the enormity of the task facing the region to develop a sustainable and vibrant visitor economy and recommends 80 actions for implementation over the next ten years. These actions are identified and explained in sections 3.1 to 3.3.

These actions will be prioritised and form part of a rolling three year action plan to assist all stakeholders in the development and preparation of their respective plans and programs.

These 80 actions have been grouped into seven key themes to facilitate the development of the action plan:

1. Shipwreck Coast Master Plan – providing an enhanced visitor experience in the Twelve Apostles/Port Campbell precinct.
2. Investment attraction and facilitation, both public and private, to address current product gaps i.e. large scale accommodation and new product and experiences to meet the changing consumer needs.
3. Maintenance and renewal of signature product/experiences e.g. Twelve Apostles, Great Ocean Road, Tower Hill, Wildlife (e.g. koalas at Kennett River, Cape Otway), Australian National Surf Museum, Flagstaff Hill Maritime Village, Indigenous product including Budj Bim.
4. Destination Development – ongoing implementation, development and renewal of local destination action plans.
5. Focus on product development, marketing and visitor servicing to generate increased length of stay, increased spend and dispersal.
6. Industry capacity building to grow the quality of the visitor experience.
7. Actions to address the challenges of peak visitation in coastal areas i.e. traffic congestion, car parking etc.

Implementation of the Strategic Master Plan

As a first step, GORRT Ltd will seek endorsement of the Strategic Master Plan by key stakeholders.

GORRT Ltd will then facilitate the implementation of the Plan, and monitor and communicate outcomes to stakeholders.

Instrumental to the Plan’s delivery will be the development of a collaborative approach at the regional level, as well as a commitment and collaborative approach at the destination level. This will be facilitated by GORRT Ltd.

Activity at a destination level will occur through the implementation and regular review of the eight priority Destination Plans completed in 2014/15. Other destination plans will also be prepared and implemented as required.

GORRT Ltd will also conduct an annual review of the Strategic Master Plan and prepare rolling Three-Year Implementation Plans.
Part 1 The visitor economy landscape
1.1 DEFINING THE REGION

The vast Great Ocean Road region spans from Torquay along the south coast of Victoria westwards to the South Australian border, and includes the local government areas (LGAs) of Surf Coast, Colac Otway, Corangamite, Moyne, City of Warrnambool and Glenelg.

While Greater Geelong and the Bellarine provide an eastern gateway to the region, Tourism Greater Geelong and the Bellarine are responsible for undertaking strategic planning for this section of the region and its destinations. Where appropriate this Master Plan identifies strategic opportunities for collaboration and cooperation.

1.2 REGIONAL STRENGTHS

The Great Ocean Road region connects unforgettable road touring with spectacular natural attractions. The region encompasses a coastline that hugs the Southern Ocean from Torquay to the South Australian border, and includes the gazetted and nationally and internationally significant Great Ocean Road which covers from Torquay to Allansford, as well as a hinterland of rich and changing landscapes including the majestic rainforest of the Otways, the rolling green pastures of rich agricultural lands and the rich volcanic plains. The region’s natural attractions are home to native Australian wildlife, a stage for outdoor active experiences, and provide the region with an abundance of fresh produce. The towns, cities, villages and hamlets of the region celebrate their history and heritage, and provide experiences of local life. Artists and artisans are inspired by the colours, shapes and stories of the region, and through their creative works offer visitors new insights into its past and present.

An unrealised and underdeveloped visitor experience asset of the region is its rich Indigenous heritage.
1.3 TOURISM MANAGEMENT OF THE REGION

Regional tourism in Victoria has evolved substantially over the past two decades, driven by the intervention strategy developed and applied by Tourism Victoria since 1993 to address inherent market weakness.

This strategy involved building a cooperative approach to the marketing of the product strengths of regional Victoria through the establishment of Campaign Committees for each of the designated product regions. The strategy intended that over time the ‘industry’ (business, industry organisations and local government) would assume the primary leadership and operational role in partnership with the State Government.

Tourism Victoria’s Regional Tourism Action Plan produced in 2006, proposed the replacement of Campaign Committees with independent Regional Tourism Boards with a broader role of industry development as well as marketing. All regions adopted this new model, however attempts to apply the structure to a larger Great Ocean Road region also including Geelong and the Bellarine was unsuccessful. As a result, between 2006 and 2013 the region was without cohesive leadership. It lost market opportunities, had a diminished capacity to respond to profound market change and challenges, and generally stagnated. The lack of a regional strategy and cohesive advocacy also resulted in neglect by successive governments of the maintenance of critical public tourism assets, facilities and services. This had a compounding impact on deterring private sector investment in product development. Despite this, the region has continued to achieve visitation growth, maintaining its position as the most visited region outside of Melbourne, albeit with serious issues of low yield and dispersal.

The comparatively poor performance in growing regional visitor economy (as defined in this report) spending, detailed in Figure 1.2, is evidence of the impact of a lack of regional tourism leadership.

Figure 1.2 Great Ocean Road region underperformed in the absence of regional tourism leadership 2007-2013

![Figure 1.2](image_url)

Source: Tourism Research Australia (TRA), regional expenditure estimates.
1.3 TOURISM MANAGEMENT OF THE REGION CONT.

Over this seven-year period, total visitor economy spending after inflation fell slightly in the Great Ocean Road region. It lagged behind the slow growth in after-inflation visitor spending in regional Victoria as a whole, and had significantly lower than the comparatively rapid growth in visitor spending in the Melbourne region.

During this period, the Great Ocean Road region was most successful in growing domestic day trip spending, which is the lowest yielding sector per visitor. The fall in international overnight visitor spending in 2013, while off a much smaller base, was still unusually low compared to the years immediately preceding it.

In July 2012, an Interim Regional Tourism Board was established to advise stakeholders (Tourism Victoria, local councils and industry organisations) on the structure and strategic direction of tourism for the region. This resulted in the establishment of Great Ocean Road Regional Tourism Ltd (GORRT Ltd) in November 2013, supported by five councils, Tourism Victoria and the tourism industry.

The board of GORRT Ltd prepared, and has commenced implementing, a Strategic Business Plan based on a ‘Think Differently’ business model that adopts and extends accepted regional tourism best practice. The framework of the business model, detailed in Figure 1.3 emphasises the importance of being customer focused, recognises that industry and community provide visitor experiences, whilst organisations like GORRT Ltd facilitate development, management and marketing to support and grow the visitor economy.

Figure 1.3 Great Ocean Road Regional Tourism Business Model leadership
1.4 DEVELOPMENT OF THE MASTER PLAN

Over 200 individuals and organisations were consulted and actively participated in the building of this plan, including tourism operators, local tourism and traders organisations, local councils, visitor information centres, land managers, State and Federal Government departments and other organisations.

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<td>Stakeholder interviews and workshops</td>
<td>Preparation of Draft Plan</td>
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<td>Distribution of Draft Plan to stakeholders - operators, local tourism organisations, Councils, land managers, state and federal organisations</td>
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<td>Distribution of Plan to key stakeholders including Councils for endorsement.</td>
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1.5 VALUE OF THE VISITOR ECONOMY

1.5.1 Share of gross regional product (GRP)

Tourism Victoria reported that in 2012/13 the direct economic impact of visitor spending was responsible for 6.1% of the Great Ocean Road regional economy (share of gross regional product). As such, the Great Ocean Road region is well above the regional Victorian average (4%) for its dependence on the visitor economy. Also, by way of comparison, the share of gross regional product from the direct economic impact of visitor spending in the Geelong region’s economy during the same year was 2.8%.

Allowing for estimated indirect impacts of visitor spending, the total (direct + indirect) economic impact of visitor spending was responsible for 14.9% of total gross regional product for the Great Ocean Road region.\(^4\) As with direct impacts, the total economic impact of visitor spending is much higher in the Great Ocean Road region than in the Geelong region (6.8%), and slightly higher than for regional Victoria as a whole (13.2%).

It is estimated that the visitor economy contributed a significantly larger share of gross regional product in the Great Ocean Road region in 2014 than in 2012/13. This is due in part to 2012/13 being an unusually weak year in measured tourist spending in the region (for example, lower than 2011/12). However, it was mainly due to the introduction of a changed methodology that boosted measured domestic tourism to the Great Ocean Road region in 2014. (See Appendix 1 for more details).

This report estimates that the direct impact of visitor spending in the Great Ocean Road region was responsible for 7.5% of the region’s economy in 2014 (up from 6.1% 18 months earlier). Similarly, it is estimated that the total (direct + indirect) economic impact of visitor spending in the region was responsible for 18.3% of its total gross regional product in 2014 (up from 14.9% 18 months earlier).\(^4\)

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\(^4\) The Tourism Victoria publication *Great Ocean Road Tourism Satellite Account Summary 2012-13* includes the Geelong region in its calculations. It does not separately estimate the proportion of indirect economic impacts for the Great Ocean Road (Western) region and the Geelong region. This publication assumes that the Great Ocean Road region has the same share of the combined region’s indirect economic impact as its share of direct economic impacts.

\(^4\) This estimate assumes that the Great Ocean Road regional economy grew at 2% per annum before inflation and 4.5% per annum after inflation between 2012/13 and 2014. It also assumes that the share of total (direct + indirect) economic impacts due to visitor spending had the same ratio in 2014 as in 2012/13.
1.5 VALUE OF THE VISITOR ECONOMY cont.

1.5.2 Tourism employment

The direct economic impact of the visitor economy has a larger share of regional employment than it has of gross regional product, as tourism is more labour intensive than most industries.

Employment generated by the direct impacts of visitor spending in the Great Ocean Road region in 2014 was estimated to be 6,730 jobs. This contributed approximately 9.7% of total employment in the region in 2014. The Tourism Victoria published estimate of the direct employment impact of the visitor economy in the Great Ocean Road region in 2012/13 was 6,300 jobs or 9.3% of total regional employment.

The total employment impact of visitor spending (direct + indirect) is estimated in this report to provide 16.4%, or one job in six in the Great Ocean Road region. ABS Census data 2011 indicates that young people (15-24 years of age) hold more than 35% of all tourism jobs in the region. Tourism provides more than 25% of all youth employment in the region, well ahead of the sum of agriculture/forestry/fishing at 7%, and manufacturing at 9%. As the ABS Census is conducted during the low season period, it is expected to underestimate the share of both young people in tourism employment, and the share of total youth employment in the tourism industry.

Clearly growth in tourism activity has some potential to address a significant issue of youth unemployment in the region. The industry should be supported to maximise opportunities to generate career paths for the region’s young people.

6 Tourism Victoria (2015), Great Ocean Road Tourism Satellite Account Summary 2012-13, pages 1 and 2
7 This estimate assumes that the Great Ocean Road regional economy grew employment at 1.5% per annum between 2012/13 and 2014. It also assumes that the share of direct and indirect in total economic impacts due to visitor spending has the same ratio in 2014 as in 2012/13.
1.5 VALUE OF THE VISITOR ECONOMY CONT.

1.5.3 Visitation

General trends

The Great Ocean Road region currently attracts in excess of five million visitors.\(^8\) Over the last decade, while tourist activity in visits and visitor nights to the Great Ocean Road region increased noticeably, growth in real tourist spending was far more restrained.

As indicated in Figures 1.4 and 1.5, domestic overnight visitors and visitor nights are far more numerous than international overnight visitors and nights.

From 2005 to 2014, domestic day trip visitors grew more rapidly (31%) than domestic overnight visitors (26%) and international overnight visitors (17%). Data from 2009 to 2014 shows that international day trip visitors increased by nearly 50%.

Between 2007 and 2013, there was a small fall in real tourist spending, although the overdue updating of domestic tourism measurement produced a large jump in real tourist spending in 2014.

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\(^8\) Research for this report has estimated that the region attracts approximately 500,000 international day trip visitors per annum, who contribute comparatively little to the regional economy. If it is assumed that each of these international day trip visitors spend $40 in the region this contributes only $20 million, or less than 1.7% of the direct tourist spending in the region.
## 1.5 VALUE OF THE VISITOR ECONOMY CONT.

### Domestic day trip visitation*9

| Visitation | The GOR region received nearly 2.6 million domestic day trip visitors in 2014 |
| Purpose of visit | 62% of visitors travelled for holiday or leisure |
| | 23% of visitors were visiting friends and relatives (VFR) |
| | 5% of visitors were on business |
| Demographics | 36% of visitors to the region were aged 15 to 34 years of age (18% were 15 to 24 years, and 18% were 25 to 34 years) |
| Yield | Domestic day trip visitors spent $259 million in the region |
| | On average, they spent $101 per trip |
| Seasonality | January is the single biggest month for domestic day trips. The first four months of the year averaged 41% of domestic day trips. The bias to January is even stronger for domestic overnight tourism. |

*9Tourism Research Australia (TRA), National Visitor Survey, YE Dec 14
1.5 VALUE OF THE VISITOR ECONOMY CONT.

Domestic overnight visitation

Visitation
- The GOR region received nearly 1.9 million domestic overnight visitors in 2014
- Visitors spent over 6.3 million nights in the region

Purpose of visit
- 64% of visitors and 73% of nights to the region were for holiday or leisure
- 25% of visitors and 19% of nights were for the purpose of visiting friends and relatives (VFR)
- 9% of visitors and 6% of nights were for business

Source markets
- 87% of visitors and 82% of nights were from intrastate markets – 51% of visitors and 45% of nights from Melbourne, and 36% of visitors and 37% of nights from regional Victoria.
- 13% of visitors and 18% of nights were from interstate, with the largest source market being South Australia at 6% of visitors and 7% of nights.

Demographics
- 35% of overnight visitors to the region were aged 25 to 44 years (18% were 35 to 44 years and 17% were 25 to 34 years)

Length of stay
- Visitors stayed on average 3.3 nights in the region

Yield
- Domestic overnight visitors spent $850 million in the region
- On average, each domestic overnight visitor spent $136 per night in the region.

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Tourism Research Australia (TRA), National Visitor Survey, YE Dec 14.
1.5 VALUE OF THE VISITOR ECONOMY CONT.

Seasonality

As indicated in Figure 1.7, between 1998 and 2014, 29% of all domestic visitor nights spent in the Great Ocean Road region were by visitors in January. Similarly, 55% of all domestic visitor nights were by visitors in the first third of the year (January to April). For Australia as a whole, these months only produce 38% of total annual domestic visitor nights, indicating that the Great Ocean Road region has much stronger month-by-month seasonality than the Australian regional average.

A key challenge for the Great Ocean Road region is to reduce the strong seasonality in domestic overnight tourism, which reduces investor returns, increases skill and staff shortages, and reduces the incentive to train long-term employees.

Figure 1.7 Share of domestic visitor nights in the Great Ocean Road region by month of returning home

Source: Tourism Research Australia (TRA) online.
1.5 VALUE OF THE VISITOR ECONOMY CONT.

**International overnight visitation**

<table>
<thead>
<tr>
<th>Visitation</th>
<th>The GOR region received 157,000 international overnight visitors in the year ending December 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Visitors spent 664,000 nights in the region</td>
</tr>
<tr>
<td>Purpose of visit</td>
<td>68% of visitors travelled for holiday or leisure</td>
</tr>
<tr>
<td></td>
<td>21% of visitors were visiting friends and relatives (VFR)</td>
</tr>
<tr>
<td></td>
<td>4% of visitors were on business</td>
</tr>
<tr>
<td>Source markets</td>
<td>The UK (15%) was the region’s largest source of visitors, followed by Germany (14%), other European markets (28%)</td>
</tr>
<tr>
<td>Demographics</td>
<td>25% of visitors were aged 25 to 34 years, which was the biggest age group of visitors to the region</td>
</tr>
<tr>
<td></td>
<td>19% were aged 55 to 64 years</td>
</tr>
<tr>
<td>Length of stay</td>
<td>Visitors stayed on average 4.2 nights in the region</td>
</tr>
<tr>
<td>Yield</td>
<td>International overnight visitors spent $57 million in the region</td>
</tr>
<tr>
<td></td>
<td>On average, they spent $97 per night in the region</td>
</tr>
<tr>
<td></td>
<td>On average, each international overnight visitor spent approximately $500 per trip in the region</td>
</tr>
<tr>
<td></td>
<td>If it is assumed that the international day trip market (500,000) not included in these figures spent $40 per trip in the region, then each international overnight visitor is worth around 12 international day trip visitors.</td>
</tr>
</tbody>
</table>

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11Tourism Research Australia (TRA), *International Visitor Survey, YE Sept 14*
1.5 VALUE OF THE VISITOR ECONOMY CONT.

1.5.4 Great Ocean Road region’s competitor set comparison

How does the Great Ocean Road region perform in its key markets against comparable regional destinations?

A method for analysing the market performance of the Great Ocean Road region is to consider the similarities and differences in performance against comparable regional destinations. For this exercise, five other regions were selected on the basis that: three competed for coastal-oriented, short-haul travellers from Melbourne (Mornington Peninsula, Phillip Island and Gippsland); Victoria’s High Country was considered as a region with a similar product mix; while Blue Mountains (NSW) was selected as a region with a nature based international icon close to a large city. Other regions with major regional cities have a very different market mix, while the Geelong region was considered a complementary destination to the Great Ocean Road region. Similarities across the five selected comparison regions and the Great Ocean Road region were found on the following criteria:

- Dominance of domestic tourism
- International visitors mainly on day trips not overnight
- Holiday travel dominating domestic overnight visits
- Length of stay of domestic overnight holiday and visiting friends and relatives (VFR) visitors
- Dominance of intrastate over interstate, and the state capital as the majority source of domestic overnights, highlighting where marketing should be focused.

Comparing the five regions, the Great Ocean Road region has strengths in:

- Domestic overnight tourism compared to domestic day trip spending
- Attracting international visitors with a higher proportion staying overnight than other iconic destinations of Phillip Island and the Blue Mountains
- Holiday visitors among domestic overnight visitors who have a longer average stay
- Attracting intrastate overnight holiday visitors from outside Melbourne
- Attracting young (aged 15 to 24 years) domestic overnight holiday visitors
- Attracting visitors to caravan parks and paid camping grounds
- Securing bookings for domestic holiday trips via the internet compared to coastal comparators
- Use of Visitor Information Centres.

Comparing the five regions, the Great Ocean Road region has weaknesses in attracting:

- Domestic overnight visiting friends and relatives (VFR) and business/other travel
- Interstate overnight holiday visitors (compared to other coastal Victorian comparators)
- High income domestic overnight holiday visitors
- Pre and early retirement (age group from 45-64) overnight holiday visitors
- Hotel/motel/B&B holiday visitors (compared to other coastal Victorian comparators).
1.6 CHALLENGES AND OPPORTUNITIES FOR TOURISM IN AUSTRALIA

Tourism in Victoria and Australia since 2000 has experienced an increasing number of challenges after decades of growth. Domestic tourism has been relatively flat and international tourism growth rates fell significantly. The impact on regional tourism has been profound.

The underlying external influences on tourism in Australia since 2000 include:

- The growth of low-cost domestic and international air travel
- The global economic downturn particularly in Australia’s traditional markets
- Fluctuating and historically high value of the Australian dollar
- Aging population
- Changing trends in consumer discretionary spending
- Melbourne’s increased range and quality of experiences, particularly major events
- Limited new investment in regional tourism infrastructure and product coupled with aging existing product
- Increased competition (tourism and non-tourism related)
- Declining traditional international markets and the rise of the Asian market
- Increased outbound travel by high yield domestic travellers
- The rise of online and social media and related decline of traditional distribution and information channels.

Victoria has generally weathered the cumulative impact of these primarily negative trends well compared with other states and territories. However, the performance is highly variable across the state, with Melbourne, and to a lesser extent, destinations close to Melbourne, faring far better than destinations more than two hours’ drive from the city.

The impact on the Great Ocean Road region has been variable; however, its brand has managed to remain strong during this period.
1.7 GLOBAL CHALLENGES AND OPPORTUNITIES – A CHANGING WORLD

The Great Ocean Road region as a significant international attraction also needs to take account of global changes in shaping a strategy for the future.

Amadeus recently released a study on the future traveller, ‘Future Traveller Tribes 2030 – Understanding Tomorrow’s Traveller’ (2015). This study identifies that by 2030:

- **Growing population** – The global population will expand by an extra billion people in the world of which 20% will be travelling
- **Changing global travellers** – Europe and North America will go from possessing over 60% of global share of international tourism to under 50%
- **Ageing societies** – a growing proportion of populations in advanced economies will be older and more mobile
- **Consumers will be more educated** and the working landscape will offer greater flexibility and choice
- **Wellbeing** will be defined more in experiential and less in material terms

- **There will be more choice**, new tools and applications that will transform the way consumers search for information, understand options and make choices
- **Proportion of social media users will reach saturation** (80-90% of the population will connect via social media) – failing to keep track means alienation
- **Personalisation** will pervade, pricing, packaging and content
- **Eco-ethical** concerns will feature in the consumer landscape
- **High speed connectivity** on multi-use devices will be the norm
- **Technology** will be integrated and seamless.
1.8 KEY CHALLENGES AND OPPORTUNITIES FOR THE REGION

This Strategic Master Plan aims to sustainably manage and grow the visitor economy, recognising the importance of the economic, environmental and social health of the region. In keeping with this, the very high visitation, short length of stay and low yield experienced at many locations in the region requires a strategic response. Issues associated with high visitation are particularly prevalent during peak periods, and include impacts on the environment and the residents of the coastal communities.

While most strategic tourism plans aim to achieve continued growth in visitor numbers, this Plan aims to increase yield by enhancing the visitor experience. This will be achieved through improving existing experiences, developing new products and services, and improving infrastructure. Facilitating geographic and seasonal dispersal can also help address visitor pressures, and increase yield during off-peak periods and to locations with fewer visitors. Visiting the coast and hinterland can be equally enjoyable outside the busy summer period provided businesses are open and experiences are aligned to the cooler weather.

The upgrade and maintenance of public assets is an urgent priority to improve tourism outcomes. Due to increasing demands on government funding, the condition of visitor infrastructure has deteriorated in recent years. In particular the substandard visitor experience of the iconic 12 Apostles and the inadequate maintenance and development of Great Ocean Road.

Parks Victoria and VicRoads will require significantly more funding to maintain public assets, or Government will need to consider more innovative management solutions including user pays and private sector partnerships.
In addition to the market changes discussed above, the Great Ocean Road region has a number of other significant supply and demand challenges and opportunities which will influence its future tourism growth. These include:

- Product development (accommodation, attractions and services), both existing and new, is required to meet market demand, e.g. there are significant gaps in high quality accommodation compared with other destinations.
- The outstanding diverse natural land, waterways and wildlife assets of the region present opportunities for high quality interpretation and visitor experience product development.
- Developing the unrealised Indigenous heritage and contemporary visitor experience opportunities.
- Visitor service standards must be elevated to meet market expectations, particularly for international travellers.
- Management of the tourism impacts at high visitation destinations such as the 12 Apostles and in smaller coastal ‘villages’, particularly during summer and public holidays, is essential.
- There are skills shortages across the sector
- Business participation by primary and tourism related businesses is low, i.e. less than 20% of businesses in the region actively participate in membership or cooperative marketing programs offered by local and regional tourism organisations.

- The substantial future growth of populations west of Melbourne and in the greater Geelong district will exacerbate traffic congestion, increase tourism management pressures in coastal destinations within close proximity, and will impact on the quality of visitor experience. Population growth will also provide new markets for the region.
- Equity of resourcing and the ‘politics’ of multiple local governments and state/federal electorates is of ongoing concern.
- Low population in high visitation areas creates a serious impediment to service capacity. Over time, tourism can be a catalyst for residential growth, which in turn stimulates the opportunity for small scale investments which can add richness and texture to the business and service mix.

The guiding principle in developing and prioritising strategies to address these significant challenges, and in taking advantage of the opportunities, is balancing the economic returns generated from the visitor economy, with managing the social/cultural impacts on local communities.
1.9 REGIONAL TOURISM SUCCESS FACTORS

Success Factors for Regional Tourism (Kayler-Thomson, May 2012) identified ten success factors and their respective characteristics of success.

Successful tourism regions exhibited:

1. Strong local tourism organisations
2. Strong regional organisations
3. Local government support for tourism
4. Leadership
5. Strategic planning
6. Consistent visitor servicing excellence
7. Research driven cooperative marketing
8. Breadth and depth of infrastructure, product and events to match demand
9. Risk management
10. Community support

An analysis of the region based on this model was undertaken in the preparation of the Destination Action Plans and supplemented by the views of the GORRT Ltd Board and management.

1. **Strong local tourism organisations**
   The strength, core role, focus and capacity of local organisations in the region are somewhat variable. Generally, the level of business participation is low, the resources very limited and the capacity to impact on visitor servicing, yield and dispersal is also limited. Critical to the long-term sustainability of the region is building connectivity and capability at the local organisation level. Local tourism organisations must lead industry engagement and provide a conduit for driving industry participation and cooperation to optimise visitor satisfaction.

2. **Strong regional organisations**
   The absence of a regional organisation has been a significant factor contributing to a loss of momentum and lack of industry engagement. This slowdown has led to unrealised opportunities, limited cooperation and lack of cohesive and coordinated advocacy.

   The establishment of GORRT Ltd offers the prospect of addressing this fundamental weakness but is dependent on stakeholders at all levels realising the potential of contributing to a regional approach. A strong regional organisation is all the more important given that no one local government area (LGA) is dominant in population or tourist attractions and can therefore provide strong leadership to the whole region.
4. **Leadership**

Leadership at a local/destination level is variable across the region and until the establishment of GORRT Ltd, was absent at a regional level.

5. **Strategic planning**

The region has never had a holistic strategic plan covering the development, management and marketing of tourism for the entire region. The causal factors were often left unidentified or overlooked and under-analysed. This process aims to correct this fundamental deficiency and provide a Plan that is owned and embraced by all stakeholders.

6. **Consistent visitor service excellence**

The levels of visitor servicing are highly variable throughout the region and need to be enhanced if yield is to be increased. To be a world-class destination, the region must deliver on its promise and provide a seamless, memorable visitor experience that meets the demands and expectations of visitors.

The opportunity to focus on creating a competitive advantage from visitor service excellence will be a major strategic priority.

7. **Research driven cooperative marketing**

The region has had a good record of cooperative marketing, evidenced in the international market via The Great Southern Touring Route. For domestic intrastate and interstate markets, the brand is also strong and past marketing has had a legacy effect. However, whilst this has stimulated strong visitation, increasing yield and dispersal requires close attention.

The market has changed profoundly and will continue to do so. The priority need is to address the primary plank of tourism destination marketing: the visitor experience.

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1.9 REGIONAL TOURISM SUCCESS FACTORS **CONT.**

3. **Local government support**

The lack of strong local and regional tourism organisations has seen local governments fill the void to an extent, especially through the provision of visitor information services. However this, unsurprisingly, has resulted in a LGA centric rather than cooperative regional focus. Municipal boundaries between the six local government areas are irrelevant to visitors.

The cooperative intent and current funding support by Councils to GORRT Ltd is highly commendable and offers the prospect of regional and local partnerships to maximise cooperation, facilitate resource sharing and minimise duplication.

Generally, Councils understand the importance of tourism to the regional and local economies and communities, but the real value is often under recognised in Council priorities accorded tourism issues and in resource allocation.

The report by the Interim Board advised that to be competitive and achieve real growth would require a 30 to 50% lift in funding by governments and the industry.

‘A key aspect of this plan was development of estimates of the value of the visitor economy at a local government level. Previous estimates had been based on Census 2011 results, which underestimate the economic importance owing to their collection during the early August low season for tourism. Estimates were developed on a year average basis using the regional tourism satellite account developed by Tourism Victoria.’

‘In addition, the revised methodology for collecting domestic tourism data from Tourism Research Australia from the beginning of 2014, has significantly increased the value of tourism to local government areas in this region.’
Community attitudes appear to be polarised and there has been ample evidence of anti-tourism or ‘NIMBY’ (not in my backyard) attitudes, particularly towards new developments. In many cases this has eventuated because of a lack of engagement by the industry and government with potentially affected communities.

There has not been a concerted and cooperative effort to engage the community in understanding the value of tourism, and how and why it contributes to the health and wellbeing of the region and its communities. Further work could be undertaken to demonstrate the opportunities available in the region’s tourism industry to meet the career and business aspirations of the region’s young people.

1.9 REGIONAL TOURISM SUCCESS FACTORS CONT.

8. **Breadth and depth of infrastructure, product and events matched to demand**

   While the region and its destinations have good base infrastructure and strong natural attractions, there is a critical need for substantial investment to meet current and future demand and a need to build activity/experience based product to capitalise on the natural attraction. Arguably this is the biggest challenge for the Great Ocean Road region. There is a strong case for investment in infrastructure and product in this nationally significant region.

9. **Risk Management**

   Most municipalities and state agencies have risk management plans; however there is a limited regional tourism risk management planning, capacity and preparedness, particularly for bushfires. The highly visited ‘villages’ between Bellbrae to the East and Princetown in the West are considered to form one of Australia’s highest bushfire risk regions. The risk is further accentuated by limited access and peak visitation during summer.

10. **Community support**

    The community understanding of the value of tourism and support for its development is variable throughout the region. Issues exist such as the impact of high season visitation on local residents (e.g. Surf Coast), localised opposition to development projects, discrepancies between coast versus hinterland visitation, jobs, changing economic impacts on traditional industries, and variable understanding of the contribution of tourism to the current and future economic health of local communities.
Part 2  Strategic direction – whole of region
2.1 FORECAST SCENARIOS FOR TOURISM

Two scenarios for tourism growth to the Great Ocean Road region

SCENARIO 1 – ‘BUSINESS AS USUAL’

The business as usual forecasts draw upon the existing official national forecasts for long-term growth in tourism to regional Victoria from June 2013.\(^1\)

The resulting ‘business as usual’ forecasts are for slow growth in tourism to the Great Ocean Road region, and a declining share of tourism spending in Victoria and share of the region’s economy due to tourism. This low forecast growth reflects that the region is dependent on low growth overnight domestic tourism and has a low share of high-growing international overnight tourism.

Growth totalling 6\% in the 6 years from 2014 to 2020 is implied for real (after inflation) regional tourism expenditure and direct tourism contribution to GRP for the Great Ocean Road region or compound growth of 1\% per annum. Real regional tourism expenditure under this scenario increases from $1,196 million to $1,270 million.

The direct impact of tourism on gross regional product under this scenario increases from $541 million in 2014 to $574 million in 2020.

Employment growth due to the direct impact of tourism spending under this scenario is expected to occur at 0.6\% per annum and produce an extra 248 jobs in the region in 2020 compared to 2014.

SCENARIO 2 – A 3.5\% GROWTH TARGET FOR THE IMPLEMENTED STRATEGIC MASTER PLAN

The alternative forecasts assume that the 2015 Strategic Master Plan for the Great Ocean Road Region Visitor Economy is effective in increasing visitation, average length of stay and spend in the region.

The Victorian Regional Tourism Strategy 2013-2020 implicitly forecasts 2.6\% annual real growth in tourism expenditure in regional Victoria. This forecast is predicated on delivery by the State Government of a range of initiatives for regional Victoria in association with the Government’s 2020 Tourism Strategy.

Setting ‘a growth target forecast’ directly recognises that the Great Ocean Road region is in catch-up mode to advances in tourism regional leadership, marketing and development made in other areas of regional Victoria since 2006. Implementation of the new Strategic Master Plan promises improved industry marketing and product development co-ordination and renewed investment in attractions and accommodation, as compared to the situation over the last nine years.

\(^1\) Subsequent official forecasts from June 2014 did not include regional Victoria forecasts and reduced the growth of Australian domestic tourism and total tourism expenditure.
2.1 FORECAST SCENARIOS FOR TOURISM CONT.

The further justifications for a higher growth target for the Great Ocean Road region compared to regional Victoria as a whole includes:

- A detailed review of the impact on tourism spending expected from projects proposed in the new Strategic Master Plan. For example, the ‘Case for Investment’ report identified 14 projects that promised to increase annual tourism spending in the region by $200 million in the fourth year – or the difference between the two forecast scenarios in 2020.

- The region’s strong international awareness provides a greater propensity to benefit from a near 25% lower Australian dollar against the US dollar compared to when official forecasts were last released for regional Victoria in June 2013.

- Focus by Tourism Australia to promote Australia’s aquatic and coastal experiences.

- Rapid population growth of south-west and western Melbourne which ensures faster growth for domestic day trips and domestic overnight tourism.

- Reducing vehicle travel times from Melbourne. There is a positive impact of recent road improvements to travel times by car to the Great Ocean Road from Melbourne including the duplication of the Princes Highway west of Geelong.

The ‘growth target forecast’ is 3.5% annual real growth in tourist expenditure for the Great Ocean Road region or just under 1% per annum above regional Victoria as a whole. Achieving this target is expected to result in the region slowly re-gaining tourism market share in regional Victoria, and steadily building its existing large share of the Great Ocean Road regional economy.

Growth of 3.5% per annum is equivalent to 23% growth in the six years from 2014 to 2020 for real (after inflation) regional tourism expenditure and direct tourism contribution to GRP for the Great Ocean Road region. Real regional tourism expenditure under this scenario increases from $1,196 million to $1,470 million.

The direct impact of tourism on gross regional product under this scenario increases from $541 million in 2014 to $665 million in 2020.

Employment growth under this scenario is expected to occur at 2.1% per annum and produce total employment due to direct tourism spending of 7,656 jobs in 2020.

This is equivalent to an extra 925 jobs in the region due to the direct impact of tourism spending in 2020 compared to 2014.
### 2.1 Forecast Scenarios for Tourism Cont.

**Figure 2.1.** The tourism forecasts for the Great Ocean Road Region Strategic Master Plan

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Real GOR Region Tourism Expenditure ($m 2014)</th>
<th>Real GOR Tourism Direct Gross Regional Product ($m 2014)</th>
<th>GOR Regional Employment Due to the Direct Impact of Tourism Spending (Jobs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012/13</td>
<td>$910</td>
<td>$411</td>
<td>6,300</td>
</tr>
<tr>
<td>2014 – Base year</td>
<td>$1,196</td>
<td>$541 *</td>
<td>6,730 *</td>
</tr>
<tr>
<td>2020 – Business as Usual Scenario</td>
<td>$1,270</td>
<td>$574</td>
<td>6,978</td>
</tr>
<tr>
<td>2020 – Strategic Master Plan Growth Target Scenario</td>
<td>$1,470</td>
<td>$665</td>
<td>7,656</td>
</tr>
<tr>
<td><strong>Difference in the two scenarios in 2020</strong></td>
<td><strong>$200</strong></td>
<td><strong>$91</strong></td>
<td><strong>678</strong></td>
</tr>
</tbody>
</table>

*Estimate
2.1 FORECAST SCENARIOS FOR TOURISM CONT.

Expressed in terms of tourism activity and employment in 2014, the difference between the two scenarios for year 2020 is worth 17% of current regional tourism expenditure and gross regional product, and 10% of current regional employment due to the direct impacts of tourism spending.

The Great Ocean Road region target growth of 3.5% per annum in gross regional product due to tourism is very similar to the target growth of 3.4% per annum (to 2025) from the Boston Consulting Group for Victoria as a whole. The BCG growth targets were an input to the review of the Victorian visitor economy.

What is necessary to deliver the ‘growth target forecasts’?

The core requirement is strong regional tourism strategic leadership and collaboration. This will require open-minded thinking on how to best retain and build on the strengths of the past and how to organise and resource the collective capacity of stakeholders to sustainably increase competitiveness and performance excellence. Leadership to encourage and apply positive regional and destination advocacy for the region as well as its destinations will be important.

Delivering the growth target for the Strategic Master Plan will require exploiting or optimising the region’s significant comparative advantages and opportunities such as:

- World class land and seascapes
- Proximity to Melbourne as an international and interstate gateway and with a large and growing population (especially in the west).
- Strong international market visitation including from high-growth Asian markets.
- Strong Great Ocean Road brand and high market awareness.
- Further development of experiences available from the diversity of destinations and attractions, particularly nature based.
- A collection of both major international and local events.
- Well-resourced regional and local tourism and visitor services.
- A number of prospective private sector investments in new and enhanced product development.
- The Great Ocean Road touring experience.
- National landscapes recognition by Tourism Australia.
- The longer term potential of Avalon airport expansion as an international port.

The balance of this Strategic Master Plan sets out in more detail the requirements for delivering the target growth for total regional visitor spending in 2020, building on analysis of regional tourism success factors and the region’s current markets.

Realising the full potential of the visitor economy

To realise the long term full potential of the visitor economy of the region will require one billion dollars investment in public and private infrastructure, product development and maintenance over the life of this Plan (e.g. Shipwreckcoast Master Plan implementation, Great Ocean Road and regional roads maintenance and development, National Parks and Coastal visitor facilities, accommodation, resort and experiences development).

In the short term, to 2020, the focus of this Plan is on affordable and achievable development and maintenance to improve the visitor experience. This can be achieved by progressive investment by the three levels of government and the private sector (existing and new), guided by Destination Action Plans.
2.2 VALUES

To achieve a strategic and collaborative approach to the development, management and marketing of the region requires a collective, focused and agreed culture that aligns the strategic approach with the goals, priorities and means of implementation for all stakeholders. This culture is reflected in the cooperative and shared values proposed for the region’s stakeholders.

1. **Collaboration and engagement**
   Fostering collaboration and engagement with, and between, stakeholders is critical to the development of a healthy, cohesive and responsible tourism industry that delivers outstanding visitor experiences.

2. **Taking responsibility**
   Understanding the impacts of activities, upon other people and the environment. Stakeholders take responsibility for their behaviours, actions and achievements when:
   - Working with other stakeholders
   - Providing commercial services
   - Communicating to visitors
   - Making decisions that impact upon the environment.

3. **Democratic leadership**
   Leadership in tourism is by way of facilitation of discussion, acknowledging the different needs, values and drivers of stakeholders and incorporating a democratic and inclusive approach to decision making.

4. **Financial well-being**
   Being commercially viable as an industry and understanding that the profitability of local businesses is essential to the sustainability of tourism, employment and desirable in terms of enjoying good quality of life.

5. **Flexibility and adaptability**
   To survive in a comparatively unpredictable, rapidly changing industry with a diverse range of stakeholders, requires a collective willingness to lead change, and be responsive to change.

6. **Authenticity and realism**
   In order to be genuinely collaborative and build successful partnerships between the tourism industry and communities, stakeholders need to be authentic in the way they relate to others and have realistic expectations.

7. **Inclusiveness and acceptance of diversity**
   Stakeholders are conscious of, include and respond to the needs of a diverse range of stakeholders and visitors and their cultures to the region.

8. **Agents for change**
   Collective stakeholder leadership roles provide the opportunity to work towards improving the social, economic, cultural and environmental health of the region.

9. **Conscious hosts**
   All stakeholders value the environment and culture of the region and its destinations and we are proud to share with visitors.
2.3 OBJECTIVES

1. To increase visitor yield (total visitor expenditure in region) by 3.5% per annum after inflation. This is faster than the anticipated growth in yield for regional Victoria as a whole, producing a gain in market share of tourism spending in regional Victoria.

2. To increase visitor dispersal throughout the region, seasonally and mid-week. Increase the share of total domestic annual visitor nights outside of the first four months of the year from 40% in 2014 to 50% in 2020.

3. To increase visitor satisfaction (benchmarked by annual visitor survey).

4. To increase public and private investment in development and maintenance of infrastructure, product (accommodation and experiences) and visitor services ( $1 billion over 10 years). To put this proposed investment over a decade in context, it represents 15% less than one year’s current visitor spending in the region. The region in the last decade has endured a comparative investment drought, so catch up is overdue.

5. To increase business and community participation, engagement and support (multiple measures).

6. To increase business excellence.

7. To manage the impact of large visitor numbers to destinations (annual shareholder and community survey).

8. To cooperatively resource the capacity of the region to deliver the Strategic Master Plan (GORRT Ltd. and local government annual resources assessment).
2.4 TARGET MARKET PROFILE SUMMARY

Introduction

There is currently a wide range of tourism markets visiting the region. However, it is important to identify which markets the region should aim to attract more of, in order to guide marketing and product development efforts, i.e. we need to know who we should be talking to and who we should be creating experiences for. These visitor markets are referred to as the region’s target markets.

There are a number of factors that influence the selection of the region’s target markets. These include:

- Consistency with the markets targeted by Tourism Victoria
- Capacity to achieve the region’s tourism objectives
- Alignment of values that are consistent with the region’s tourism values
- Propensity to travel
- Interest in the region’s products; and
- Capacity to influence other visitor markets.

In essence, the region’s target markets should meet the following criteria:

- Generate higher levels of expenditure per trip than the average traveller
- Have a greater interest in visiting different locations around the region, and in visiting during different seasons
- Be interested in, and respectful of, the communities they are travelling through
- Be interested in authentic experiences and interactions
- Have a strong interest in nature-based, cultural, food and wine, and heritage experiences
- Have a preference for environmentally sustainable products and services; and
- Be active communicators on social media and other channels.
2.4 TARGET MARKET PROFILE SUMMARY CONT.

Defining the region’s target market

An evolving body of market research has identified a growing segment called ‘The Conscious Consumer’ which demonstrates the following characteristics:\(^{13}\)

- They are re-inventing themselves and their world-setting the trends; spend more, care more and demand more
- Value what’s slow, small, and simple and aim for self-reliance
- Are connected and communicative - please them and they’ll help build your business
- Are social human beings who don’t want to be treated as wallets or eyeballs
- Seek meaningful experiences that help them develop
- Want experiences that are real, authentic and personal
- Want to buy from suppliers that think globally but act locally.

A study\(^{14}\) has also identified that there is a growing, global ‘values-driven’ market called ‘cultural creatives’ (over 50 million people in the USA alone) who have the following attributes:

- Love of nature and deep caring about its preservation, and its natural balance
- Strong awareness of the planet-wide issues like climate change and poverty and a desire to see more action on them
- Willingness to pay higher taxes or spend more money for goods if that money went to improving the environment
- Heavy emphasis on the importance of developing and maintaining relationships
- Heavy emphasis on the importance of helping others and developing their unique gifts
- See spirituality as an important aspect of life, but worry about religious fundamentalism
- Desire equality for women and men in business, life and politics
- Concern and support of the wellbeing of all women and children
- Want politicians and government to spend more money on education, community programs and the support of a more ecologically sustainable future
- Want to be involved in creating a new and better way of life
- Are concerned with big business and the means they use to generate profits, including destroying the environment and exploiting poorer countries
- Unlikely to overspend or be heavily in debt
- Dislike the emphasis of modern cultures on ‘making it’ and ‘success’, on consuming and making money
- Like people, places and things that are different or exotic.

Given the criteria for the region’s target markets, including consistency with tourism values and objectives, GORRT Ltd has sought to delineate the Australian visitor market that demonstrates this type of mindset and values.

\(^{13}\) Pollock, Anna, www.conscious.travel/theconscioustraveller/

2.4 TARGET MARKET PROFILE SUMMARY cont.
DOMESTIC PROFILE – Lifestyle Leaders

In the past, Tourism Victoria and the Great Ocean Road region targeted values segments developed by Michele Levine of Roy Morgan Research and Colin Benjamin of the Horizons Network called Socially Aware, Young Optimist, Visible Achievement and Traditional Family Life.

A review of Victoria’s target markets in 2013 revealed that additional marketing insights could be attained by segmenting the Australian travel market according to people’s product preferences, as well as their mindset (attitudes, motivations and behaviours). Through this analysis, the Lifestyle Leader segment was identified as Victoria’s primary target market.

Lifestyle Leaders can be described as people who are progressive, curious, socially and technologically active through a broad range of platforms, adhere to and seek status, and follow and propagate trends.

They are forward thinking, interested in discovering new experiences through travel, and are more likely to share those experiences with and seek to influence, their family and friends. They are higher in affluence and discretionary expenditure, and they can afford to indulge more often than the average Australian.

Within the Lifestyle Leader segment are four sub-segments – Inspired by Nature, Creative Opinion Leaders, Food and Wine Lifestylers, and Enriched Wellbeing. Given the preference for the mindset and values of the ‘Conscious Consumer’ and ‘Cultural Creatives’ (see page 42), GORRT has identified the Enriched Wellbeing and Inspired By Nature sub-segments as the most appropriate for the region. The region also has the closest product match with the travel preferences of these sub-segments.

However, there are experiences, products and services in the region that meet the expectations of all sub-segments. (See Figure 2.1: Lifestyle Leader Sub-Segments for more information).
2.4 TARGET MARKET PROFILE SUMMARY CONT.

Source: Roy Morgan and Tourism Victoria

**Figure 2.1** Lifestyle Leader Sub-segments

- **Culture vultures who seek authenticity**
  - **KEY INFLUENCERS**
    - Leading designers and architects, artisan, craft bloggers, Lost and Found audience.
  - **KEY EXPERIENCES**
    - Live music
    - Creative arts
    - Laneways
    - Coffee culture
    - Art galleries
    - Events

- **Nature refreshes, inspires and connects me**
  - **KEY INFLUENCERS**
    - MD of Red Bull, adventure/extreme sports photographers and bloggers.
  - **KEY EXPERIENCES**
    - Spectacular natural landscapes and experiences with nature
    - Wildlife eg. penguins, landscapes, ecododges
    - Walks and cycling

- **Great food and wine are the heart and soul of life**
  - **KEY INFLUENCERS**
    - Sommeliers and leading chef personalities (Matt Preston)
  - **KEY EXPERIENCES**
    - Awarded restaurants and chefs
    - Wineries and cellar doors
    - Local produce and farmers markets

- **All about wellbeing and living a rich and balanced life**
  - **KEY INFLUENCERS**
    - Health and lifestyle magazine editors (eg. Jackie Frank)
  - **KEY EXPERIENCES**
    - Natural mineral water springs and geothermal springs
    - Villages
    - Outdoors
INTERNATIONAL PROFILE – Experience Seekers

Tourism Australia undertook a research project which identified common segments across different cultures that would be receptive to the Australian experience, and called them the ‘Experience Seeker’. This target market is highly predisposed to Australia’s offer and is more likely to stay longer, spend more and disperse to regional areas.

Experience Seekers are, by definition, looking for unique, involving and personal experiences from their holidays. Using psychographic research, studies identify how travellers think and feel to determine the personal factors that influence them to travel. Experience Seekers are long-haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. They constitute around 30 to 50% of all potential long-haul, outbound travellers from our key source markets.

Experience Seekers can be found among all age groups, income levels and geographic locations. In each of Tourism Australia’s markets around the world, the Experience Seeker profile is refined and the most appropriate segment targeted.

Research has shown that the Experience Seeker has a number of key ‘wants’ to satisfy their travel experience:
- Authentic personal experiences
- Social interactions
- Meeting and interacting with the locals
- Experiencing something different from their normal day-to-day life
- Understanding and learning about different lifestyles and cultures
- Participating in the lifestyle and experiencing it, rather than observing it
- Challenging themselves – physically, emotionally and/or mentally
- Visiting authentic destinations that are not necessarily part of the tourist route; and
- Exposure to unique and compelling experiences.

Typically Experience Seekers are more likely to be:
- Experienced international travellers
- Opinion leaders
- Open minded; and
- Selective in their media consumption.

Other features of Experience Seekers are:
- Travel is an important part of their lifestyle
- They stay longer and spend more
- They travel beyond the major cities
- They are less materialistic
- They have a higher than average household income; and
- They are well educated and informed on a range of subjects.

There is a significant overlap between the mindset and preferences of the international Experience Seeker market and the Lifestyle Leader sub-segments targeted by Tourism Victoria and the Great Ocean Road region.
Part 3 Strategic priorities – whole of region
This Strategic Master Plan identifies three key strategies for the region:

1. **Development**
   To maintain and develop the visitor infrastructure, product and experiences of the region, its destinations, attractions and facilities to meet/exceed sustainable standards consistent with competitive demand expectations.

2. **Marketing**
   To market the region, its destinations and experiences to target markets to maximise visitor economy yield and dispersal outcomes.

3. **Management**
   To manage visitor growth to minimise impacts on communities and the environment, and to develop the capacity of the industry to maximise the sustainable growth of the region’s visitor economy.
Priority actions

This Strategic Master Plan identifies the enormity of the task facing the region to develop a sustainable and vibrant visitor economy and recommends 80 actions for implementation over the next ten years. These actions are identified and explained in sections 3.1 to 3.3.

These actions will be prioritised and form part of a rolling three year action plan to assist all stakeholders in the development and preparation of their respective plans and programs.

These 80 actions have been grouped into seven key themes to facilitate the development of the action plan:

1. Shipwreck Coast Master Plan – providing an enhanced visitor experience in the Twelve Apostles/Port Campbell precinct.
2. Investment attraction and facilitation, both public and private, to address current product gaps i.e. large scale accommodation and new product and experiences to meet the changing consumer needs.
3. Maintenance and renewal of signature product/experiences e.g. Twelve Apostles, Great Ocean Road, Tower Hill, Wildlife (e.g. koalas at Kennett River, Cape Otway), Australian National Surf Museum, Flagstaff Hill Maritime Village, Indigenous product including Budj Bim.
4. Destination Development – ongoing implementation, development and renewal of local destination action plans.
5. Focus on product development, marketing and visitor servicing to generate increased length of stay, increased spend and dispersal.
6. Industry capacity building to grow the quality of the visitor experience.
7. Actions to address the challenges of peak visitation in coastal areas i.e. traffic congestion, car parking etc.
3.1 DEVELOPMENT

The Great Ocean Road region boasts amongst its many assets, the national heritage listed Great Ocean Road and one of Australia’s most iconic visitor attractions; the 12 Apostles. One indicator of its significance, is international visitation to the region of over 600,000 people each year.

Major public infrastructure (roads and natural attractions) that is critical to the sustainability of the tourism industry has been allowed by successive State Governments to decay through a lack of funding support. Public safety has been compromised, with some key assets now substandard or closed due to a lack of maintenance. Car parking and access servicing a number of key sites are totally inadequate, poorly planned and now compromise visitor/pedestrian safety.

Improving the condition and development of public visitor assets is the greatest challenge to be addressed by this plan. It has a direct impact on attracting and satisfying visitor demand, which in turn drives private sector investment in new and existing products and services.

3.1.1 KEY ISSUES

- Planning – There are numerous government agencies involved in the planning and oversight of public land and waterways across the region with differing priorities, objectives and cultures. To overcome costly delays and investment disincentives, a new, more collaborative and innovative approach to achieve timely outcomes is required.
- There is a critical need for essential maintenance works and the development of visitor facilities within the region’s state and national parks, including parks with emerging significance. Park infrastructure is currently significantly under-maintained which is impacting on the visitor experience and length of stay in the region.
- The development of new visitor experiences that will ensure longer stays and provide complementary products, including off peak activities such as events, to attract visitors beyond the summer months.
- The enhancement of existing experiences (low cost option) to optimise visitors’ enjoyment and to potentially increase their length of stay.
- Development and renewal of the range of visitor accommodation, particularly to service demand by high yielding visitors.
- Increased transport options both to and within the region, including growth of air, rail and bus services, and private tour operators.
- The region’s natural attractions are the cornerstone of the visitor economy offering world class experiences but are all free of charge.

3.1.2 STRATEGIC PRIORITIES

The following strategic development priorities respond to the issues and opportunities identified earlier in this Plan in the context of its vision and objectives. They have been informed by previous plans such as the Great Ocean Road Destination Management Plan (February 2012, which included coverage of the Geelong region and had a focus on a small number of large infrastructure projects), the eight Destination Action Plans prepared during the development of the Strategic Master Plan, consultation with stakeholders, and consideration of current, emerging and future market demand.

The priorities of region-wide significance are included below. Each requires scoping and detailed planning, some of which has been completed, is in progress, or needs action. For municipal priorities, please refer to the individual Destination Action Plans.
3.1 DEVELOPMENT CONT.

A. Natural attractions

The base product of the region is its natural assets, both coastal and inland, including the Great Otway National Park, Port Campbell National Park and Lower Glenelg National Park. Marine parks and various state and other parks and reserves are also attractors in their own right. The current condition of national park facilities and infrastructure is sub-standard and is failing to meet the expectations of visitors.

In particular, Port Campbell National Park attracts 2.6 million visitors (including 600,000 international visitors) to the 12 Apostles site annually, but fails to provide an international standard visitor experience. A Strategic Master Plan for the Shipwreck Coast, incorporating the Port Campbell National Park, has been prepared and estimates a total cost of $174 million to implement.

Unless park maintenance and facility development is addressed, increasing length of stay and yield in the region will be increasingly difficult to achieve.

There are a number of regional plans including Great Otway National Park Management Plan, Shipwreck Coast Master Plan and Ngootyoong Gunditj Ngootyoong Mara South West Management Plan which, if fully implemented, would improve the development and maintenance of public land. This would contribute to growing the visitor economy, protecting the environment and facilitating visitor access and experiences. The implementation of these plans requires resourcing, prioritisation and action.

Tower Hill State Game Reserve attracts significant international visitors for its accessible wildlife and Indigenous experience. However, its visitor infrastructure and maintenance is grossly inadequate. It is also open to duck shooting (during restricted hours) for several months a year which has the potential to affect wildlife viewing and visitor safety. The importance of this park is its ability to draw west-bound visitors beyond Warrnambool, potentially adding an extra night to their visit.

Engagement with Traditional Owners is important relative to the planning and implementation of strategic infrastructure and product development throughout the region. Specific Indigenous heritage visitor experience opportunities such as Budj Bim, Tower Hill and Moyjl Point Richie are significant.

Wildlife viewing is a major drawcard for international markets and the region has a number of locations that, if developed, could provide premium viewing of native fauna. A limited number of tour operators conduct wildlife tours in the region, including spot-lighting night tours. Whale watching at Warrnambool and Portland is also a key attractor but is only available seasonally.

The recent announcement of the closure of the Alcoa Coalmine in Anglesea on 31 August 2015 provides a significant opportunity to examine and explore the potential of the large site for future use options that are complementary to the natural environment, generate visitation, create jobs and provide a unique visitor experience. It presents a rare opportunity to explore innovative options for the site.
1. State Government to lead the resourcing and implementation of existing regional plans with a focus on prioritising affordable, achievable actions. Consideration to be given to establishing and resourcing an Implementation Task Group including public sector agencies and GORRT for this purpose.

2. The State Government through its agencies to adequately resource the annual maintenance of visitor amenities and facilities in national parks, waterways, public coastal areas and reserves. Audit and identify priority sites and facilities for urgent maintenance and to address public safety issues.

3. Prepare and implement a Management Plan to upgrade the Tower Hill State Game Reserve as an international standard wildlife reserve with integrated visitor facilities. Consider changing the status of the reserve to allow public/private investment and management of the reserve.

4. Progressively resource the implementation of the Shipwreck Coast Master Plan commencing with identifying and acting on priority strategies. Focus on short and medium term priorities that can commence immediately, are affordable and achievable and can facilitate much needed improvement in visitor management. Priority projects identified by GORRT for early action are:
   a. Relocation and upgrade of the Port Campbell Visitor Information Centre as the primary visitor experience centre for the Port Campbell National Park and trail head for the 12 Apostles Trail.
   b. Upgrade the Port Campbell townscape and visitor amenities.
   c. Improve parking, access and visitor safety at Gibson Steps.
   d. Improve the toilet amenities at the 12 Apostles car park.
   e. Improve the interpretation information at key visitor viewing locations in Port Campbell National Park to encourage visitor dispersal to other key visitor precincts such as Loch Ard Gorge and the Bay of Islands.
   f. Consider implementing user-pays access or a parking fee at the 12 Apostles site. Revenue to be retained and directed to improving the site’s visitor interpretation and facilities.

5. Facilitate the implementation of the Growing Adventure Tourism in the Barwon South West, this focuses on and prioritised the region’s significant walking trails and cycling touring routes.

6. Complete infrastructure requirements for the Great Ocean Walk to attain an international standard walking trail. Ensure trail maintenance is appropriately funded and resourced which is currently not the case.

7. Facilitate the implementation of the Forrest Mountain Bike Strategic Plan.

8. Promote Triplet Falls Walk, with its spectacular waterfalls, giant Mountain Ash and ancient fern gullies, as a major regional rainforest walk.

9. Facilitate better access to Beauchamp and Hopetoun Falls, and the Californian Redwood forest.

10. Facilitate the development of the Lake Condah/Budj Bim National Heritage Landscape project to provide a comprehensive range of Indigenous experiences.
3.1 DEVELOPMENT CONT.

11. Enhance existing wildlife/whale viewing areas with interpretative information and visitor amenities to cater predominantly for international travellers. Premium sites include:
   a. Kennett River (koala/rosellas) – requires supporting infrastructure, such as toilets and parking
   b. Anglesea Golf Course (kangaroos) – tours now available
   c. Apollo Bay (fur seals) – tours available
   d. Forrest (platypus) – canoe tours available
   e. Cape Otway (koala) – open access and managed road infrastructure
   f. Princetown Wildlife Park (all) – privately-managed wildlife park
   g. Port Campbell (mutton bird viewing) – open access and guided tours
   h. Port Campbell (penguins) – limited viewing opportunities
   i. Tower Hill (koala, emu, kangaroo, birdlife) – easy viewing of wildlife
   j. Warrnambool (penguins) – guided tours
   k. Warrnambool (whales) – open access
   l. Port Fairy (mutton birds) – open access
   m. Portland (whales and fur seals) – guided boat trips for seals.

12. Enhance visitor experiences at natural attractions, public land and waterways through the development of appropriate visitor services, e.g., innovative interpretative tours and information including Indigenous experiences, low impact accommodation, viewing platforms, kiosks and event spaces.

13. Encourage the development and consideration of bold and innovative options at the Anglesea site vacated by Alcoa which can increase the contribution of the visitor economy as well as environmental and social outcomes.
3.1 DEVELOPMENT CONT.

B. Touring
The Great Ocean Road is heritage listed and an iconic touring route of international significance. Scenic touring along the Great Ocean Road is one of the region’s most popular visitor activities. Improvements to the road are required to address ageing infrastructure and the impact of growing visitation pressures in order to support visitor safety and enhance the visitor experience. (See section 3.3.3, Infrastructure and visitation management for relevant actions).

C. Accommodation
The region requires additional accommodation to meet visitor demand including 4 to 5 Star standard integrated resort and boutique styles, located in hinterland and/or coastal locations within easy range of major nature based attractions and experiences. Much of the region’s existing accommodation requires upgrading, redevelopment and/or refurbishment to meet the expectations of higher yielding target markets. Victoria is the only state in Australia that does not have a luxury lodge, whereas neighbouring competitors (Tasmania and South Australia) have excelled in attracting upmarket eco-lodge style accommodation.

**ACTIONS**

14. Facilitate the attraction of investment in the development of high standard accommodation on appropriately pre-zoned private land, including integrated resort style, wilderness and wellness retreats, complemented by high yielding nature based and indulgent experiences.

15. Undertake an audit and review of existing accommodation stock and provide guidelines on redevelopment and refurbishment options.

16. Encourage and support existing owners of accommodation to upgrade, refurbish and develop new infrastructure to meet visitor demand.
3.1 DEVELOPMENT CONT.

D. Built attractions

The key attractions in the region are predominantly associated with its natural assets. However, both the Australian National Surfing Museum in Torquay, and Flagstaff Hill Maritime Village in Warrnambool, are major local government-managed attractions which are based on the local area’s historical attributes. The Australian National Surfing Museum tells the story of Australia’s significant surfing history and the new Great Ocean Road Heritage Centre at Lorne VIC tells the story of the building of the Great Ocean Road. Flagstaff Hill Maritime Village tells the story of the area’s rich maritime history.

Similarly, other privately developed and managed attractions require continuous investment to respond to market demand, e.g. Cape Otway Light Station, Otway Fly.

E. Investment attraction

There are numerous government agencies involved in the planning and oversight of public land across the region, many of whom have differing priorities. In order to assist and encourage investment in much needed infrastructure, better public sector coordination and cooperation is essential. Victoria’s ability to attract private investment in tourism infrastructure has lagged behind other states, and requires a more collaborative and coordinated approach.

Councils have a responsibility and role to attract and facilitate investment for their municipality.

GORRT Ltd has a potentially valuable role to play in facilitating investment attraction, and project planning and implementation for the region in collaboration with the three levels of government.

ACTIONs

17. Encourage investment to reinvigorate the key attractions within the region including Flagstaff Hill Maritime Village and the Australian National Surfing Museum.

18. Attract investment in new built attractions to meet market demand, which are consistent with the attributes of the region and its destinations, e.g. geothermal spas and wellness centres, nature based learning centres.

19. Support attractions operators to upgrade/refresh their products and services.

20. Establish and resource an Investment Attraction and Major Project Implementation Task Group under the auspices of GORRT Ltd.

21. Develop an innovative model to facilitate public-private partnership investments in major projects, such as accommodation and related services that are complemented by visitor facilities at public sites.

22. Work with all tiers of government to facilitate private sector investment. Priority actions to include:

   a. Identification of appropriate public and/or private land.
   b. Advocate for establishment of commercially favourable lease terms for public land based attractions and services to encourage investment to enhance visitor experiences (e.g. Cape Otway Light Station).
   c. Encourage LGAs to develop pre-approval of recommended types of investment.
   d. Encourage and advocate for government support activity to incentivise investment i.e. land rezoning and planning approvals, low interest loan schemes, marketing support.
3.1 DEVELOPMENT CONT.

F. Beachside infrastructure

The region’s numerous and stunning beaches are major attractions, which in summer attract significant visitation, particularly day trips to locations easily accessible from Melbourne, Geelong and Ballarat. The population growth west of Geelong will increase the pressure on these beaches and create additional challenges for existing infrastructure to meet demand for usage, particularly parking and toilets. Maintaining good access, facilities and infrastructure will require continued development and investment.

Car parking during summer is totally inadequate in the coastal ‘villages’ of Torquay, Anglesea, Lorne and Apollo Bay.

An integrated strategic approach to planning and management by coastal committees and local government agencies taking into account community and visitor needs will be essential.

ACTION

23. Ensure an integrated, collaborative approach to coastal management planning for the provision of amenities, facilities and services to meet the expected increase in visitor demand, including car parking at popular beach locations. (See also section 3.3.3, Infrastructure and visitation management).

G. Eating out

The availability of quality regional food and beverage experiences has become very competitive in Australia, to the extent that it is now a standard expectation of visitors, particularly higher yielding target markets. With some exceptions, the most notable being Brae which is ranked in the top 100 restaurants in the world, the region generally lags behind other destinations in the range, quality and standard of its food and beverage offerings. Visitors to the region expect to find accessible, high quality seafood dining experiences, and a suite of restaurants that feature local produce on their menus. In reality, the options are very limited due to the micro nature of the region’s producers and a lack of cost-effective distribution channels.

In addition, high seasonal demand at the region’s primary destinations complicates (or creates inconsistencies in) the delivery of the food and beverage offerings. There are also difficulties in attracting and retaining qualified and/or experienced staff during peak periods, and an associated struggle to provide affordable accommodation for seasonal staff close to major tourism destinations such as Lorne.

In off-peak periods, the level of trade generally cannot sustain a destination’s full food and beverage offering, and a lack of coordination amongst businesses can result in times of year/week when there are very limited dining choices.

ACTION

24. Prepare a region-wide Food, Wine and Beverage Audit and Development Plan to guide the development of competitively differentiated signature experiences, supported by local and regional produce, trails, experiences and seasonal menus. It should also consider the cultural requirements of international visitors to the region.
3.1 DEVELOPMENT CONT.

H. Events

The region boasts several events of international, national and state significance, such as the Rip Curl Pro Bells Beach, Cadel Evans Great Ocean Road Race, Great Ocean Road Marathon, Port Fairy Folk Festival, The Falls Festival, the Gran Fondo, the Warrnambool May Racing Carnival and the Fun4Kids Festival. It also has an extensive calendar of local and community focussed events. These quality events provide a catalyst for increased length of stay and repeat visitation. Options should be explored to leverage existing events or stimulate new events in off-peak periods.

Primary tourist destinations are also often highly appealing for business events and conference locations, provided that suitable venues are available. Both Lorne and Torquay have resort style venues (five) that can accommodate large conferences. They are also within the desired two hours’ travel time from Melbourne and the Melbourne Airport. Warrnambool is centrally located within the Western District and has a number of suitable conference venues, as well as accommodation capacity to support regional conferencing.

**ACTIONS**

25. Develop a Regional Events Strategy to ensure a collaborative and coordinated approach to growing and leveraging the regions tourism events. The strategy to consider development of an event hierarchy to differentiate events and the role they play within the tourism landscape. Priority should be given to developing and supporting both current and new events outside the peak summer period when accommodation, etc., are already beyond capacity.

26. Develop a Business Events and Conferencing Plan that identifies opportunities to expand the sector, giving consideration to supporting activities, venue capacity, support services and marketing directions.
3.1 DEVELOPMENT CONT.

I. Outdoor active tourism

The region’s rich natural assets provides a perfect setting for outdoor based activities; from the passive to the adventurous and even elite competition. Forrest has been positioned as one of Victoria’s key mountain biking centres, with some 60 kilometres of constructed trails, and attracts the country’s top riders. Without investment in adequate trails and infrastructure, Forrest may lose market share to competitor destinations. Events are also conducted at Forrest, however accommodation and services are somewhat limited but expanding to meet market demand.

The region also boasts excellent golf courses, many of which have the added attraction of being located adjacent to spectacular coastline.

The surfing industry is a key contributor to the visitor economy, especially in Torquay which is home to world renown surf breaks, significant surf events and Surf City. Further exploration of opportunities for enhancement and development of the surfing experience is required to maintain and grow Torquay as a significant surfing destination.

Anglesea has seen growth in outdoor active products and experiences. Further opportunities to grow the outdoor active product should be explored especially given the early departure of Alcoa. Both saltwater and fresh water fishing is an important economic generator for a number of locations in the region, including Apollo Bay, Warrnambool, Port Fairy, Portland and Camperdown. The recreational tuna fishery along the West Coast is very lucrative for local townships, with the fishery at Portland estimated to be worth $7 million per annum. Inland lakes near townships such as Camperdown and Lismore are also an important contributor to local tourism activity.

ACTION

27. Using the framework established in the Growing Adventure tourism in the Barwon South West region extend product considerations to include a broader range of outdoor active experiences which add value to existing nature based experiences and encourage visitors to extend their length of stay and immerse themselves in the region.

28. Enhance Torquay’s standing as a significant destination.
3.1 DEVELOPMENT CONT.

J. Accessible tourism
The region needs to prepare for the changing needs of an ageing population and an increasing percentage of the market with some form of disability (currently 18.5% of the Australian population). Catering for disabilities is a priority for the development of new and existing products and services along with raising the general awareness of these needs. Opportunities should be communicated to the tourism industry through visitor servicing programs.

ACTION

29. Encourage accommodation and service providers to invest in and promote accessible tourism facilities.

K. Major local opportunities
Part 4 provides a detailed summary of the opportunities identified in each of the Destination Action Plans. However a number of those opportunities will have a major (regional) influence on increasing length of stay. They include:

- Torquay – development of Surf City (preliminary planning underway)
- Lorne – Point Grey precinct redevelopment (planning underway)
- Apollo Bay – harbour development (planning underway)
- Apollo Bay – significant parcels of land in Collingwood Street and other central locations could play a role in addressing the shortage of 4 and 5 star accommodation.
- Apollo Bay – development of a conference facility
- Port Fairy – harbour development (planning commenced)
- Warrnambool – Flagstaff Hill redevelopment
- Portland – harbour development.
3.1 DEVELOPMENT CONT.

L. Colac, Warrnambool and Portland

Colac, Warrnambool and Portland are significant cities for the region and provide a range of retail, hospitality and accommodation services to visitors. These cities are hubs for their surrounding districts so investment in visitor infrastructure, events and facilities at these locations adds to opportunities for increased dispersal and expenditure in adjacent areas. Therefore, economic and strategic planning for the region’s cities should incorporate visitor economy planning for the broader district.

The port of Portland has started to attract cruise ships. This provides a new market for the region and a new entry point for visitors.

ACTIONS

30. Encourage local councils to incorporate holistic planning for the visitor economy in their strategic plans for Colac, Warrnambool and Portland.
31. Review or prepare Tourism Destination Plans for Colac, Warrnambool and Portland as input to city planning.
32. Facilitate the development of products and services to support the cruise market. Invest in accessible tourism facilities.

M. Geelong and The Bellarine

Geelong and the Bellarine are located near primary entry points to the Great Ocean Road region and provide complementary attractions, facilities and services for visitors. A separate but aligned strategic planning process has been undertaken by the Tourism Greater Geelong and The Bellarine (TGGB) tourism organisation and should be considered in conjunction with this plan.

Cooperation between GORRT Ltd and TGGB, where appropriate will be valuable to facilitate the development, marketing and management of their respective visitor economies.

ACTION

33. Work with TGGB to facilitate the implementation of projects that are mutually advantageous for the respective regions such as:
   a. Avalon Airport development
   b. Geelong Convention centre
   c. Geelong Cultural precinct
   d. Searoad Ferries port infrastructure.
3.2 MARKETING

3.2.1 Overview

As previously noted, the Great Ocean Road region receives the highest visitation of any Victorian region outside of Melbourne. With strong visitation, yet poor yield, the focus from a marketing perspective is not on growing absolute visitor numbers, but on managing and optimising existing visitation to increase yield, length of stay, seasonal dispersal, geographical dispersal, and enhancing the visitor experience to lead to increased satisfaction.

The marketing strategy aims to provide a framework to strengthen and empower all stakeholders in the industry to contribute towards a unified approach to the marketing of the region. It seeks to capitalise on the success of the region’s past and to position the region and its destinations to attract those key growth markets focused on personal, environmental and community wellbeing.

This strategy is suggesting a fresh approach to the marketing of the region. In many respects it is a back-to-basics approach to reposition the region to drive current opportunities. It identifies that a foundation strategy is rebranding, that is, shifting the positioning of the region from a passive, visually spectacular destination to one that encourages the visitor to become immersed in the region’s authentic, engaging and enriching experiences.

It proposes, as a priority, a strategic emphasis on product development and enhancement, and elevates to critical, the delivery of seamless, exceptional visitor services to augment the region’s signature and iconic natural attractions. It seeks to reposition the region to offer visitors a deeper connection to the people, places, stories and personality of the region and its destinations.

3.2.2 Key issues

- **Poor yield, dispersal and length of stay** – more than 50% of visitation to the region occurs as day trips. This emphasis on day trips, coupled with the primary visitor activities of going to the beach and general sightseeing, has resulted in poor yield for the region, and a disproportionate level of coastal visitation versus to the hinterland and beyond the Great Ocean Road.

- The absence of a regional body over the past five years has negatively impacted on visitation yield. Total real tourism spending to the Great Ocean Road region was flat, 0% change (2009 to 2014 year), in comparison to average growth in regional Victoria of 8%, and growth in Melbourne of 16%. Reinforcing the conclusion that the GOR region missed growth opportunities due to a lack of strategic leadership.

- **Visitor dissatisfaction such as crowding at key visitor nodes** – in peak periods, high visitation to key destinations such as Torquay, Lorne and Apollo Bay, and primary attractions such as the Great Ocean Road Memorial Arch, Gibson Steps and the 12 Apostles, exceeds the capacity of facilities, businesses and services to efficiently manage or service demand. This negatively impacts on the quality of the visitor experience, diminishes opportunities to grow yield and encourage longer length of stay, and provides a significant risk to reputation management.
3.2 MARKETING CONT.

- Lack of knowledge of the breadth and depth of product offering – research highlights that visitors’ knowledge of the region is often quite narrow and at times nostalgic. It is critical to focus on increasing visitors’ knowledge of the region’s product and experiences at the point of trip planning to support a shift from intent to take a day trip to planning for an extended stay.

- Poor digital presence and participation – The region has a fragmented digital presence with low levels of operator participation and limited online booking capability. Critical to improving length of stay and yield is increasing the breadth, depth and consistency of information available digitally. Enhancing the destination sell within booking/conversion sites and tools is critical to changing consumer perceptions during the planning phase of the consumer trip cycle, increasing opportunities for conversion. The growth of mobile ‘web’ usage in region also requires an increased emphasis on the provision of timely, accurate and relevant online content, and growing participation from relevant products and services that are only selected in region.

- Product offering in low season – to build off-peak visitation, it is critical to focus on extending and enhancing seasonal product offerings. Key destinations do not have sufficient product open and operating in non-peak periods which is attuned to the specific season, with the exception of Port Fairy.

- Lack of industry-funded co-operative marketing – the strength of current visitation, especially in key destinations, and the absence of a regional body for the past 5 years, has reduced the industry’s contribution to the marketing of the region and/or destinations. The capacity to undertake marketing and promotions, critical to changing consumer perceptions and behaviour is growing the number of operators financially investing in marketing, and the level at which they invest.
3.2 MARKETING CONT.

3.2.3 Product

The Great Ocean Road region is renowned primarily for its spectacular natural attractions, including the scenery along the road itself, the coast and its beaches, the hinterland and native Australian wildlife. Secondary strengths include the region’s history and heritage, events, arts and culture.

Emerging product strengths include wellness and activity based experiences that allow visitors to immerse themselves in nature, such as walking, mountain biking, cycling, surfing, kayaking, etc.

Locally produced food and beverages are also emerging as a product strength, and there is a growing range of gourmet produce, boutique wineries and breweries, and cafes and eateries.

Product enhancement and development priorities discussed in the ‘Development’ section of this Plan should be aligned with the product preferences of the region’s high value target markets, and support the positioning of key destinations and visitor nodes.

Critical to a strategy that is aiming for incremental growth in yield and length of stay is activity and experience based product development, especially non-season/weather dependent product available year-round.
### 3.2 MARKETING CONT.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>STATUS</th>
<th>STRENGTHS</th>
<th>STRATEGIC ISSUES</th>
</tr>
</thead>
</table>
| Natural attractions| Current| Scenery along the Great Ocean Road and throughout the region’s hinterland Parks and reserves  
- Port Campbell National Park  
- Great Otway National Park  
- Cape Bridgewater/Discovery Bay Coastal Park  
- Lower Glenelg National Park  
- Marine National Parks  
- Tower Hill State Game Reserve  
- Cape Otway  
- Anglesea Heath  
- Others  
Lakes and rivers  
Beaches  
Waterfalls  
Volcanic landscape  
Bells Beach  
Teddy’s Lookout | Visitor management/quality of facilities  
Lack of interpretation  
Access at peak periods  
Lack of accommodation linked to natural attractions, e.g. wilderness retreats  
Day visitor facilities  
Mobile/broadband access |
| Walks              | Current| Great Ocean Walk  
Surf Coast Walk  
Great South West Walk | Trail infrastructure  
Lack of priorities for trail and cycle tourism investment  
Lack of coordination for trail and cycle tourism development  
Limited marketing effort resulting in inefficiency  
Low yield from visitors and minimal revenue return for reinvestment to improve offering  
Limited investment in accommodation, transport, guided experiences and service offerings to support trails. The Growing Adventure Tourism in the Barwon South West Region has identified strategies to address these issues. |
| Wildlife           | Current|  
- Koalas at Kennett River and Cape Otway  
- Koalas, kangaroos, wallabies and emus at Tower Hill  
- Whales and seals at Warrnambool, Portland, Apollo Bay and Lorne  
- Platypus at Lake Elizabeth | Formal infrastructure and facilities at wildlife viewing points.  
Access to whale watching/tours. |
<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>STATUS</th>
<th>STRENGTHS</th>
<th>STRATEGIC ISSUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Current</td>
<td>Calendar of significant events</td>
<td>▪ Lack of events in low season</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Rip Curl Pro</td>
<td>▪ Need for strategic regional coordination in the development, siting, and</td>
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<tr>
<td></td>
<td></td>
<td>▪ GOR Marathon</td>
<td>scheduling of events to increase overall visitation</td>
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<td></td>
<td></td>
<td>▪ May Racing Carnival</td>
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<td></td>
<td></td>
<td>▪ Fun 4 Kids Festival</td>
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<td></td>
<td></td>
<td>▪ Port Fairy Folk Festival</td>
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<td></td>
<td></td>
<td>▪ Apollo Bay seafood Festival</td>
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<td></td>
<td></td>
<td>▪ Gran Fondo and Cadel Evans road races</td>
<td></td>
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<td></td>
<td></td>
<td>Music festivals</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Recreation/sports events</td>
<td></td>
</tr>
<tr>
<td>History and heritage</td>
<td>Current</td>
<td>Surfing history – Australian National Surfing Museum</td>
<td>▪ Lack of in-situ interpretation</td>
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<td></td>
<td></td>
<td>Maritime/Shipwreck history, including Flagstaff Hill</td>
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<td></td>
<td></td>
<td>Maritime Village and light stations</td>
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<td></td>
<td></td>
<td>Great Ocean Road Memorial Arch</td>
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<td></td>
<td></td>
<td>Great Ocean Road Story Exhibition at the Lorne VIC.</td>
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<tr>
<td>Outdoor active</td>
<td>Emerging</td>
<td>Cycling/Sporting Events</td>
<td>▪ Maintenance &amp; development of support infrastructure</td>
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<tr>
<td></td>
<td></td>
<td>▪ Mountain Bike Trails – Forrest, Anglesea</td>
<td>▪ Promotion of trails including development of signage</td>
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<tr>
<td></td>
<td></td>
<td>▪ Rail Trails Beechy, proposed 12 Apostles Trail</td>
<td>▪ Implementation of the Forrest Mountain Bike Strategic Plan</td>
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<tr>
<td></td>
<td></td>
<td>▪ Surfing</td>
<td></td>
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<td></td>
<td></td>
<td>▪ Fishing</td>
<td></td>
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<tr>
<td>Regional produce</td>
<td>Emerging</td>
<td>12 Apostles Gourmet Trail</td>
<td>▪ Seasonality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Otway Harvest Trail</td>
<td>▪ Integration through experiences, i.e. access in cafes/restaurants</td>
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<td></td>
<td></td>
<td>Gourmet Port Fairy</td>
<td>▪ Access to regional seafood</td>
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<td></td>
<td></td>
<td>Icon restaurants, i.e. Brae, Chris’s</td>
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<td></td>
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<td>Farmers Place, Torquay Wholefoods</td>
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<td></td>
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<td>Emerging slow food, breweries &amp; coffee roasters</td>
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<tr>
<td>Arts and Culture</td>
<td>Emerging</td>
<td>Lorne – Qdos, Performing Arts Festival, Lorne Sculpure Biennale</td>
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<tr>
<td></td>
<td></td>
<td>Port Fairy events and activities</td>
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<td></td>
<td></td>
<td>Aireys Inlet events and activities</td>
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<tr>
<td>Indigenous</td>
<td>Current</td>
<td>Cultural tours at Tower Hill</td>
<td>▪ Facilities and interpretive services</td>
</tr>
<tr>
<td></td>
<td>Emerging</td>
<td>Budj Bim National Heritage Landscape</td>
<td>▪ Further opportunities to access/ experience Indigenous cultures.</td>
</tr>
</tbody>
</table>
3.2 MARKETING CONT.

### 3.2.4 Brand

GORRT Ltd, in partnership with Tourism Victoria, has commenced a review of the region’s brand. To align with a greater emphasis on destinations, and to reflect the differentiation in their products and experiences, this process has included a review of the positioning and signature experiences of key destinations. The brand review process will provide guidance for product and experience development priorities for each destination over the next three to five years.

The refreshed brand is intended to shift consumer perceptions of the region as a passive, visually spectacular destination for sightseeing and photography, to a perception of the region as embracing an individual’s desire to connect and immerse in nature. It aims to create a shift from viewing the region as passive, to active, or in some cases adventurous.

The greatest challenge for the region from a brand perspective is influencing and facilitating changes to messaging by the broader stakeholder groups promoting the Great Ocean Road, along the entire travel industry supply chain. This will need to be a key priority.

### 3.2.5 Price

The region’s focus on yield generation requires an increased emphasis on developing ‘value’ for the visitor. The price of accommodation, attractions and services needs to be competitive with other destinations and reflect the quality of the product offering. Visitors benchmark quality against price and compare the region with the quality and price of experiences found elsewhere, both nationally and internationally.

### 3.2.6 Promotion

With a key objective of the Plan being to increase length of stay and yield, promotional strategies will not be focused on attracting greater numbers of visitors. This is a significant shift from the traditional regional tourism strategies. Rather, the objective is to re-align the region to its target markets and to increase their knowledge of the breadth and depth of experiences available.

The promotional approach is outlined in Section 3.2.8, Strategic Marketing Plan.

### 3.2.7 Distribution

The region must embrace both traditional and emerging distribution channels and build consistency in messaging. Traditional print mediums will continue to assist in building visitors’ knowledge of the breadth and depth of product in journey, and to facilitate operators playing a more overt role in information dissemination.

A new digital platform will provide a foundation tool for growing the region’s digital footprint and will provide a catalyst for building the capability and presence of industry. The region will seek to optimise a word-of-mouth strategy which will see an increased emphasis on social media.

At the core of the region’s distribution strategy will be a focus on evolving visitor information services, including the progression of visitor information centres to visitor servicing hubs. The hubs will provide a more commercially focused service, and will aim to orient, inform and drive take-up of visitor experiences.
3.2 MARKETING CONT.

3.2.8 Strategic Marketing Plan

To deliver a fresh approach to the marketing of the region and to address the challenges and priorities identified above, it is critical that the region instigates change. Sustainable change will only be achieved by building strategically from the ground up. To achieve this, a three-stage Strategic Plan is proposed:

Stage 1
Establish the foundations and build the framework for a collaborative approach to marketing (2014-2017);

Stage 2
Implement a holistic Strategic Marketing Plan (from product development through to distribution) (2015-2018);

Stage 3
Review results and replan (2018 onwards).

### Stage 1 The foundations and framework

<table>
<thead>
<tr>
<th>ACTIONS</th>
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<tbody>
<tr>
<td>34. Develop the brand positioning for the region and its destinations.</td>
</tr>
<tr>
<td>35. Build an industry engagement program to create a culture of connectedness and trust.</td>
</tr>
<tr>
<td>36. Partner with local tourism organisations to facilitate a cohesive approach to marketing, management and visitor servicing.</td>
</tr>
<tr>
<td>37. Identify primary visitor nodes and develop strategic ‘destinations’ focused marketing plans to underpin the region’s key experiences. Initial focus to be centred on the growth opportunities and yield from the intrastate market, especially Melbourne. This more strategic focus aims to refresh the market’s existing knowledge base, leverage the sometimes nostalgic ties to specific destinations, and to convert day trips into overnight stays.</td>
</tr>
<tr>
<td>38. Facilitate cooperative buy-in campaigns in association with destination partners, where campaigns are strategically aligned.</td>
</tr>
<tr>
<td>39. Undertake a price comparative study for the region.</td>
</tr>
</tbody>
</table>

This stage will be supported by strategies outlined in sections 3.3.4, Visitor Services, and 3.3.7, Industry Participation and Leadership, aimed at building industry capacity, participation and delivery capability.
3.2 MARKETING CONT.

Stage 2 Implement strategic marketing plans (2015-2018)

**ACTIONS**

40. To ensure an evidence-based, research driven approach to marketing and promotional activities, attain or commission research to monitor visitor activity in the region.

41. Prepare and implement strategic marketing plans (annual and three years) for intrastate, interstate and international markets incorporating the following:
   a. Maximise existing visitors to position the region and its experiences to encourage increased length of stay – one more attraction, one more meal, one more experience, one more destination, one more night.
   b. Encourage touring to increase visitor dispersal and link inland destinations through a product and/or experience focus.
   c. Facilitate an integrated content-driven approach to promoting the region, and optimise print and digital distribution channels as well as key visitor touch points to maximise the dissemination of information.
   d. Build visitors’ connectedness and relationship with the region by focussing on the stories that shape it including:
      i. The people - discovering and sharing their passion and knowledge of history, place and lifestyle.
      ii. The land - exploring its particular colour, character, climate, whether it be coastal or hinterland, discovering what this land produces and learning about its ancient past.
      iii. The creativity - finding out about the artists and makers of beautiful things, and discovering their inspiration.
   e. Engage with the consumer throughout the entire trip cycle, with increased emphasis on the ‘planning’ phase to educate on the breadth and depth of product, and the ‘do’ phase to increase in-region knowledge of how to experience the region. This will increase satisfaction, maximise opportunities for dispersal and improve visitor experience.
   f. Focus promotional actions on targeted niche activities that attracts higher value visitors, and builds visitation during non-peak periods (mid-week, winter, etc.)

42. Partner with Tourism Victoria (Visit Victoria), where appropriate, to leverage state based promotions and campaigns.

43. Work in partnership with Parks Victoria to promote appropriate nature based tourism in National and State parks.

44. Develop strategic partnerships with signature events, or key products or groups of products and services, to leverage existing visitation – to increase length of stay, dispersal or initiate repeat visitation.

This stage should aim to reposition the region to drive yield and ensure the long term viability of the visitor economy. It will be supported by initiatives that encourage the development of product and experiences to complement region/destination positioning in order to meet the needs of changing, higher value, target markets (See section 2.4). It will also be supported by activities that aim to improve visitor satisfaction through the provision of world class visitor service (See Section 3.3.4).

Stage 3 Review and replan (2018 onwards)

This stage will also be supported by efforts to drive improvements in product and service delivery.

**ACTIONS**

45. Review, monitor and refine activities based on direct evidence, including consumer responsiveness and behaviour.

46. Commence a review of the Strategic Marketing Plan and develop a new Strategic Plan.
### 3.3 MANAGEMENT

Management in a regional and destination context refers to managing the impacts of visitation, industry organisational management and industry professional development.

The strategic issues and strategies related to management of tourism in the region have generally been referenced earlier in the plan. They have been identified through the destination action planning process, as well as stakeholder consultations.

#### 3.3.1 Key issues

A brief summary of management issues includes:

- Managing the visitor impact on small, local, coastal communities
- Inability of governments to fund and maintain key public infrastructure
- Conflicting priorities of government agencies/asset managers
- High variability in the quality of visitor servicing
- Creating a visitor servicing model for the future – meeting the needs of the new ‘digital’ traveller, and facilitating the evolution of ‘bricks and mortar’ visitor information centres
- Community engagement and increasing understanding of the value of the visitor economy
- Providing professional development opportunities for industry
- Ensuring the Long-term sustainability of the regional funding model
- Seasonal employment availability/training/accommodation
- Collaboration between operators both within a destination and whole of region
- Profitless volume from day tour market (coaches) and their high impact at key sites
- Challenges of the growing market of ‘free’ campers particularly the degradation of public land
- Workforce development and attraction
- Balancing the desire for lifestyle businesses with visitor needs and expectations, e.g. regular operating hours and year-round availability
- Advocating tourism as a key industry sector to address youth unemployment.
3.3 MANAGEMENT CONT.  

3.3.2 Community engagement

Tourism generally has a positive social, cultural and economic impact on local communities. It provides for additional infrastructure and services in small townships that would otherwise not be possible or sustainable without visitors. However, there are also negative impacts, particularly in peak periods where local infrastructure is inadequate and fails to keep up with growth in both residential populations and visitors.

The impact of increasingly large visitor numbers on small communities along the Great Ocean Road is of major concern and requires a new approach to address the problem.

The tourism sector has mostly failed to engage local communities in key decision making regardless of the potential impact on the liveability of their town. This situation has gone unabated for many years with some communities now seeing tourism as a threat to their way of life. The reasons they chose to reside in these coastal ‘villages’ are now being eroded.

This issue was identified in the destination action planning process by community representatives and requires a strategic response.

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<table>
<thead>
<tr>
<th>ACTIONS</th>
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<tbody>
<tr>
<td>47. At the destination level, engage with local communities and local government to identify visitor impact issues and develop a range of strategic initiatives in response.</td>
</tr>
<tr>
<td>48. Develop and implement a regional and local communications strategy to inform residents about the contribution of the visitor economy to local jobs and services. This strategy should particularly incorporate the link between many part time or casual jobs making possible the higher paid full-time and professional jobs that come with a critical local economic mass.</td>
</tr>
<tr>
<td>49. Continue to involve community representatives in the development and implementation of Destination Action Plans.</td>
</tr>
</tbody>
</table>
3.3 MANAGEMENT CONT.

3.3.3 Infrastructure and visitation management

The Great Ocean Road is heritage listed and an iconic touring route of international significance. While Federal and State Governments have committed $50 million over the five years from 2014 to 2019 to address neglected maintenance of the road, it requires an estimated $20 million every year thereafter to maintain the required standard for its national heritage status. Increased funding to the Great Ocean Road and inland feeder routes is essential to facilitate improved traffic management, traveller safety and to ensure the experience is world class.

The majority of the Great Ocean Road’s key infrastructure was developed many decades ago when visitor numbers were comparatively low and it has since failed to keep up with both residential and visitor growth.

The majority of visitation to the region is from the intrastate market, primarily from Melbourne and Geelong. Visitation pressure is increasing particularly from the nearby population growth areas west of Melbourne and Geelong. The Surf Coast is the primary destination for recreational day trip visits, resulting in mass visitation during summer and public holiday periods, particularly on good beach days. The large visitor numbers and poor infrastructure cause traffic congestion on the Great Ocean Road, as well as parking and access pressures at surf coast beaches and adjoining foreshores. Increased coach traffic is causing parking issues at both Anglesea and Apollo Bay for the whole of the year, not just the summer months. While there is evidence that the self-drive market is growing as fast as or faster than the coach market, this presents equal challenges as more visitors arrive in even more vehicles.

Similarly, high visitation to the 12 Apostles, combined with grossly inadequate facilities and visitor services, is resulting in a sub-standard experience at what is one of Australia’s flagship destinations, particularly for international visitors.

These pressures are also experienced at wayside stops along the Great Ocean Road, especially by independent travellers and coach tour visitors (e.g. Anglesea, the Archway at Moggs Creek, Kennett River and Apollo Bay).

The growth of roadside vegetation along the Great Ocean Road, much of which is non-Indigenous as a result of past bushfires, has in many cases denied travellers of ocean views. This issue requires ongoing maintenance.

The majority of roadside pullovers were created decades ago and can no longer accommodate safe parking for travellers seeking a photograph or a short walk. Many are poorly maintained and inappropriately located requiring an audit of capacity, need and safety.

The numerous government agencies involved in coastal and foreshore management further exacerbate the problem of inadequate infrastructure due to a lack of co-ordination and conflicting priorities. There is no single agency that determines or funds overall priorities so gaps and inconsistencies in key infrastructure remain. This outcome is most unsatisfactory for one of Australia’s primary tourist destinations.
3.3 MANAGEMENT CONT.

To reinforce the region’s status as an iconic touring destination, and to generate greater yield and dispersal, a holistic approach to signage is required. This involves the development of consistent and integrated signing, including way-finding and interpretive information, and safety signing throughout the region, particularly along the Great Ocean Road. This is critical to encourage safe driving behaviour (such as driving on the left side of the road), as well as encouraging visitor dispersal from the coast to hinterland areas. Signing should take into account new digital technology and opportunities to interact and engage with visitors during their visit.

**ACTIONS**

50. Develop and implement a Management Plan for the heritage-listed Great Ocean Road to maintain its standard as a world-class touring route. This Management Plan is a requirement of the heritage listing.

51. Mitigate traffic congestion along the Great Ocean Road through appropriate road works and infrastructure, e.g. Anglesea roundabout and road crossing; additional overtaking/slow vehicle lanes along the road between Torquay and Apollo Bay.

52. Establish and implement an integrated and consistent world-class road signage strategy throughout the region, to be implemented by state and local governments. Priority to be given to signing of the Great Ocean Road. This signage strategy needs to be integrated with VicRoads and local government ‘feeder roads’.

53. Manage the growth of roadside vegetation (much of which is non-Indigenous) to maintain ocean views.

54. Prepare an audit of roadside pullovers, and identify current and anticipated usage requirements. Identify suitable management strategies, including sites requiring additional pullovers, and identify appropriate maintenance regimes. The majority of roadside pullovers including icon pull-overs such as Mt Defiance, Cape Paton, Beacon Point, Cape Otway Road, Barwon Dam and Castle Cove were created decades ago and can no longer accommodate safe parking for travellers seeking a photograph or short walk.

55. Address the visitor management and safety issues at the Great Ocean Road Archway at Moggs Creek.

56. Develop solutions to manage coach parking especially in Apollo Bay and Anglesea, and at Gibson Steps and the 12 Apostles. (Shipwreck Coast Master Plan identifies strategies for consideration)

57. Provide appropriate infrastructure and amenities at Lake Elizabeth.
3.3 MANAGEMENT CONT.

3.3.4 Visitor services

Visitor satisfaction – The level of visitor services throughout the region is highly variable and needs to respond to the differing requirements of both domestic and international markets. Excellence in customer service, leads to increased yield, repeat visitation and positive word-of-mouth referrals.

Research undertaken by GORRT Ltd has identified some visitor dissatisfaction with service standards and a lack of amenities, resulting in experiences that do not meet visitor expectations. Past mystery shopper research has also confirmed this weakness. All Destination Action Plans identified visitor service standards and consistency as an issue requiring close attention.

Visitors to the region have high expectations and the region’s target markets are experienced travellers who compare the region with other global destinations they have visited.

While visitor servicing is a key issue for the region, it is also an opportunity to create a culture of ‘service excellence’ as a competitive advantage to match the outstanding natural appeal of the region.

ACTIONS

58. Develop visitor service standards for operators to provide for greater consistency

59. Continue research to benchmark, measure and report on visitor satisfaction performance.

60. Highlight those businesses and individuals that excel in service delivery in marketing and general communications.

61. Develop a Visitor Experience Excellence program for implementation at a local destination and business level, drawing on Victoria’s Tourism Excellence program, the principles of ‘conscious travel’ and best practice service delivery.

62. Facilitate opportunities to foster and develop programs on cultural awareness and tolerance to strengthen excellence in customer service to international visitors and Australians of various ethnic backgrounds.
3.3 MANAGEMENT CONT.

Visitor Information – Digital technology offers both existing and potential visitors instant access to information, choice and referral. To optimise opportunities of digital platform usage, GORRT Ltd has implemented Wi-Fi hotspots in several high visitation locations throughout the region. However, the region has low levels of on-line presence by tourism businesses, and pockets of the region have little or no digital access which is a competitive impediment.

The region has eight accredited Visitor Information Centres funded and operated by local governments, with the centres of Lorne and Apollo Bay ranked as the second and third most visited centres in Victoria after Melbourne’s Federation Square. Local and international research indicates that strategically located visitor centres can influence visitors’ length of stay and local spend. For some markets, they offer a source of localised information that is not available digitally, or which complements or re-affirms the information available digitally.

ACTIONS

63. Investigate the feasibility of creating a new model for the function and operation of visitor servicing. Include consideration of the development of visitor hubs at key precincts or gateways, potentially involving commercial attractions/service centres for both the destination and the region. The visitor hubs could provide a point of orientation and information, and facilitate access to and purchase of merchandise (local/regional art, craft and produce), booking services, tour operators, activities/attractions, trail heads, event services and business centre services.

64. Implement an integrated regional and destination digital, collateral and face-to-face system for the provision of visitor information.

65. Develop and implement a program to encourage and support businesses to have a greater on-line presence.

66. Develop, implement and continuously improve a contemporary best practice web site for the region and its destinations featuring local content management.

67. Given the rapid changes with digital information platforms, continue to review future visitor servicing requirements.
3.3 MANAGEMENT CONT.

3.3.5 Local Tourism Organisations

As identified in the diagnostic review of the ‘Success Factors of Regional Tourism’ and identified in the Destination Action Plans, the capacity building of local tourism organisations is a strategic priority.

These organisations are generally driven by volunteers and operate on a traditional membership model. However, they do not attract optimum business participation, which limits the capacity of the association and ultimately the region to achieve its tourism goals. It is important to understand and appreciate that these volunteers generally experience time constraints. Time away from their business is a significant contribution to the region and should never be taken for granted.

Strong local organisations are critical to the success of tourism in the region. They provide the greatest opportunity to engage locally, champion industry and community issues, and facilitate a cooperative approach to marketing, management and product development. A new approach to the role, function and capability of local associations is necessary to optimise their potential contribution.

It is also important to avoid applying a ‘one size fits all’ approach and to improve our understanding of the differing needs and capacity of each association.

### ACTIONS

68. Review the role, functions and resourcing of local organisations to determine the needs of each association to increase their capability and sustainability.

69. Build the leadership capacity of local tourism associations through mentoring, training, and other initiatives as identified in Section 3.3.7, Industry Participation and Leadership.

70. Support local organisations to take a leadership role in the implementation of Destination Action Plans.

3.3.6 Business excellence

As the foundations for a successful tourism business are efficient and professional operating practices, and the capacity to respond to changes in market preferences, it is important to support the region’s tourism operators to continuously develop their skills, knowledge, and industry networks.

### ACTIONS

71. Research business needs to identify innovative and relevant business services to enhance their capacity and competitive effectiveness.

72. Develop and implement a regional and destination Tourism Excellence program including a range of training, mentoring, recognition awards and business development services, including identification of those that can be provided directly by GORRT Ltd.

73. Develop and deliver an annual Regional Tourism Conference and/or regional/local industry networking and business development forums.
3.3 MANAGEMENT CONT.

3.3.7 Industry participation and leadership

Historically less than 15% of tourism and tourism-related businesses in the region have participated in cooperative industry activity, either as members of local/regional industry organisations, or financially supporting cooperative marketing activity. This low participation rate is unsustainable for coordinated tourism development and marketing of the region in the longer term and requires close attention by both the local associations and GORRT Ltd.

GORRT Ltd is applying a non-membership, ‘fee for service’ business model, supported by the progressive development of a comprehensive business database and communication system. This approach will seek to address the levels of participation. GORRT Ltd also recognises its products and services need to be continuously developed to be sufficiently attractive for businesses to purchase or participate in.

A regional tourism success factor, possibly the most important, is leadership by organisations or individuals. The region has a potential wealth of largely untapped leadership talent and capacity, evidenced by the contributions of over 100 local leaders in the preparation of the Destination Action Plans. If this talent could be developed and better engaged then many of the weaknesses of local organisations could be overcome and business participation would be strengthened. Other regions have successfully established a Tourism Leadership Program, which has resulted in a shared understanding of how to develop tourism and effectively build capacity.

**ACTIONS**

74. Continue to build on the quantity and quality of data of the GORRT database and maximise collaborative use by all stakeholders.

75. Develop and implement a comprehensive business communication strategy to optimise industry engagement and participation.

76. Investigate other regions’ leadership development initiatives, and implement a program that will assist in creating a new stream of industry leaders.
3.3 MANAGEMENT cont.

3.3.8 Resourcing

The Great Ocean Road region is one of Australia’s preeminent tourist destinations and needs to be recognised as such by both State and Federal Governments for resource allocation.

To implement the Strategic Master Plan, and to be competitive in the marketplace, will require cooperative resourcing by the three levels of government and the tourism industry. GORRT Ltd is well placed to provide the leadership, facilitation and management necessary to implement the plan, provided it is appropriately and competitively resourced.

The Interim Board Report, which led to the establishment of GORRT Ltd indicated that if the organisation was to be competitive with other nationally comparable regions, it needed to be cooperatively resourced by state and local governments, and the industry, at a level 50% above past contributions. Some regions, such as Gold Coast Tourism, have stolen a strong lead on other regional tourism organisations courtesy of an annual budget of around $30 million (2013-14). Whilst the Gold Coast region is the exception, its success has impacted other regions.

It is of note that the Great Ocean Road region encompasses six small population local governments compared to the Gold Coast which benefits from one large population Council.

GORRT Ltd has adopted a business model of retaining a small administration, using contracted specialists on a needs-basis and establishing performance based contracts with state and local government partners. Industry contributions are achieved through the purchase of business development and cooperative marketing services. In addition to financial contributions to GORRT Ltd, local governments of the region also employ professional tourism staff and fund tourism activities and projects in their local government area. The opportunity to leverage these resources to minimise duplication and maximise skills deployment for regional and local benefit should be explored. This may contribute to regional competitiveness and enable cooperative implementation of the Strategic Master Plan and Destination Action Plans.

**ACTIONS**

77. GORRT Ltd to seek Federal Government funding for nationally significant development and marketing projects consistent with the Strategic Master Plan. This is in line with the Federal Government’s focus on fostering international tourism to Australia.

78. GORRT Ltd to advocate for adequate resourcing of VicRoads and Parks Victoria and the prioritisation of projects to ensure nationally and internationally significant assets are upgraded to an international standard and consistently maintained.

79. Advocate for the State Government to contribute funding (both recurrent and project based) to GORRT Ltd at competitive levels commensurate with the significance of the region’s contribution to Victoria’s visitor economy.

80. GORRT Ltd to establish three-year performance based contracts with local government partners at competitive, equitable levels of financial contributions, supplemented by resource sharing and cooperative projects.
Part 4  Destination planning – municipal level
4.1 DESTINATION PLANNING

This Plan has focused on detailing the challenges, opportunities, strategies and priority actions at a whole of region level. Given the size and diversity of the region it is critical to recognise that challenges, opportunities and priorities at a destination and municipal level will reflect their individual differences. To inform this Plan and to ensure these individual differences were identified, GORRT has facilitated the development of a series of Destination Action Plans.

Destination Action Plans have been completed for the following eight areas, and implementation has recently commenced:

- Torquay
- Anglesea
- Lorne
- Apollo Bay
- The Otways
- 12 Apostles and the Hinterland
- Warrnambool
- Port Fairy.

For each plan, local leadership groups identified the key issues and priority actions that need to be addressed to maximise the return from the visitor economy within the respective destination. For copies of the Destination Action Plans please go to www.greatoceanroadtourism.org.au.

The Destination Action Plans are designed to be dynamic and continuously reviewed and modified to ensure they reflect the changing needs of the destination and its visitor markets.

The principles of Destination Action Planning can be applied to other destinations within the region. GORRT Ltd will continue to work with other destinations to develop plans where there is:

- Visitor demand growth
- Demonstrated collective commitment within a destination
- Development opportunities.

Glenelg Shire Council has recently completed a tourism strategy for the Glenelg Shire. GORRT will facilitate development of a Destination Action Plan for Portland. In addition, plans are currently proposed for Aireys Inlet and Winchelsea. This has been identified in this Strategic Master Plan as a priority action.
4.2 MUNICIPAL OVERVIEW

This section provides a summary of the visitor economy landscape for the region by municipality. The challenges, opportunities and strategic priorities of the individual municipalities is reflective of their proximity to Melbourne, population, tourism product and current visitor landscape. The following section provides a comparison of the current visitor economy landscape. GORRT has committed to the preparation of annual municipal snapshots to ensure a research foundation to decision making.

Population by Local Government Area

Source: http://forecast.id.com.au

Domestic day trips by Local Government Area

Source: National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA).

Domestic overnight visitors and visitor nights by Local Government Area

Source: National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA).
4.2 MUNICIPAL OVERVIEW CONT.

Jobs due to the direct impact of tourism spending by Local Government Area

- Glenelg: 849 jobs (7.9% of total employment)
- Moyne: 694 jobs (8.9% of total employment)
- Warrnambool: 1,328 jobs (8.3% of total employment)
- Corangamite: 483 jobs (6% of total employment)
- Colac Otway: 1,283 jobs (12.5% of total employment)
- Surf Coast: 2,687 jobs (21% of total employment)

Source: Tourism estimates from report ‘Value of tourism to the Great Ocean Road region and its local government areas 2015’ prepared by Karl Flowers and ABS Census 2011, employment by industry.

Estimated total GRP (direct + indirect) due to tourist spending\textsuperscript{a} by Local Government Area

- Glenelg: $101 million
- Moyne: $108 million
- Warrnambool: $206 million
- Corangamite: $199 million
- Colac Otway: $417 million

Source: Tourism Victoria special data service and Tourism Research Australia (TRA). Online, NVS and IVS small area results.

International overnight visitors by Local Government Area

- Glenelg: N/A
- Moyne: N/A
- Warrnambool: 21,700 visitors
- Corangamite: N/A
- Colac Otway: 81,800 visitors
- Surf Coast: 32,300 visitors

Source: International Visitor Survey, YE Sep’14, Tourism Research Australia (TRA).
4.3 SNAPSHOT BY MUNICIPALITY

This section provides a snapshot by individual municipality.

4.3.1 SURF COAST

Surf Coast Shire

- Surf Coast Shire covers an area of 1,560 km².
- The main population centres include Torquay, well known for its surf related industries and Bells Beach, Winchelsea, gateway to the fertile plains of the Western District, leafy Anglesea and the beautiful resort town of Lorne.
- The estimated residential population (ERP) in 2014 is 28,481.

Domestic day trip visitation\(^{15}\)
- Surf Coast received over 1.1 million domestic day trip visitors.
- Domestic day trip visitors spent $104 million in the region. On average, they spent $95 per trip to the region.

Domestic overnight visitors\(^{16}\)
- Surf Coast received 834,000 domestic overnight visitors.
- They stayed on average 3.6 nights in the region equating to over 3.0 million nights in the region.
- Domestic overnight visitors spent $389 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Surf Coast Shire has visitor spending in the destination equivalent to that of 5 domestic day trip visitors.

International overnight visitors\(^{17}\)
- 32,300 international overnight visitors.

Estimated total GRP (direct + indirect) due to tourist spending\(^{18}\)
- $417 million

Jobs due to direct impact of tourist spending\(^{19}\)
- 2,687 or 21% of 2011 Census measured total LGA employment

Strategic Action Priorities
- The visitor economy development priorities in the Surf Coast Shire are informed by the Destination Action Plans for Torquay, Anglesea and Lorne.

\(^{15}\) National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
\(^{16}\) National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
\(^{17}\) International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
\(^{18}\) Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
\(^{19}\) Tourism estimates from report *Value of tourism to the Great Ocean Road region and its local government areas* prepared by Karl Flowers and ABS Census 2011, employment by industry
4.3 SNAPSHOT BY MUNICIPALITY CONT.

4.3.2 COLAC OTWAY

Colac Otway Shire

- Colac Otway Shire covers an area of 3,433 km²
- The Colac Otway Shire is one of the most picturesque municipalities in Victoria, covering a diverse area from volcanic lakes, craters and plains in the north, through the hinterland forests of the Otway Ranges to the Great Ocean Road coastline. Colac is the key industrial, commercial and service centre for the Shire and surrounding region with a population of 12,000. Apollo Bay is the other major urban centre with a permanent population of 1,200.
- The estimated residential population (ERP) in 2014 is 20,501

Domestic day trip visitation

- Colac Otway received over 396,600 domestic day trip visitors
- Domestic day trip visitors spent $37 million in the region. On average, they spent $95 per trip to the region.

Domestic overnight visitors

- Colac Otway received 396,000 domestic overnight visitors
- They stayed on average 2.9 nights in the region equating to over 1.1 million nights in the region.
- Domestic overnight visitors spent $148 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Colac Otway Shire has visitor spending in the destination equivalent to that of 4 domestic day trip visitors.

International overnight visitors

- 51,900 international overnight visitors

Estimated total GRP (direct + indirect) due to tourist spending

- $199 million

Jobs due to direct impact of tourist spending

- 1,283 or 13.5% of 2011 Census measured total LGA employment

Strategic Action Priorities

- The visitor economy development priorities for Colac Otway Shire are informed by both the Apollo Bay and The Otways Destination Action Plans.

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20 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
21 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
22 International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
23 Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
24 Tourism estimates from report Value of tourism to the Great Ocean Road region and its local government areas prepared by Karl Flowers and ABS Census 2011, employment by industry.
Corangamite Shire

- Corangamite Shire covers an area of 4,407 km²
- Corangamite is located on Victoria’s Great South Coast and is home to the world renowned 12 Apostles and Great Ocean Road. The Shire itself stretches from the Shipwreck Coast in the south, past the volcanic hinterland of Camperdown and up to the pastoral area of Skipton. Corangamite is a large rural Shire characterised by its rugged coastline, lakes and craters and green pastures that are ideal for dairy farming.
- The estimated residential population (ERP) in 2014 is 16,796

### Domestic day trip visitation
- Data not available

### Domestic overnight visitors
- Corangamite received 111,000 domestic overnight visitors
- They stayed on average 2.5 nights in the region.
- Domestic overnight visitors spent $35 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Corangamite Shire has visitor spending in the destination equivalent to that of 3 domestic day trip visitors.

### International overnight visitors
- Data not available

### Estimated total GRP (direct + indirect) due to tourist spending
- $70 million

### Jobs due to direct impact of tourist spending
- 453 or 6% of 2011 Census measured total LGA employment

### Strategic Action Priorities
- The visitor economy development priorities for Corangamite Shire are informed by the Shipwreck Coast Master Plan (SCMP) and the 12 Apostles and Hinterland Destination Action Plan.

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25 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
26 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
27 International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
28 Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
29 Tourism estimates from report Value of tourism to the Great Ocean Road region and its local government areas prepared by Karl Flowers and ABS Census 2011, employment by industry
Moyne Shire

- Moyne Shire covers an area of 5,478 km²
- From the rolling green pastures that support the dairy industry to the stunning coastline beaten by waves for thousands of years, Moyne Shire is a diverse and exciting region.
- Townships include Port Fairy (population 2,560), Mortlake (pop. 941), Macarthur (pop. 246), Koroit (pop. 1,376), Caramut, Garvoc, Woolsthorpe, Hawkesdale, Kirkstall, Ellerslie, Panmure, Peterborough (pop. 148), Framlingham and Hexham.
- The estimated residential population (ERP) in 2014 is 16,344

**Domestic day trip visitation**

- Data not available

**Domestic overnight visitors**

- Moyne received 186,000 domestic overnight visitors
- They stayed on average 2.5 nights in the region equating to over 1.1 million nights in the region.
- Domestic overnight visitors spent $60 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Moyne Shire has visitor spending in the destination equivalent to that of 3 domestic day trip visitors.

**International overnight visitors**

- Data not available

**Estimated total GRP (direct + indirect) due to tourist spending**

- $108 million

**Jobs due to direct impact of tourist spending**

- 694 or 8.9% of 2011 Census measured total LGA employment

**Strategic Action Priorities**

- The development priorities for Moyne Shire are informed by the Shipwreck Coast Master Plan (SCMP) and the Port Fairy Destination Action Plan.

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30 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
31 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
32 International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
33 Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
34 Tourism estimates from report *Value of tourism to the Great Ocean Road region and its local government areas* prepared by Karl Flowers and ABS Census 2011, employment by industry
4.3 SNAPSHOT BY MUNICIPALITY CONT.

4.3.5 WARRNAMBOOL

City of Warrnambool

- The City of Warrnambool, with a population of over 33,000, is the largest city in south-west Victoria. It is situated in the municipality of Warrnambool, which covers 120 km², and also contains the towns of Allansford, Woodford and Bushfield. Warrnambool is the major regional centre for health care, education, professional services and sport and culture.

Domestic day trip visitation

- Warrnambool received over 477,000 domestic day trip visitors
- Domestic day trip visitors spent $45 million in the region. On average, they spent $95 per trip to the region

Domestic overnight visitors

- The City of Warrnambool received 301,000 domestic overnight visitors
- They stayed on average 3.3 nights in the region equating to over 981,000 nights in the region.
- Domestic overnight visitors spent $127 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Warrnambool City has visitor spending in the destination equivalent to that of 4.5 domestic day trip visitors.

International overnight visitors

- 21,700 international overnight visitors

Estimated total GRP (direct + indirect) due to tourist spending

- $206 million

Jobs due to direct impact of tourist spending

- 1,328 or 8.8% of 2011 Census measured total LGA employment

Strategic Action Priorities

- The development priorities for the City of Warrnambool are informed by the Warrnambool Destination Plan.

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35 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
36 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
37 International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
38 Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
39 Tourism estimates from report Value of tourism to the Great Ocean Road region and its local government areas prepared by Karl Flowers and ABS Census 2011, employment by industry
4.3 SNAPSHOT BY MUNICIPALITY CONT.

4.3.6 GLENELG

Glenelg Shire
- Glenelg Shire covers an area of 6,212 km²
- Glenelg Shire offers a diverse landscape from coastal to rural
- Townships include Portland, Casterton, Heywood, Dartmoor and Nelson
- The estimated residential population (ERP) in 2014 is 19,764

Domestic day trip visitation
- Data not available

Domestic overnight visitors
- Glenelg received 175,000 domestic overnight visitors
- They stayed on average 4.4 nights in the region equating to over 771,000 nights in the region.
- Domestic overnight visitors spent $100 million in the region. On average, they spent $129 per night in the region.
- Each overnight domestic visitor to Glenelg Shire has visitor spending in the destination equivalent to that of 6 domestic day trip visitors.

International overnight visitors
- Data not available

Estimated total GRP (direct + indirect) due to tourist spending
- $101 million

Jobs due to direct impact of tourist spending
- 6,49 or 7.4% of 2011 Census measured total LGA employment

Strategic Action Priorities
- The visitor economy development priorities for Glenelg Shire have been informed through the Glenelg tourism master plan.

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40 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
41 National Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
42 International Visitor Survey, YE Sep 14, Tourism Research Australia (TRA)
43 Tourism Victoria special data service and Tourism Research Australia (TRA) Online, NVS and IVS small area results
44 Tourism estimates from report Value of tourism to the Great Ocean Road region and its local government areas prepared by Karl Flowers and ABS Census 2011, employment by industry.
APPENDIX

- Measured tourism to the Great Ocean Road region increased significantly in 2014 due to changes in domestic tourism data collection

  - Measured tourism to the Great Ocean Road region had a large jump in 2014 due largely to changes by Tourism Research Australia in the way they collected domestic tourism data. The large step jump in the economic value of tourism to the Great Ocean Road in the 2014 calendar year is yet to be reflected in the priority accorded tourism to this region by local and State Government stakeholders.

  - As domestic tourism represents 94% of visitor economy spending in this region this was a key change. Prior to 2014, domestic tourism data was collected by surveying from land-line phones only. It was recognised increasingly that this sampling methodology led to under collection of typically younger travellers and the wealthy who have dispensed with land lines in favour of using mobile phones only. From the beginning of 2014, domestic tourism data will be collected with half the sample from land-lines and half from mobile phones.

  - The result of the changed methodology was that total visitor economy spending in the Great Ocean Road jumped by 10% between 2011/12 and 2014 after inflation. Given that total visitor economy spending in this region fell by 1% between 2007 and 2013 after inflation this is a significant change. Total visitor spending to the Great Ocean Road region grew more strongly than the 6% growth after inflation between 2011/12 and 2014 for regional Victoria as a whole or Melbourne.

  - The largest change in tourist spending to the Great Ocean Road region was in the dominant sector of domestic overnight visitors that had increased real spending of 18%. After this step-jump in economic contribution tourism spending to the region is expected to return to much lower underlying growth rates.