



# **VISITOR ECONOMY MASTER PLAN FOR THE GREAT OCEAN ROAD REGION 2021-2030**

**REBUILDING A STRONGER AND MORE  
ROBUST AND BALANCED VISITOR ECONOMY**

**LATEST UPDATE SEPTEMBER 2021**

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## NAVAGATING THIS DOCUMENT

This is an interactive plan that will be continually updated.



**To navigate** through the document - use the arrow located at the page edge. Right to go forward, left to go back.

**The index** is a short cut to an individual section and you can navigate back to the contents at the top of your screen at any time.

You will also see an **action box** – Suggested sections to read next to help you find what may be most relevant next.

Within the document you will also see **action prompts**:

### LOOK FOR THESE PROMPTS

-  Hover for more
-  Click for more

# ACKNOWLEDGEMENTS

## ABOUT THE AUTHORS

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**This plan has been prepared by Great Ocean Road Regional Tourism (GORRT).**

Great Ocean Road Regional Tourism is the Regional Tourism Board (RTB) for the Great Ocean Road region representing the six local Government areas of Surf Coast, Colac Otway, Corangamite, Moyne, Warrnambool and Glenelg.

GORRT facilitates a collaborative approach to growing the return from the visitor economy for the Great Ocean Road Region.

The plan has been developed with a strong evidence base and GORRT acknowledges the work of Anstra, Decisive Consulting Pty Ltd, Ispy Strategy and Research, Cyclone Creative and Customer Frame for their contributions.



GREAT OCEAN ROAD  
REGIONAL TOURISM LIMITED

## STRATEGY PRODUCTION

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**Production of this Strategy was funded by the Australian Government through the Building Better Regions Fund.**



**BUILDING OUR FUTURE**

## TRADITIONAL CUSTODIANS

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**Great Ocean Road Regional Tourism Ltd acknowledges the Traditional Custodians of the Great Ocean Road region the Wadawurrung, Eastern Maar and Gunditjmara.**

We pay our respects to their Ancestors, past present and emerging.

We recognise and respect their unique cultural heritage and the connection to their traditional lands.

We commit to building genuine and lasting partnerships that recognise, embrace and support the spirit of reconciliation, working towards self determination, equity of outcomes and an equal voice for Australia's first people.

**PART A**  
**SETTING THE SCENE**

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An aerial photograph of a coastal landscape. A paved road curves along a sandy beach on the left, then crosses a river via a bridge. The surrounding hills are covered in dense green forest, with some open grassy areas. The sky is bright with scattered clouds.

S1  
THE JOB TO BE DONE

# INTRODUCTION

## A ROADMAP FROM RECOVERY TO RENAISSANCE

### Purpose

This plan provides a strategic framework and roadmap to guide the regional visitor economy recovery from the COVID-19 pandemic to 2024 and ensure renewed strong sector growth from 2024 to 2030. It does this by emphasising responsible, sustainable and resilient policies that balance social, economic, environmental and cultural outcomes.

### Before COVID

The historic impact of the COVID pandemic has required revisions to the previous 2015-25 Strategic Master Plan to the Visitor Economy of the Great Ocean Road region. This previous plan had strategies that pre-COVID were working well, with 80% of strategies implemented and with forecast growth of the visitor economy to 2020 achieved by 2018.

Prior to the pandemic the GOR visitor economy was one of the largest industry sectors in the GOR region. In 2018/19 a total of 18% of the gross regional product and 17% of all regional jobs were due to the \$1.9b direct visitor spending. This visitor spending followed from attracting 7m total visitors incorporating 8m visitor nights and 4.5m day trip visitors.

### COVID impacts

It is difficult to overstate the impact of COVID in forcing economic depression, not recession, on the global, national and regional visitor economy. Global forecasts by McKinsey and Company and IATA (the international airline association) are for recovery in the global visitor economy to 2019 levels by 2024 or 2025.

In Australia, the full impact of COVID on the visitor economy has been largely disguised up till the end of March 2021 by the JobKeeper wage subsidy and moratoriums on repayments, rents and bankruptcies in 2020. In addition, our comparative national success at limiting infections means we have to wait longer before international borders can re-open. The second punch is about to hit the Australian visitor economy.

The impacts of the COVID-19 pandemic in 2020 and throughout 2021 has and will powerfully reinforce the importance of the visitor economy in the GOR region. The pandemic impact is forecast to result in between 3,400 and 4,700 job losses by mid 2021. This will be due to business closures, reduced staffing and increased business debt stress. Recovery to pre-pandemic levels of regional visitor spending is expected to take until 2024.

[READ MORE](#)



### PRIOR TO THE PANDEMIC THE REGION ATTRACTED



# PLANNING PATHWAY

## RECOVER - FOSTER - THRIVE

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This plan has been prepared as a 10 year plan but is distinctly broken into three phases.

### **RECOVER** 2021-2024

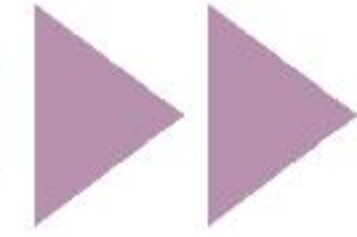
Build a collaborative approach to supporting industry recovery – building back better – to a stronger more resilient visitor economy.

### **FOSTER** 2023-2027

Realise the development pipeline and the “new” product and visitor infrastructure and amenity offering across the region including a revitalised Twelve Apostles, Budj Bim Cultural Landscape, Cape Bridgewater Resort etc.

### **THRIVE** 2027-2030

Build on the momentum and ensure a continued focus on the return from the visitor economy. Maintain a focus on building a resilient and responsive sector. Refresh long term objectives.



# BUILDING THIS PLAN

## A COLLABORATIVE APPROACH

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### Destination Action Plans

The plan has been informed through the development of 16 Destination Action Plans. These Destination Action Plans have been facilitated by Great Ocean Road Regional Tourism in collaboration with destination community, industry and local government stakeholders. They identify achievable priorities that if implemented will support developing a desired visitor economy.

### Local Government Plans

The preparation of the plan has reviewed and incorporated economic development and tourism plans prepared by local government partners and their priority projects.

### State Government Plans

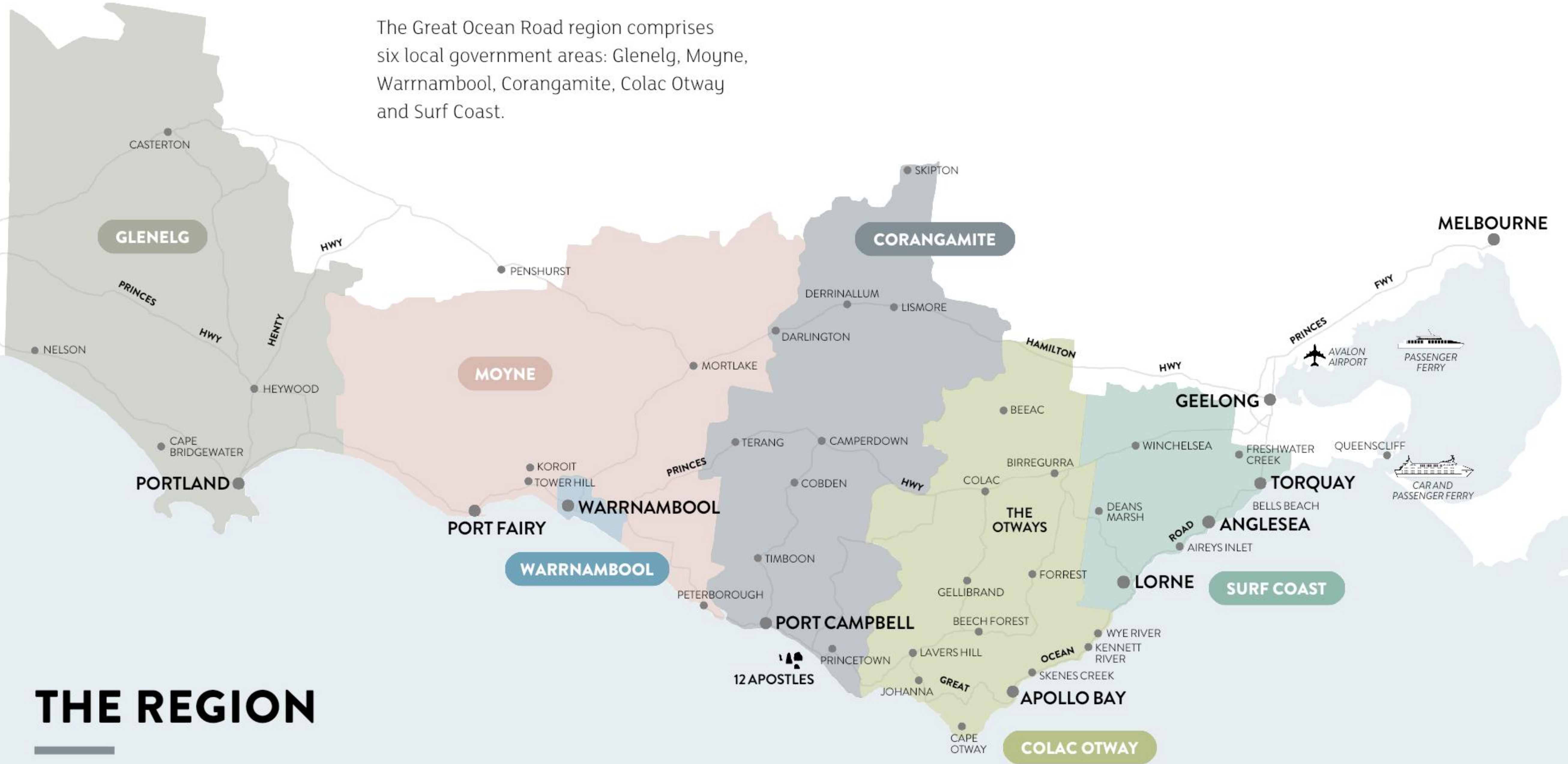
The plan draws on the strategies and plans developed by the various State Government Agencies in support of the visitor economy – including the [Great Ocean Road Action Plan](#), [Accommodation Demand and Supply Study](#), [Infrastructure Planning report](#) and the [Visitor Economy Recovery and Reform Plan](#).

### Evidence Base

The plan has been built on evidence and independent research commissioned by GORRT, including looking at trend data over the past 10 years from Tourism Australia's National Visitor Survey and International Visitor Survey data surveys.



The Great Ocean Road region comprises six local government areas: Glenelg, Moyne, Warrnambool, Corangamite, Colac Otway and Surf Coast.



# THE REGION

# SUCCESS

## WHAT WOULD IT LOOK LIKE?

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### **Global recognition**

The region has the highest global eco certification demonstrating a balanced, resilient and thriving visitor economy that is managing impacts on its natural assets, supports community livability outcomes and cultural diversity and is driving jobs and economic value across the region.

### **Game changing infrastructure and new products and experiences**

Infrastructure and product development investment (public and private) , has developed a region offering demand driven, competitive, year-round, diverse experiences that are servicing a balanced portfolio of markets. The region has a range of hero demand driving products and experiences.

### **A balanced portfolio of visitors**

Retaining strong visitation from Melbourne, the region has become a must do for interstate and international visitors seeking active nature-based and rich cultural experiences.

### **A portfolio of iconic attractions**

The region has a range of iconic experiences which has reduced its dependence on the 12 Apostles and motivated increased overnight stays, yield and visitation dispersal.

### **Strategic long-term vision implemented**

The implementation of the Great Ocean Road Action Plan has facilitated joined up government and community engaged planning and public asset maintenance and renewal that is the benchmark for other destinations and regions

### **Visitors aligned with our core values**

Visitors love the region and contribute to its maintenance and renewal.



**A REGION WHICH  
EXEMPLIFIES A  
BALANCED, MANAGED  
AND THRIVING  
VISITOR ECONOMY**

# EXECUTIVE SUMMARY

## MESSAGE FROM THE CHAIR

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**WATCH >** Great Ocean Road Regional Tourism chair Wayne Kayler-Thomson.

OBJECTIVES



RESPONSIBLE TOURISM PRINCIPLES



STRATEGIC DIRECTION



## VISION

**Over the past 30 years, the Great Ocean Road visitor economy has experienced exponential growth of visitor numbers, driven by collaborative national, state and regional marketing of its outstanding natural attractions and experiences.**

However, the high-volume visitation has significantly under delivered in-region yield, and resulted in visitor congestion and poor visitor experience, especially at the 12 Apostles.

Decades of failure to adequately invest in public and private infrastructure has resulted in a gaping multi-billion-dollar supply-demand gap.

The 100 year pandemic impact in 2020 has devastated the region's visitor economy and the post pandemic economic environment will be very different. Recovery will require innovation, policy reform and government intervention to address market failure and apply new approaches.

A return to "business as usual" will not address the socio-economic, environmental and cultural challenges facing the region and risks continuing the decades of failure to capitalise on the opportunities.

Successful Implementation of the 2015-20 Master Plan has resulted in a \$1.5b investment pipeline of public and private projects to start to fill the supply-demand gap. The priority is to fast track the implementation of these projects and to attract and develop a second round of investments to continue the progress.

The regional economy will benefit in the short term from the impacts of construction and will be better prepared to meet and manage the expected return of visitation to the pre pandemic growth forecasts beyond 2023-24.

This will make the "big difference" required to recover better and stronger from the pandemic and lay the foundation for a new future.

Investment in delivery of infrastructure, public and private must also drive cultural, social and environmental outcomes and these should be embedded in planning and implementation.

READ MORE



# VISITOR ECONOMY FUTURE PATHWAYS

The region has the opportunity to use COVID recovery as a chance to reset and address the growing challenges that have faced the region over the past decade.

Critical is having a collaborative agreed approach that growth must be managed and that a complex and interdependent suite of levers are necessary to manage outcomes.

Success will be achieved by leading with a visitor management approach as highlighted in the table, or click below for a full explanation:

ACHIEVING SUCCESS



|  | RECOVERY & UNMANAGED GROWTH                                 | RECOVERY & MANAGED GROWTH                                 | RECOVERY & HIGH GROWTH           |
|--|---|---|----------------------------------|
| <b>Strategy</b>                          | Marketing lead recovery                                     | Visitor management lead recovery                          | Development lead recovery        |
| <b>Timeframe</b>                         | Return to pre-COVID visitation by 2025<br>Driven by numbers | Return to pre-COVID expenditure by 2023<br>Driven by \$\$ | Fast and strong numbers and \$\$ |
| <b>Visitor congestion</b>                | ↑   | Diffused  | ↑                                |
| <b>Visitor satisfaction</b>              | ↓   | ↑   | ↻                                |
| <b>Environment impact</b>                | ↑   | Managed   | ↑                                |
| <b>Community impact</b>                  | ↓   | ↑   | Overwhelmed                      |
| <b>Cultural impact</b>                   | ↓   | Recognised and engaged                                    | ↻                                |
| <b>Public infrastructure investment</b>  | Limited (\$200m)  | Significant (\$1b)  | Scaling up (\$2b)                |
| <b>Private infrastructure investment</b> | Limited (\$1b)  | Significant (\$2b)  | Excessive (\$5b)                 |
| <b>Supply/demand gap</b>                 | Widening  | Managed   | Demand taking over sx.           |
| <b>Brand recognition</b>                 | Weak  | Recognised  | Out of alignment                 |
| <b>Brand damage</b>                      | Leading to reduced competitiveness                          | Enhanced and competitive                                  | Eroded by mass visitation        |
| <b>Governance reforms</b>                | Unrealised  | Effective   | ↑                                |
| <b>Destination Action Plans</b>          | Under resourced   | Implemented   | Unable to keep pace              |
| <b>Responsible tourism principles</b>    | Ignored   | Applied   | Challenged                       |
| <b>Workplace challenges</b>              | Exacerbated   | Overcome  | ↑                                |
| <b>Visitor servicing</b>                 | Ad hoc  | Intergrated   | Overwhelmed                      |

# VISITOR ECONOMY

## A BALANCED & RESILIENT VISITOR ECONOMY

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To achieve a balanced and resilient visitor economy we need to facilitate a change in the way the region is consumed.

**BUILD A STRONG  
EVIDENCE BASE**

**INTEGRATE ACTIVATION OF ALL LEVERS**

**POLICY, REGULATION  
& LEGISLATION**

**SYSTEMS, TOOLS &  
PROCESSES**

**INFRASTRUCTURE  
– PUBLIC & PRIVATE  
PRODUCT &  
EXPERIENCES**

**EDUCATION**

**COMMUNICATION**

**PROMOTION**

# RECOVERY & MANAGED GROWTH DEVELOPMENT GOALS

To support recovery and deliver managed growth this strategy is aligning with the universally accepted United Nations Sustainable Development Goals.

In particular goals:



Hover over goals for information:

**GOAL 8**



**DECENT WORK & ECONOMIC GROWTH**

**GOAL 9**



**INDUSTRY, INNOVATION & INFRASTRUCTURE**

**GOAL 11**



**SUSTAINABLE CITIES & COMMUNITIES**

**GOAL 12**



**RESPONSIBLE CONSUMPTION & PRODUCTION**

**GOAL 13**



**CLIMATE ACTION**

**GOAL 14**



**LIFE BELOW WATER**

**GOAL 15**



**LIFE ON LAND**

**GOAL 17**

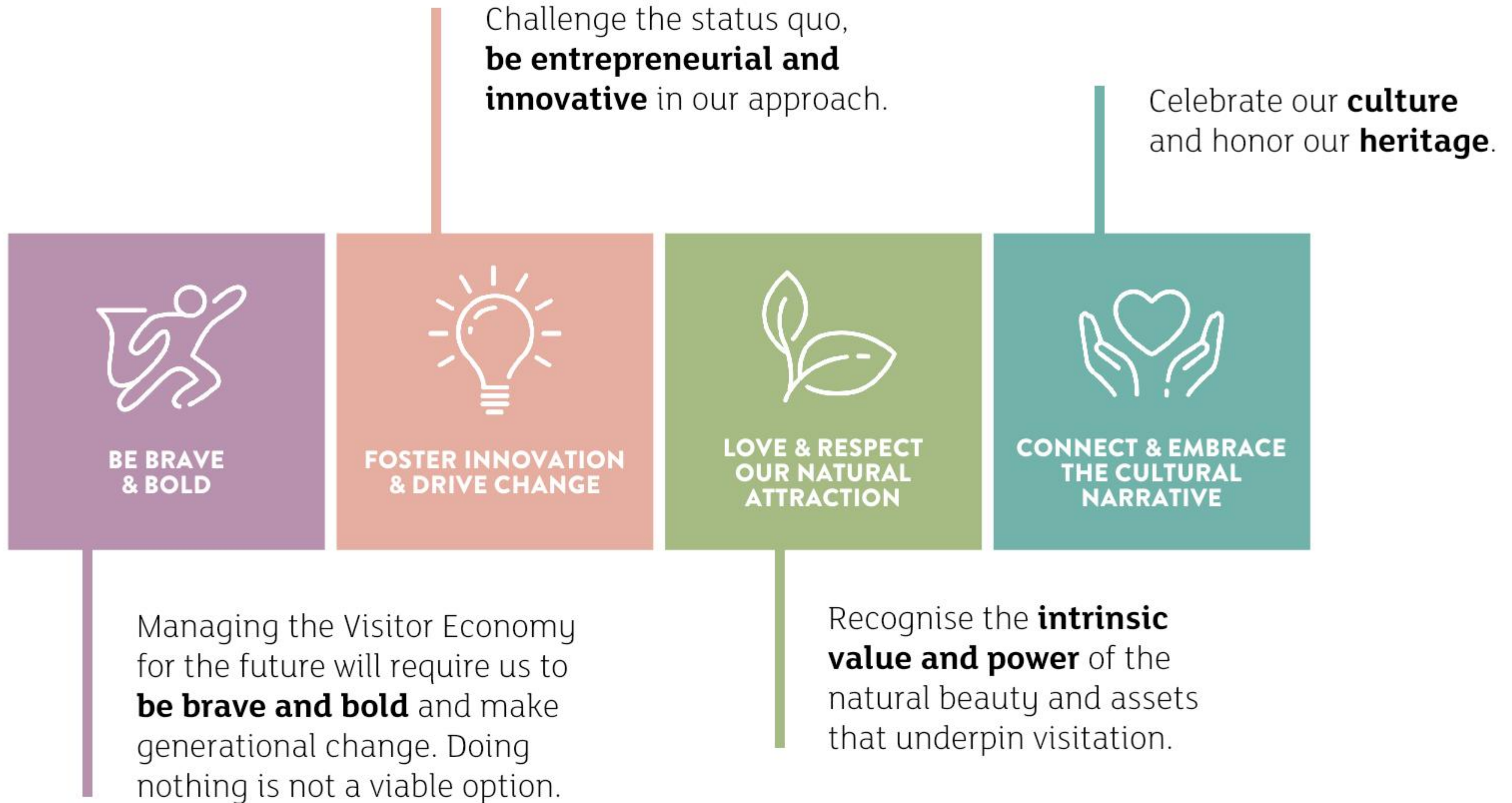


**PARTNERSHIPS FOR THE GOALS**

# VALUES

## OUR REASON FOR BEING

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# OVERARCHING GOALS

## OUR PRIORITIES

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Success will deliver:



**THRIVING, INCLUSIVE  
AND RESILIENT  
VISITOR ECONOMY**



**STRONG  
SUSTAINABLE  
COMMUNITIES**



**HEALTHY NATURAL  
ENVIRONMENT**



**ALIGNMENT OF VISION  
OF STAKEHOLDERS  
AND NEW LEVELS OF  
COLLABORATION**



# GUIDING PRINCIPLES

## WHAT'S IMPORTANT

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# OBJECTIVES

## BETTER AND STRONGER

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|             |   |
|-------------|---|
| ECONOMIC    | + |
| CULTURAL    | + |
| SOCIAL      | + |
| ENVIRONMENT | + |



# GAME CHANGING PRIORITIES

The Master Plan lays out comprehensive and achievable strategies to recover from the impacts of the global pandemic and to address the challenges and opportunities to achieve a stronger and better-balanced visitor economy.

To accelerate and maximise the development of a balanced and vibrant visitor economy, the following “Game Changing” ideas should be vigorously pursued.

Progressing these ideas will require a new level of regional cooperation and governance between the six GOR local councils, Great Ocean Road Coast and Parks Authority and a strategic partnership between GOR and Geelong Bellarine regions, plus support from State and Federal Governments.

## ECONOMIC

Adopt visitor and beneficiary pays principles to generate new revenue to invest in improving visitor and community infrastructure

Attract, facilitate and accelerate \$3b investment (public and private) to bridge the supply-demand gap and change visitor behaviour

Integrate, develop and promote regional agriculture and tourism experiences as the two primary drivers of the regional economy

Invest significantly in digital infrastructure capacity, performance and capability

Implement an integrated transport network

## ENVIRONMENTAL

All developments (public and private) to be required to restore/regenerate natural landscapes

Establish and market “Volunteer Environmental Tourism” projects

A global leader in regional climate change mitigation and responsible tourism practice

Recognise traditional owners and support development of indigenous cultural experiences.

## COMMUNITY

Market to conscious consumers that share our values and pursue slow and purposeful and immersive visitor experiences

Encourage “Conscious Hosts” to welcome visitors and to grow the VFR market

Apply the Environment and Community Fund for local facilities and services development projects

Develop, support and promote seamless and integrated indigenous cultural experiences

Invest significantly in arts and culture to develop a standout regional strength

A regional “visitor first” approach to visitor servicing

# SUCCESS FACTORS

## ENABLING A POSITIVE OUTCOME

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### **Authentic, quality product, services and experiences to actively target desired visitors**

Create memorable experiences that attract the people we want to visit when we want them to visit who leave as enduring ambassadors. Focus on value not volume.

### **Visitor contributions supporting maintenance and renewal of our natural assets and visitor amenity**

All beneficiaries to the visitor economy must be financially supporting its maintenance and renewal, especially visitors.

### **Agile and responsive approach to ensure short-term challenges do not derail long term goals**

Be proactive in identifying and actively attracting the development and investment in visitor infrastructure that supports the region's vision and long-term strategy.

### **Strategic integrated partnerships – regional strategy, collaborative deliver**

New levels of strategic partnerships and collaboration will be critical to driving new, innovative solutions.



# PARTNERSHIP APPROACH

## THE PLAYERS

This strategy recognises that implementation requires the ongoing commitment from all stakeholders and beneficiaries to the visitor economy.

No single agency or organisation has sole responsibility and new levels of cooperation and collaboration will be required to drive change and manage the desired outcomes.



**ONGOING COMMITMENT  
FROM ALL STAKEHOLDERS  
AND BENEFICIARIES  
IS REQUIRED TO  
IMPLEMENT THE STRATEGY**

THE PLAYERS >



# COMPLEXITY OF TASKS THE PORTFOLIOS

**This strategy recognises that no one portfolio will deliver the long-term vision and drive desired outcomes.**

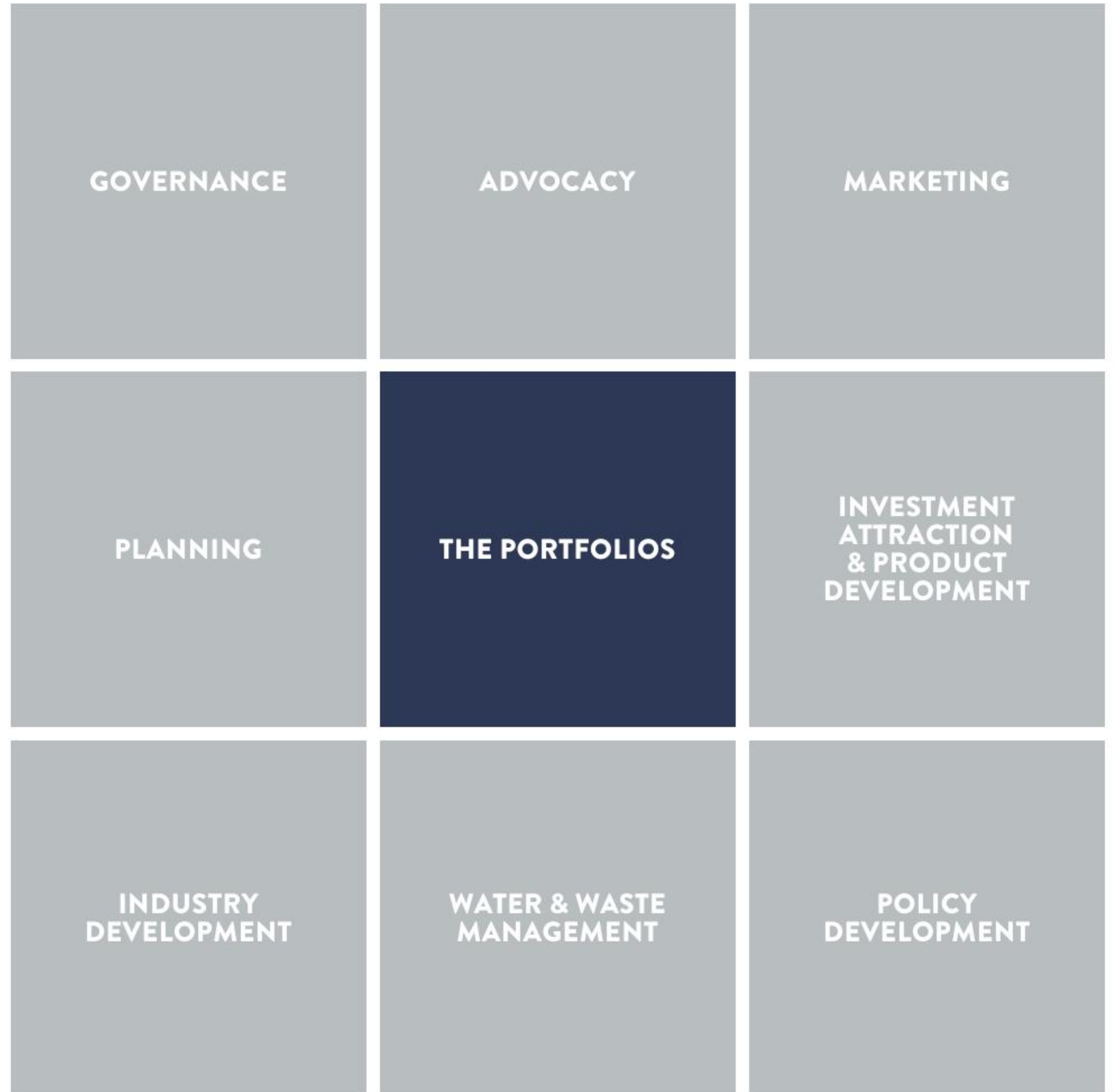
Understanding the interdependency of the portfolios and the different but congruent roles of all players within the portfolios will be critical to supporting new levels of cooperation and collaboration.

Demand driving activity and change must be underpinned and supported by supply-side change. Supply-side change must support demand management strategies.



**THE LONG-TERM VISION  
AND DESIRED OUTCOMES  
MUST BE DELIVERED  
BY ALL PORTFOLIOS**

THE PORTFOLIOS >



# SUCCESS FACTORS FOR REGIONAL TOURISM

GORRT has applied evidence based best practice [Success Factors for Regional Tourism](#) to prepare Destination Action Plans for 16 of the region's destinations and also for a diagnostic assessment of the current state of the regions visitor economy performance.

These success factors characteristics, indicators and assessment provide valuable insights to guide the development of sustainable destination visitor economies and as such have been applied to the development of strategies and actions of this Master Plan.

| SUCCESS FACTORS   | DIAGNOSTIC RATING | COMMENT   |
|---|-------------------|---|
| Strong local tourism organisation                                     | 5/10              | Ongoing evolution and focus on Destination Action Plan implementation   |
| Strong regional tourism organisation                                  | 8/10              | Victoria's Regional Tourism Review rated GORRT as a high performing Regional Tourism Board<br>Evolve GORRT business model |
| Local government support  | 7/10              | Continuous improvement and regional focus   |
| Local leadership  | 8/10              | Continuous improvement  |
| Strategic planning  | 8/10              | Master Planning for the sector<br>Destination Action Plans for destinations   |
| Visitor service excellence  | 5/10              | Implement visitor servicing strategy – regional approach required   |
| Research driven cooperative marketing                                 | 7/10              | Develop market analysis<br>Increase business participation  |
| Breadth and depth of tourism infrastructure, products and experiences | 6/10              | Deep Supply gap<br>Progress investment pipeline   |
| Risk management plans   | 6/10              | Whole of region planning continuously improving   |
| Supportive communities  | 6/10              | Enhance engagement and communication  |

S2

**THE VALUE OF THE VISITOR ECONOMY  
PRE-COVID**



# RESEARCH OVERVIEW

## EVIDENCE BASE

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**This plan has adopted a strong evidence-based approach. This commences with an overview of the pre-covid structure of the visitor economy followed by an analysis of the extent of the disruption and impacts of the COVID pandemic and a number of scenarios of possible paths of recovery.**

It is important to recognise target markets and the functioning of the visitor economy will change through recovery and rebuilding and an agile approach will be required to guide the pace of change and implementation.

Ongoing monitoring will enable an agile, innovative and dynamic strategic approach to implementing the plan.



**PRIOR TO THE  
COVID-19 PANDEMIC  
THE REGION  
ATTRACTED A HIGH  
VOLUME OF VISITORS**

**Note:** This Master Plan uses YE June 19 data to ensure alignment between tourism satellite account data and visitation data.

# VISITOR ECONOMY

## ECONOMIC CONTRIBUTION

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**THE VISITOR ECONOMY  
IS A DOMINANT  
DRIVER OF THE  
REGION'S ECONOMY**

# VISITOR ECONOMY EMPLOYMENT CONTRIBUTION

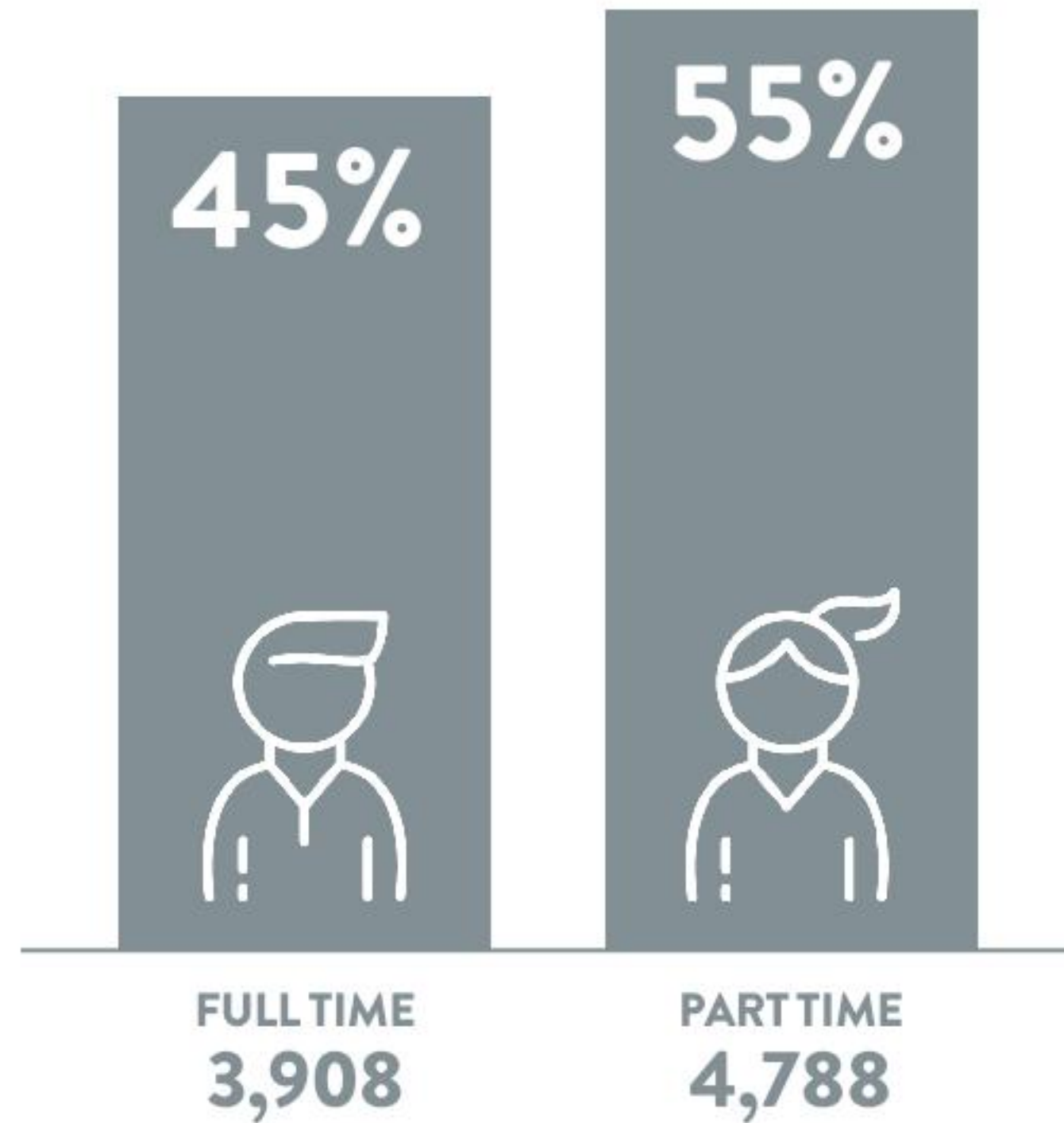
The visitor economy is a significant employment contributor to the region's economy. It represents 18% of all jobs in the region (13% direct and 5% indirect):

- There are over **1,900** tourism dependant businesses within the region.
- **1,200** employing businesses

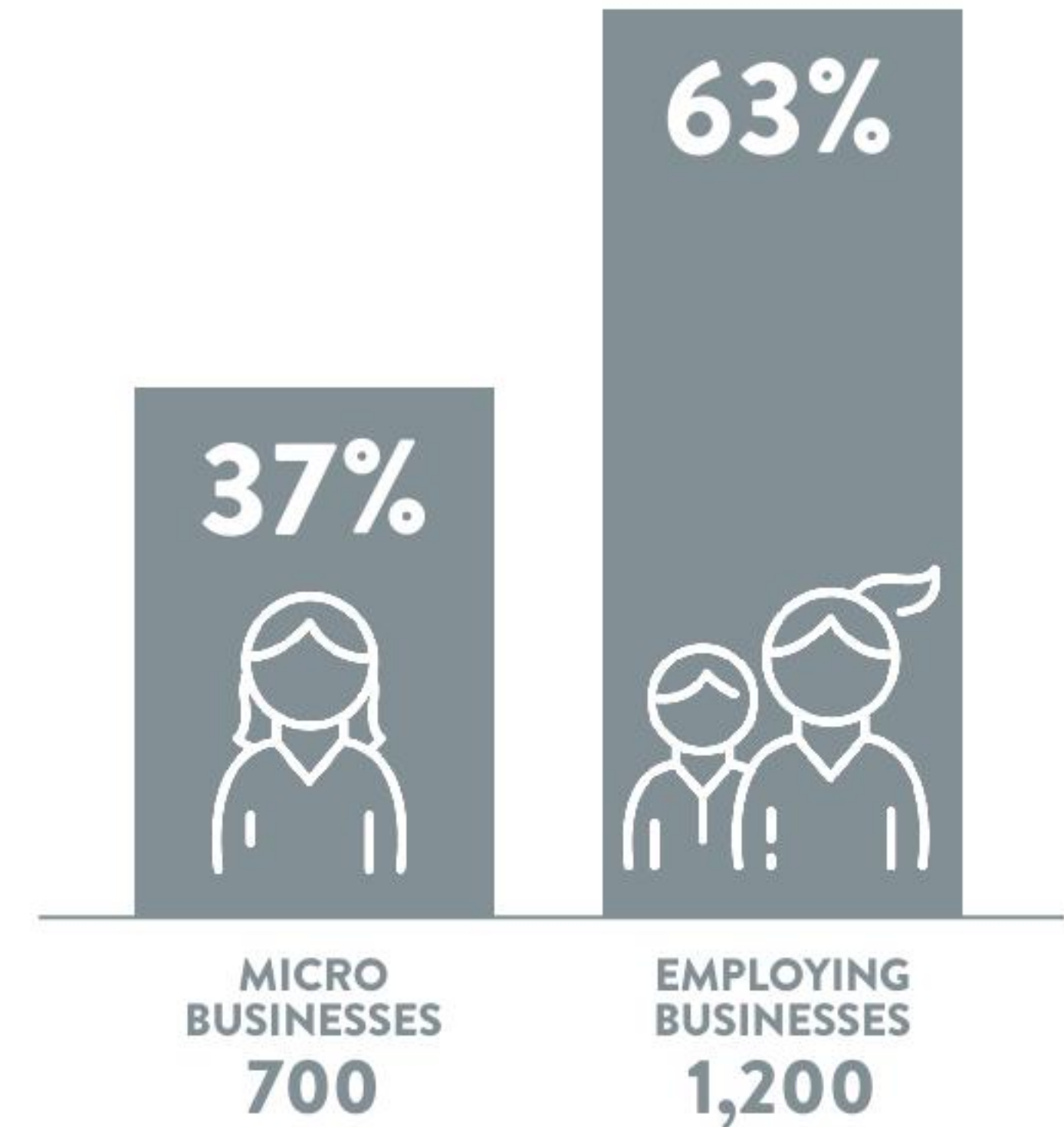


**THE VISITOR ECONOMY  
CONTRIBUTES 18% OF THE  
REGION'S EMPLOYMENT**

**EMPLOYMENT BY TYPE**



**TOURISM DEPENDANT  
BUSINESSES**



# VISITOR ECONOMY

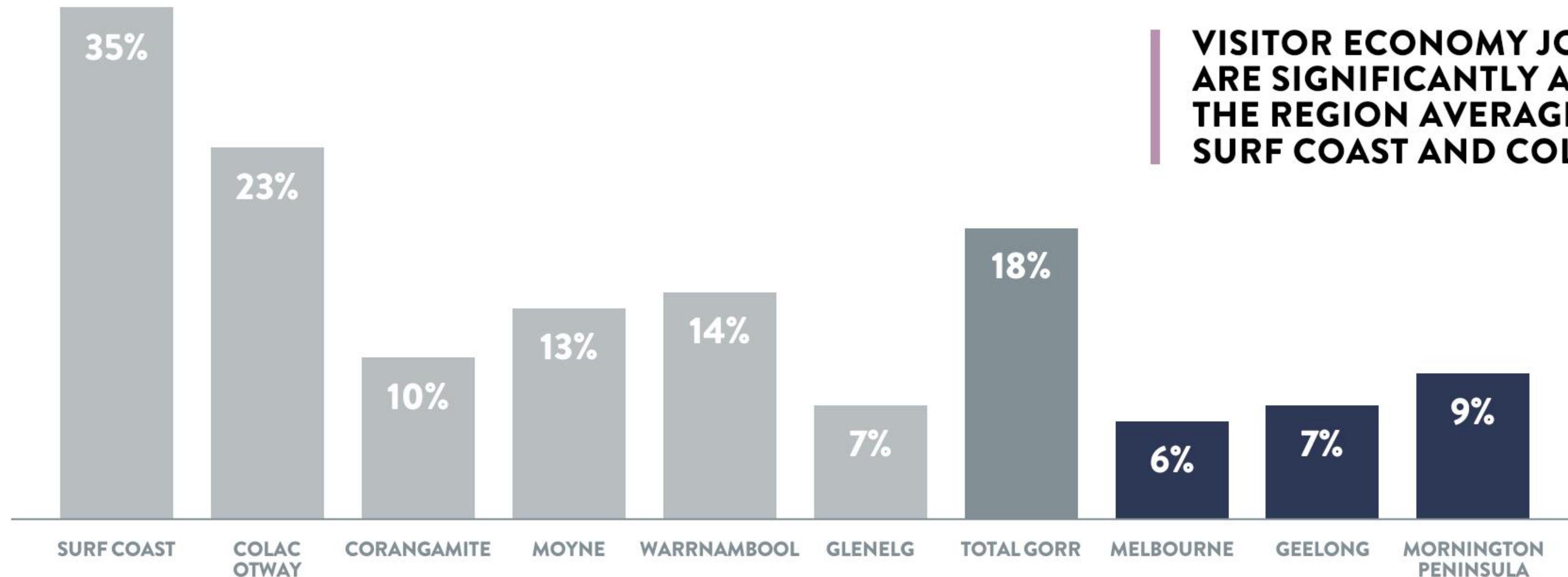
## EMPLOYMENT CONTRIBUTION BY LOCAL GOVERNMENT AREA

18% of jobs in the Great Ocean Road Region are dependent on the visitor economy:

- Significantly **greater** than Melbourne, Geelong and Mornington Peninsula
- Significantly **more important** in Surf Coast and Colac Otway



**VISITOR ECONOMY JOBS  
ARE SIGNIFICANTLY ABOVE  
THE REGION AVERAGE IN  
SURF COAST AND COLAC OTWAY**



SUGGESTED SECTIONS TO READ NEXT +

# TOTAL VISITATION

## YEAR ENDING JUNE 2019



1. Includes international daytrip visitors  
2. Does not include international daytrip expenditure

# DOMESTIC VISITATION

## YEAR ENDING JUNE 2019

### DOMESTIC DAY



### DOMESTIC OVERNIGHT



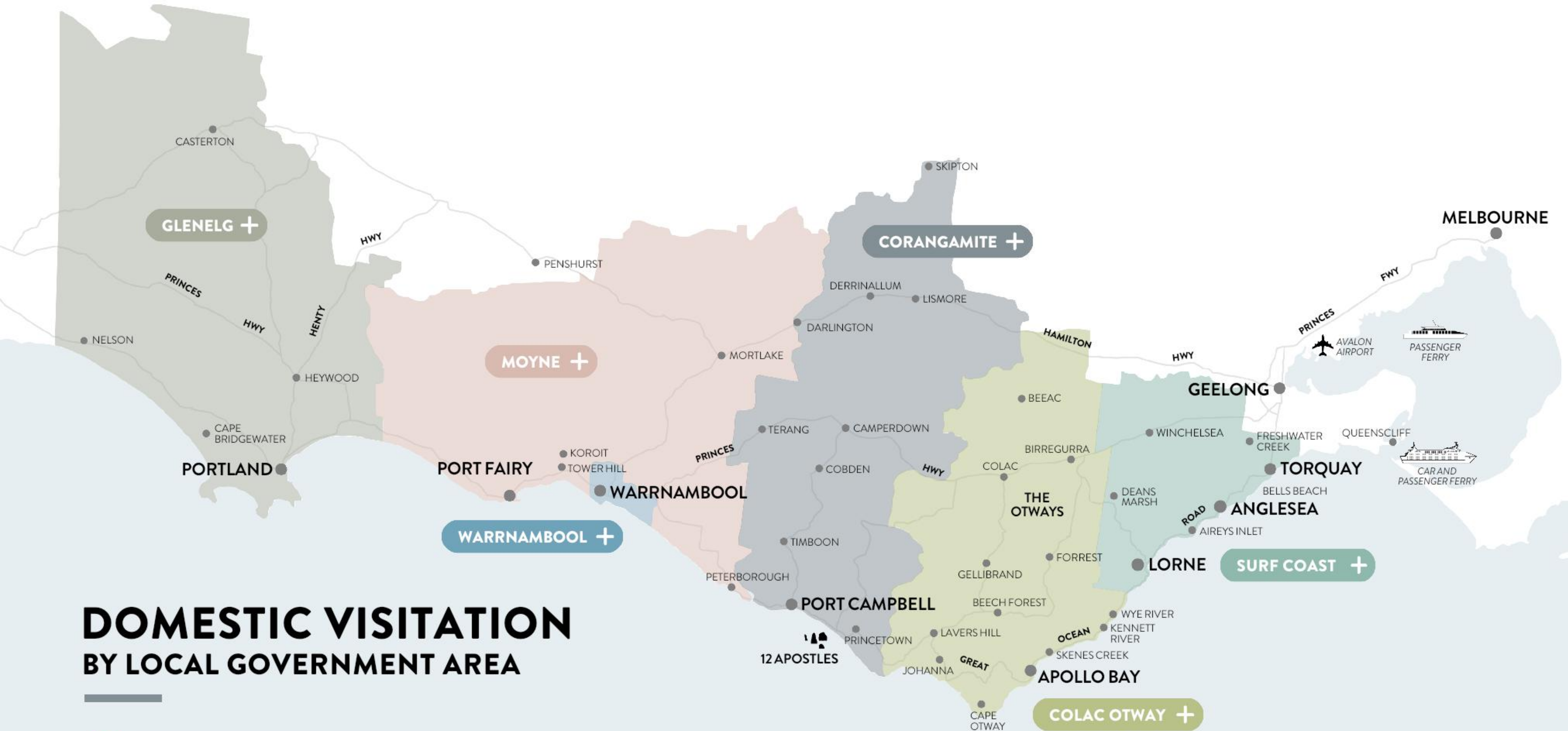
### TOTAL DOMESTIC VISITATION



|  |   |
|--|---|
| OVERVIEW OF DOMESTIC DAY TRIP VISITORS             | + |
| OVERVIEW OF DOMESTIC OVERNIGHT STAYS BY STATE      | + |
| OVERVIEW OF DOMESTIC OVERNIGHT STAYS BY VIC REGION | + |
| WHERE DOMESTIC VISITORS STAY                       | + |
| WHERE INTERSTATE OVERNIGHT VISITORS ORIGINATE FROM | + |



**PRIOR TO THE COVID-19 PANDEMIC DOMESTIC VISITATION DOMINATED**



# DOMESTIC VISITATION BY LOCAL GOVERNMENT AREA



Click on coloured markers (+) for domestic visitation by local government area:

# INTERNATIONAL VISITATION

## YEAR ENDING JUNE 2019

### INTERNATIONAL DAY



### INTERNATIONAL OVERNIGHT



### TOTAL INTERNATIONAL VISITATION



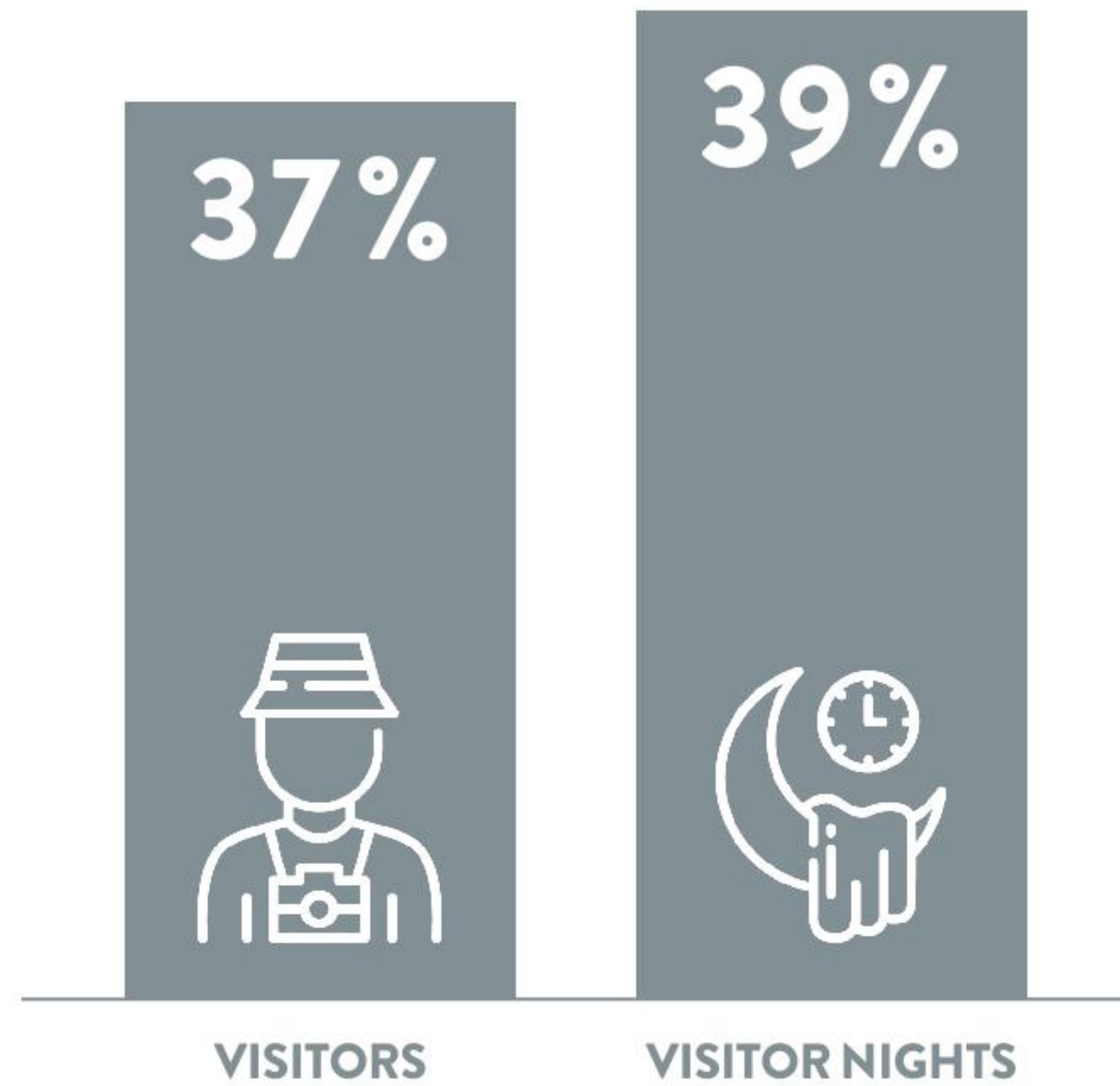
**PRIOR TO COVID-19  
DAY TRIPS DOMINATED  
INTERNATIONAL  
VISITATION**

1. Includes international daytrip visitors

2. Does not include international daytrip expenditure

# VISITATION GROWTH

2010 - 2019



**GROWTH SINCE 2010  
HAS CONTINUOUSLY  
EXCEEDED FORECASTS**

**Since 2010:** Compound average annual growth of 4.8% p.a.

# INTERNATIONAL OVERNIGHT STAYS

## INTERNATIONAL VISITATION BY COUNTRY

The Great Ocean Road receives the largest number of international overnight visitors to Victoria outside of Melbourne: 251,000 visitors representing 977,000 nights and \$109 million in expenditure.

- **21%** of international overnight visitation originate from the longer stay markets of UK (12%) and Germany (9%)
- **19%** of all other international overnight visitors originate from mainland China
- **9%** from Germany
- **7%** from the US
- France, Singapore and New Zealand each representing about **5%**



### INTERNATIONAL OVERNIGHT TRAVEL

↑  
1.7%

251K  
VISITORS



↑  
2.7%

977K  
VISITOR  
NIGHTS



↓  
-0.9%

\$109M  
EXPENDITURE



A woman with dark hair is seen from the side, leaning out of the open window of a classic silver car. She is looking out over a vast, scenic landscape. In the foreground, there is a grassy hillside with tall, yellow-green grasses. A wire fence runs across the middle ground. Beyond the fence, a large, calm blue lake stretches across the valley. The background features rolling green hills under a clear blue sky. The car's rear taillight and a portion of the rear window are visible on the right side of the frame. Inside the car, a wooden sign with an upward-pointing arrow is visible through the window.

| S3  
THE VISITOR JOURNEY

# THE VISITOR JOURNEY

## TRAVELLER TYPES - JOURNEY - PROFILES

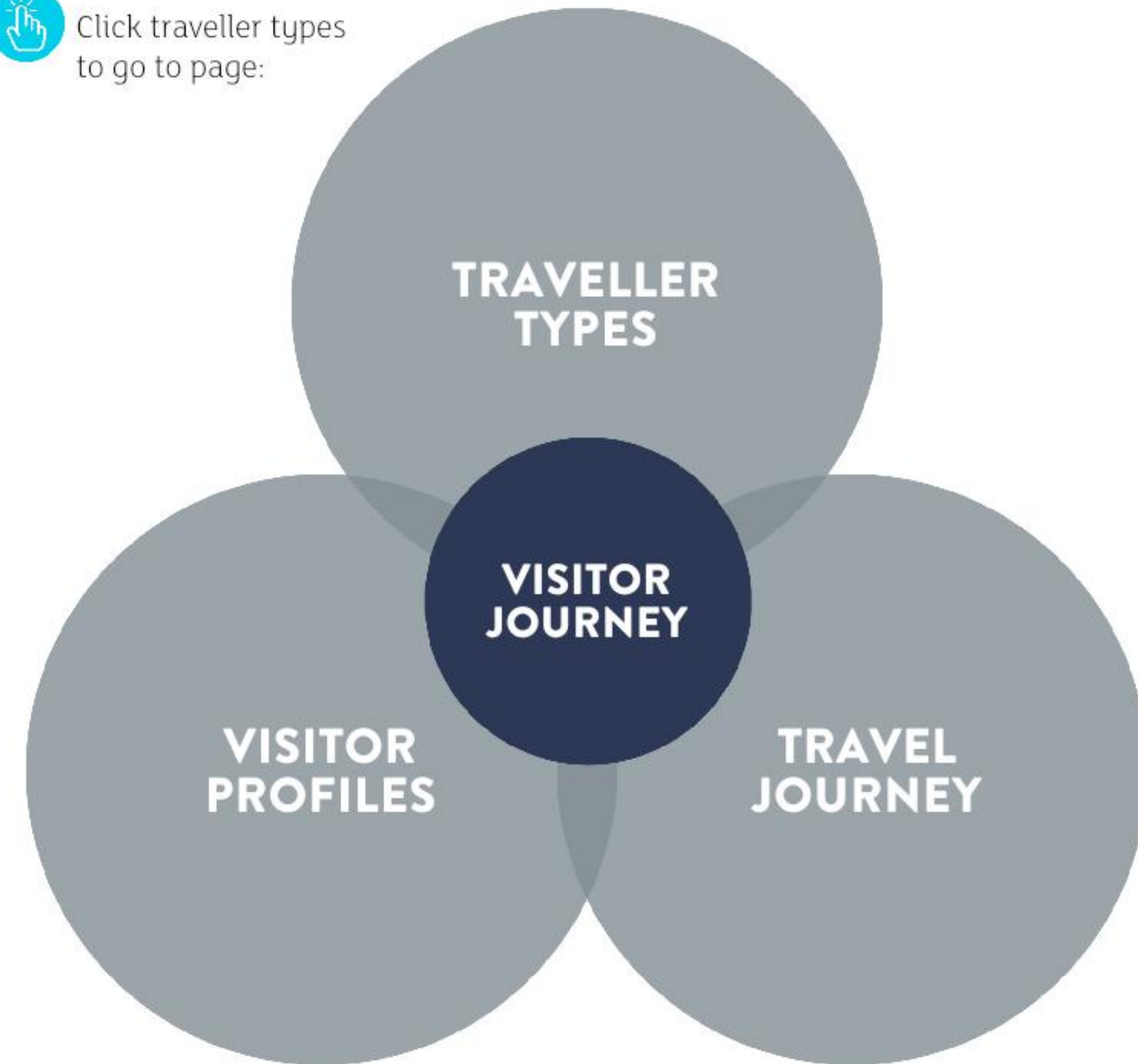
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There are a number of ways we can segment and characterise travellers:

- **Traveller types** looks at how they are consuming the region and how often they travel. This has been broken into four key types:
  - First Timers
  - Returners
  - Familiar Explorers
  - Adventurers
- **Travel journey** highlights the primary travel routes through the region
- **Visitor Profiles** provide an overview of how different visitor profiles consume the region.



Click traveller types  
to go to page:



# TRAVELLER TYPES

## LOOKING BENEATH THE NUMBERS

With approximately 8 million visitors to the region it is critical to look beneath the numbers and explore the type of visitor, their motivations for travel and their key journey.

- Many visitors travel key linear routes
- The primary coastal route – east-west along the Great Ocean Road
- Inland routes – Princes or Hamilton Highways
- Visitors significantly under-estimate the time to get to key destinations
- The majority of day trip coaches travel an identical route – east along the Great Ocean Road and heading back inland stopping at Anglesea for morning tea, Apollo Bay for lunch and arriving at the 12 Apostles late afternoon before traveling inland and back home along the Princes Highway stopping in Colac or Winchelsea
- The coast and visitation to key beaches is a significant driver of day trip visitation and good weather is a predictor of strong day trip visitation
- The region has high seasonality with Q1 the most significant quarter for overnight visitation.
- 40% of all visitors – 3 million visitors per annum – visit the 12 Apostles
- Events are a significant driver of visitation



Click images to view profiles:



**WE NEED TO LOOK BENEATH THE NUMBERS AND EXPLORE THE TYPE OF VISITOR**

< **FOUR TRAVELLER TYPES**

# TRAVEL JOURNEY

## KEY VISITOR ROUTES



Hover to view routes:

KEY COASTAL ROUTE 1



KEY COASTAL ROUTE 2



KEY COASTAL ROUTE 3



KEY COASTAL ROUTE 4



KEY INLAND ROUTE 1



KEY INLAND ROUTE 2



KEY INLAND ROUTE 3



SUGGESTED SECTIONS TO READ NEXT

# VISITOR PROFILES BY CONSUMPTION BEHAVIOUR

**Visitor Profiles describe visitors by how they consume the region.**

They are classified into four master groups:

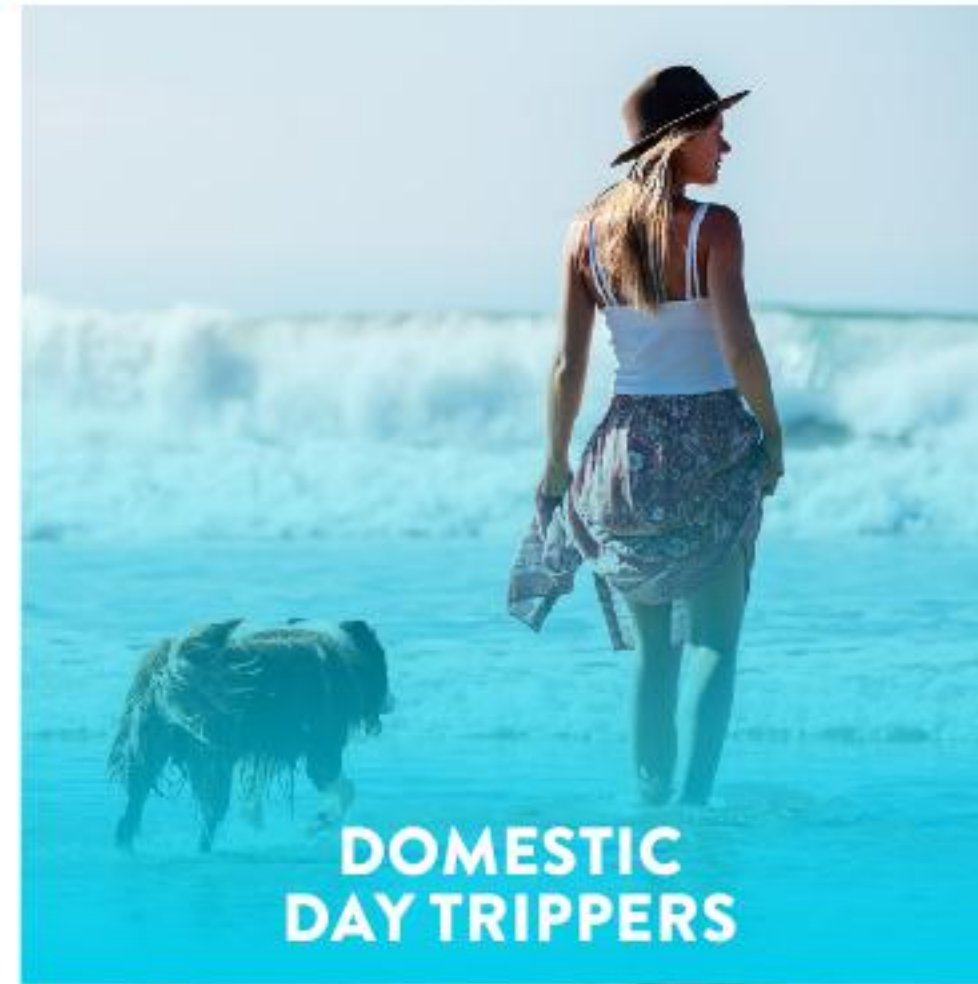
- Domestic Day Trippers
- Domestic Overnight visitors
- International Day Trippers
- International Overnight visitors

Within these groups they are then broken down by what is their primary motivator for travel and/or how they travel.

Explore these profiles to understand where they come from, the journey they take, attractions they visit and what new products, services & experiences may appeal to them.



Click images to view profiles:



**WE NEED TO LOOK  
BENEATH THE  
NUMBERS AND  
EXPLORE THE  
TYPE OF VISITOR**

< FOUR VISITOR PROFILES

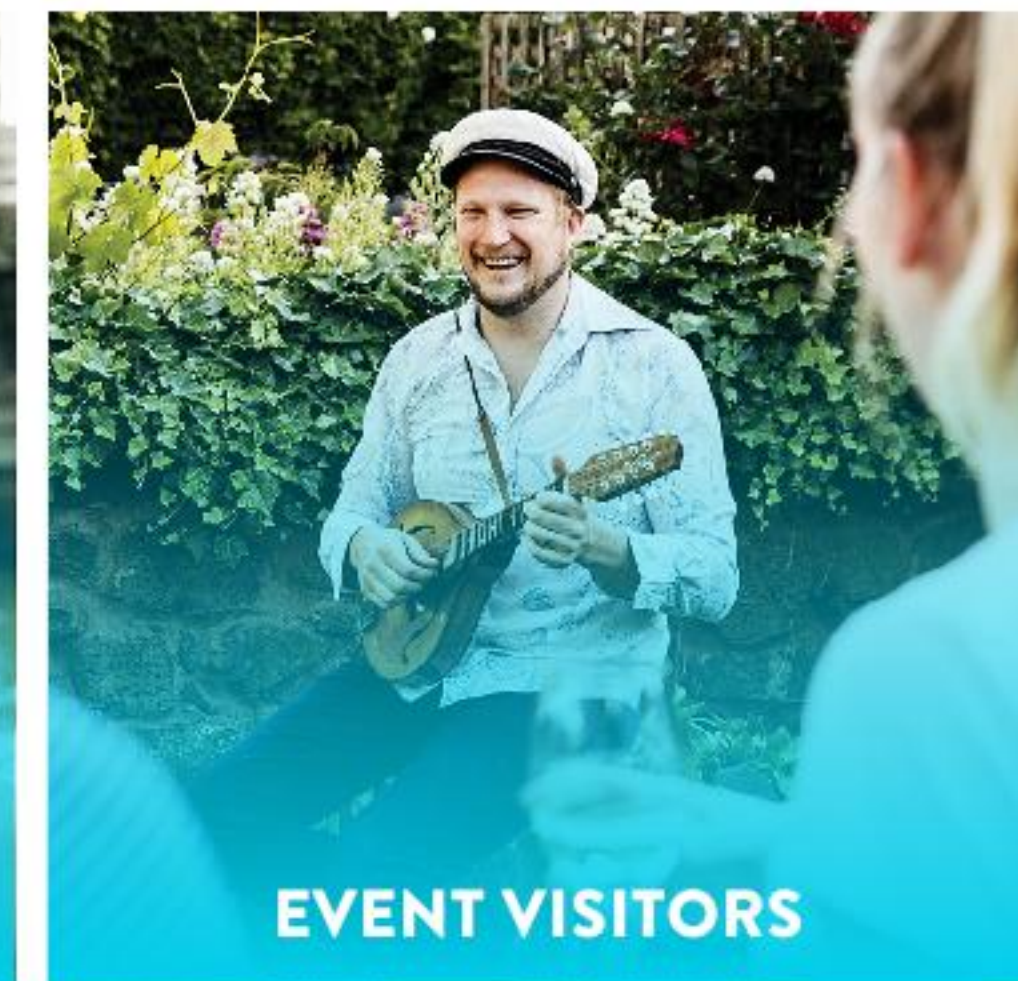
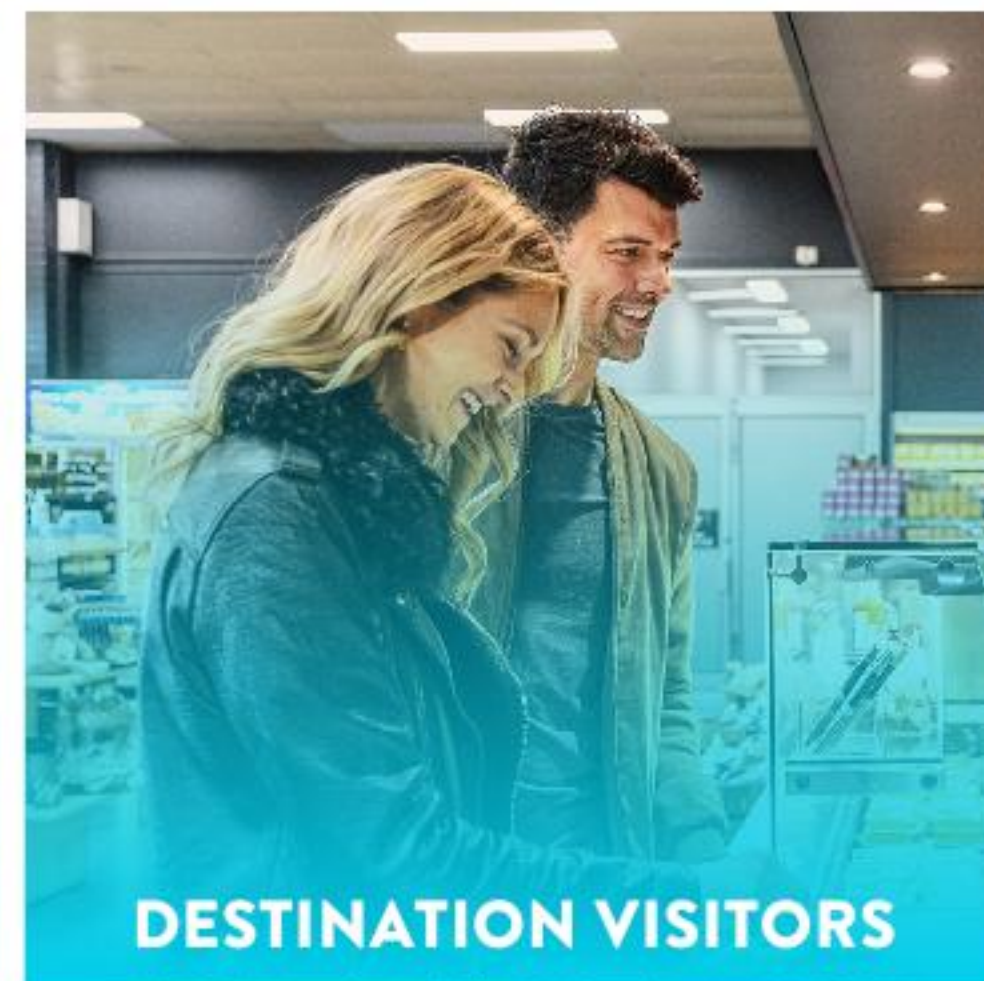
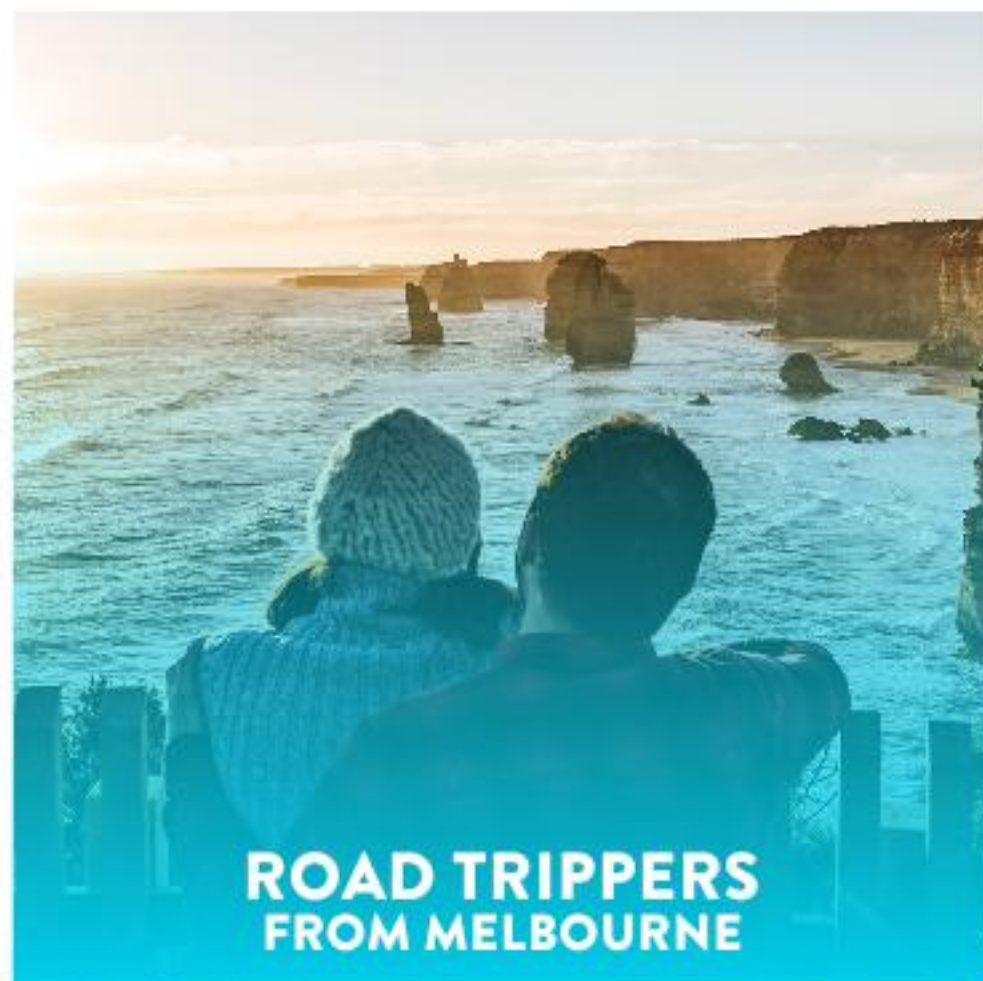
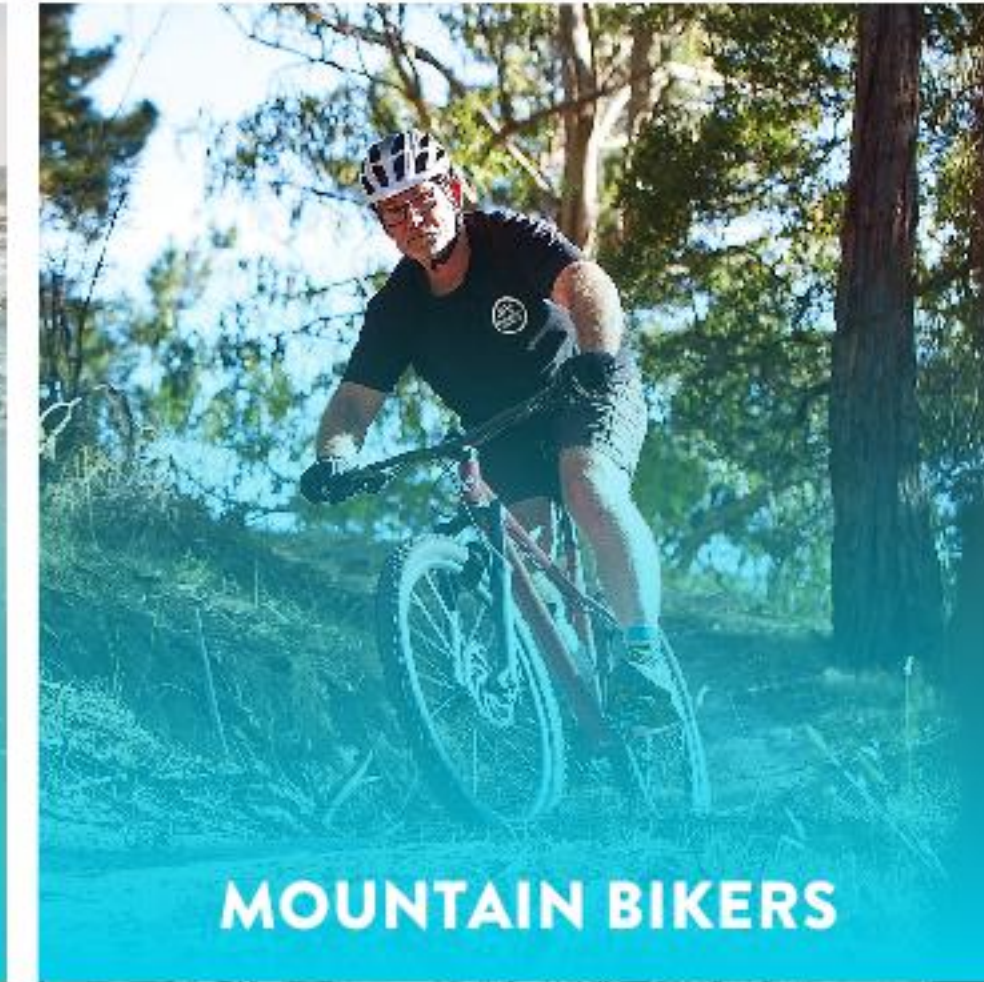
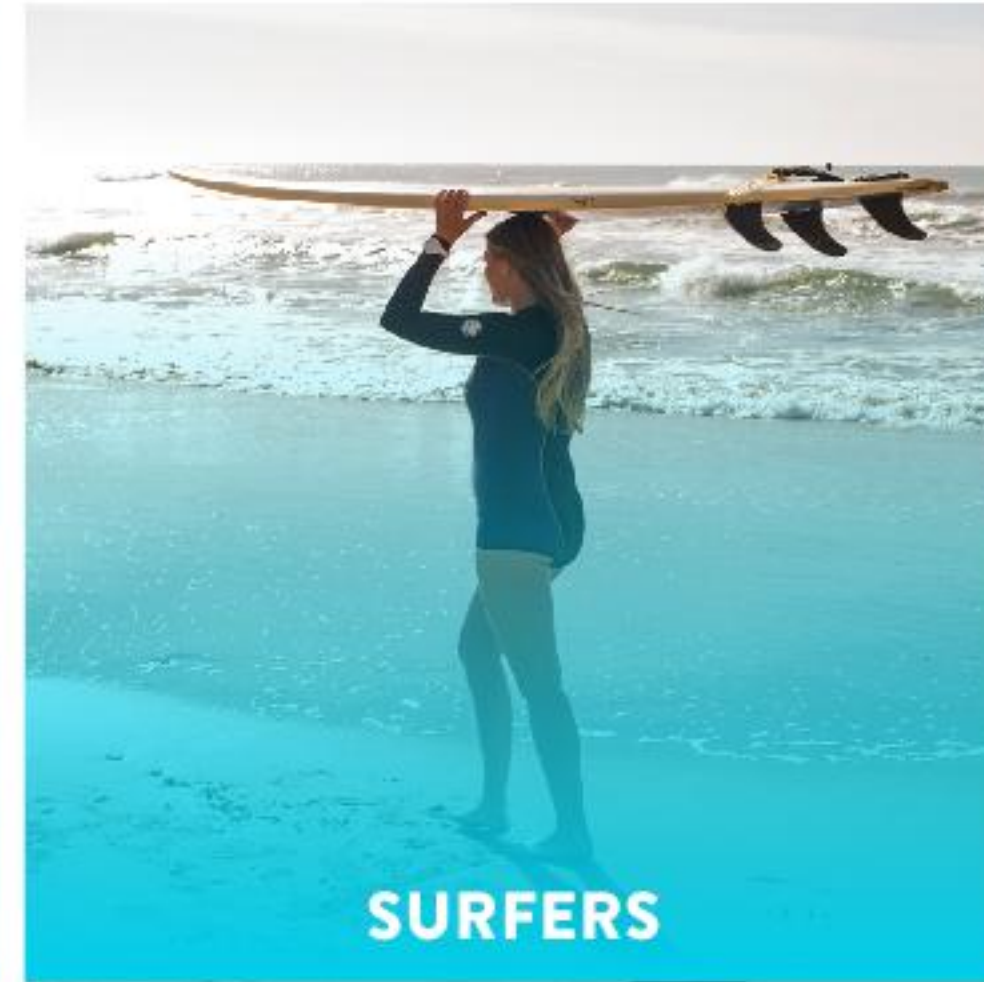
# VISITOR PROFILES

## DOMESTIC DAY TRIPPERS

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Click images to view profiles:



# VISITOR PROFILES

## DOMESTIC OVERNIGHT VISITORS

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Click images to view profiles:



# VISITOR PROFILES

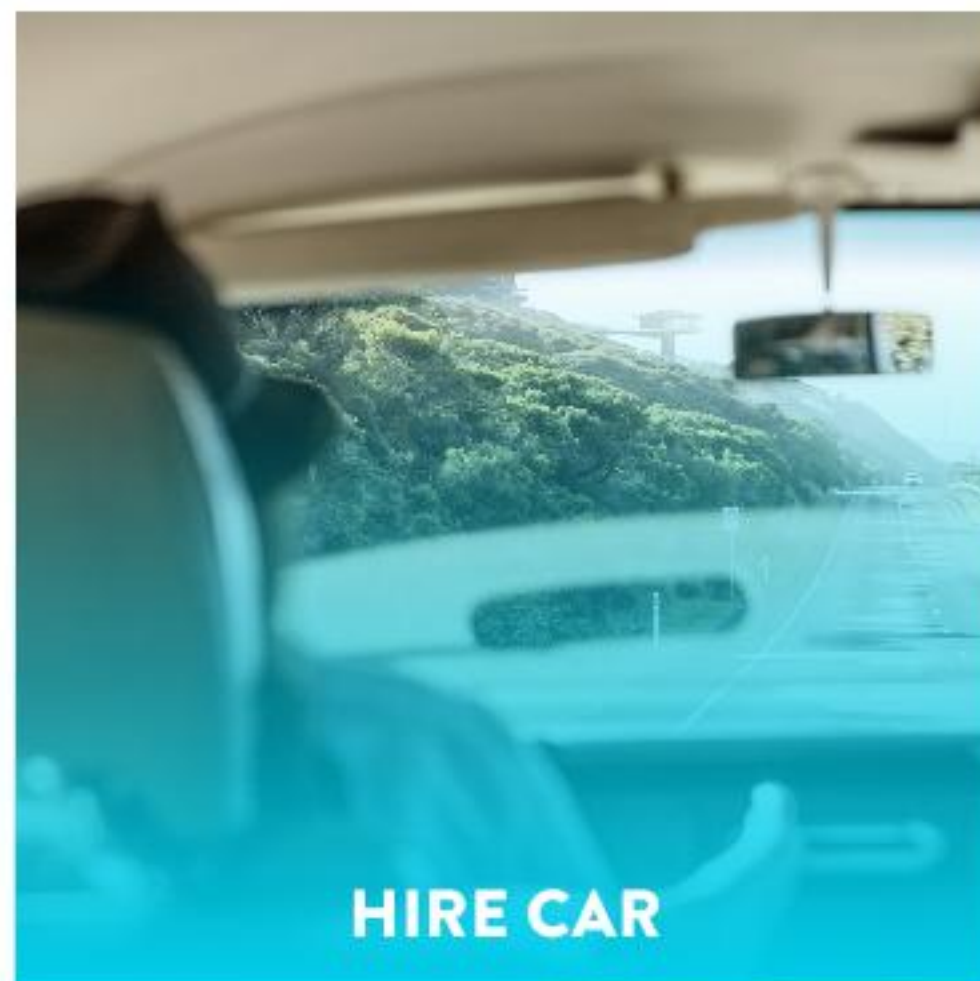
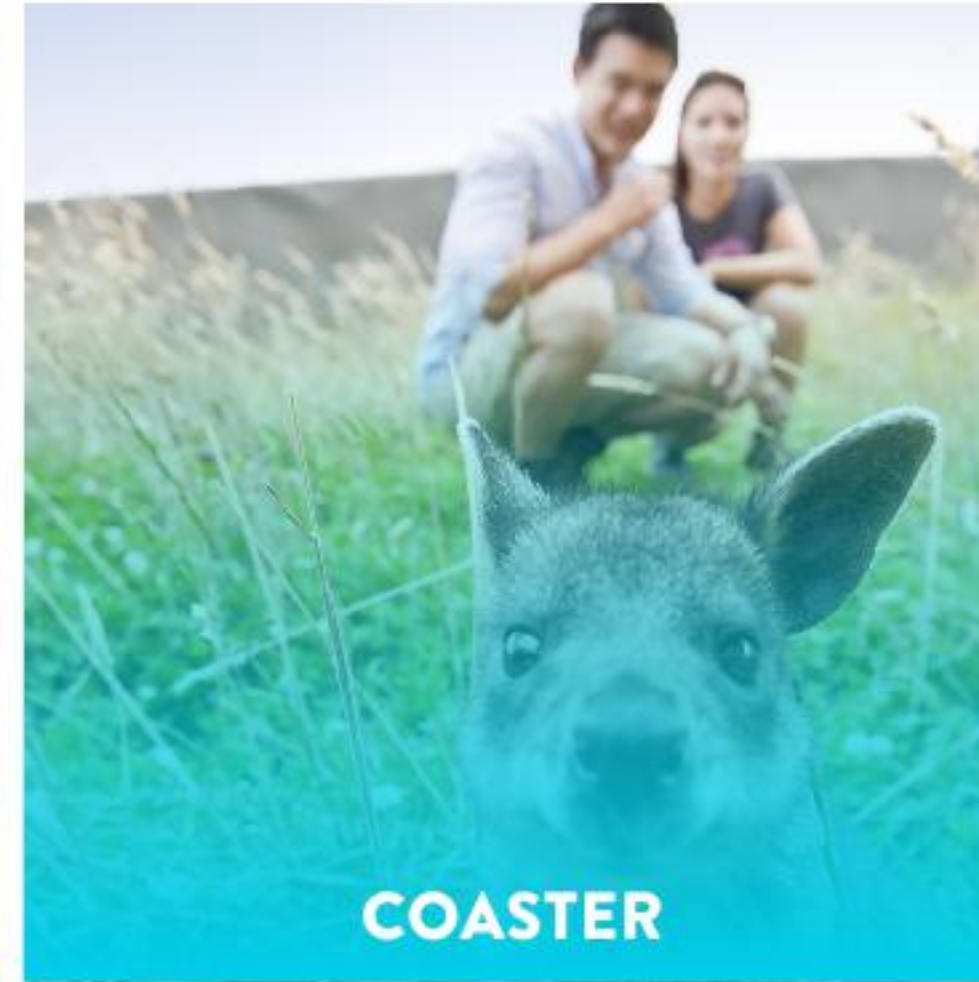
## INTERNATIONAL DAY TRIPPERS

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Click images to view profiles:

The region attracts a high volume of low yield international day trip visitors. It is critical that these markets are managed to reduce the impact on community and the regions capacity to service. The future focus is on shifting this market to longer stays.



# VISITOR PROFILES

## INTERNATIONAL OVERNIGHT VISITORS

---



Click images to view profiles:



# INTERNATIONAL TOURING

## GREAT SOUTHERN TOURING ROUTE

For more than 30 years South West Victoria has built the road trip brand Great Southern Touring Route (GSTR), focusing on trade and consumer in multiple international markets, Great Southern Touring Route is a collaborative approach to destination marketing with resources contributed by Regional Tourism Boards, Visit Victoria, Austrade and local operators.

GSTR has substantial investment in resources for marketing the region internationally including in-market representation in Germany and China and works closely with Tourism Australia and Visit Victoria. GSTR offers the key drivers of destination choice for international consumers such as Wildlife & Nature, Aquatic & Coastal, History & heritage and Food & Wine. Marketing the region in a holistic offer such as a road trip encourages regional dispersal and longer stays, key objectives of all regional destinations worldwide.

Primary markets include:

- South East Asia – Indonesia, Singapore, Malaysia and India
- China
- Uk/Europe with an emphasis on Germany
- North America
- New Zealand



Great Southern Touring Route





S4  
**KEY DEMAND DRIVING  
PRODUCTS & EXPERIENCES**

# REGIONAL

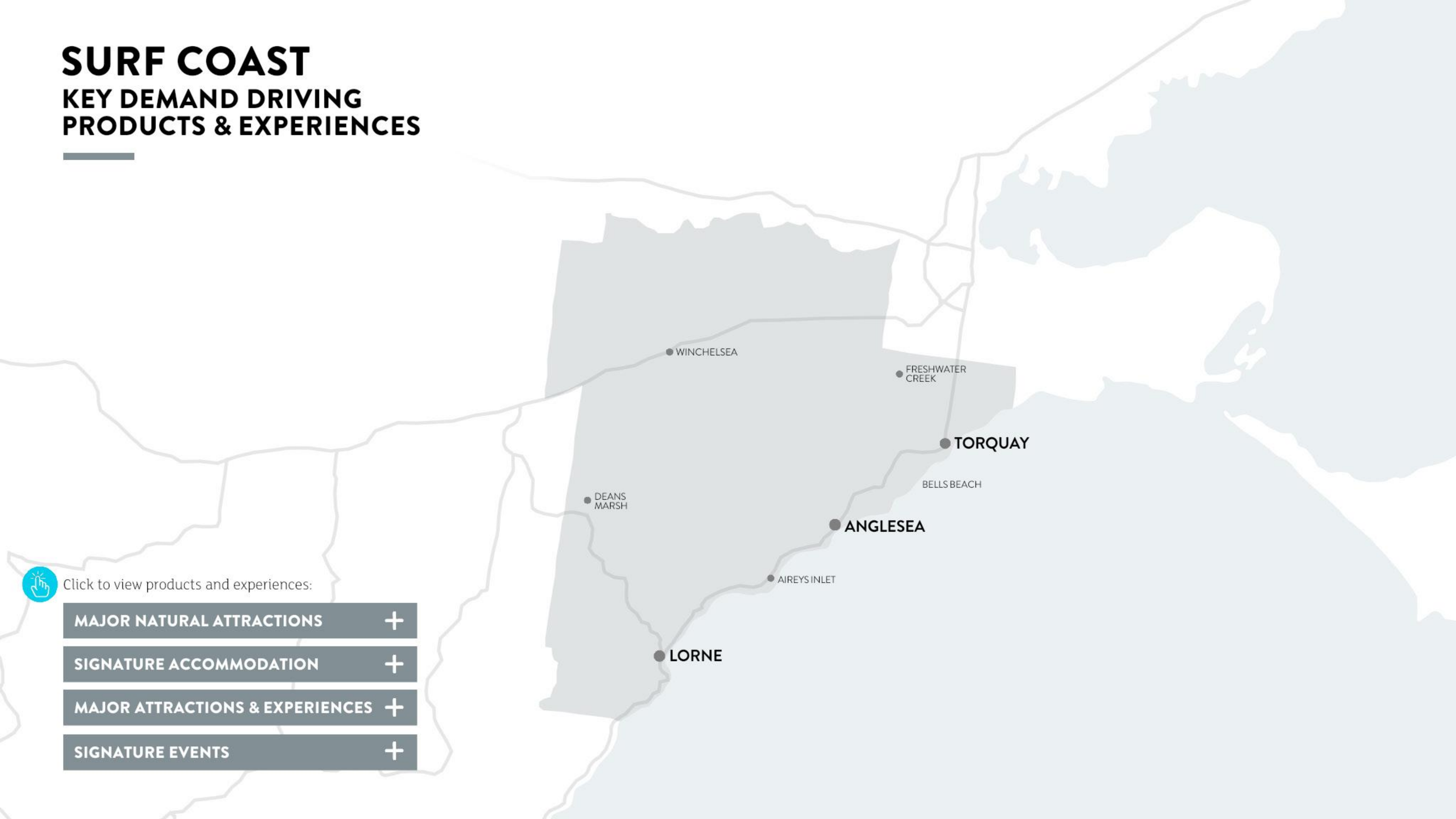
## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES



# SURF COAST

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES

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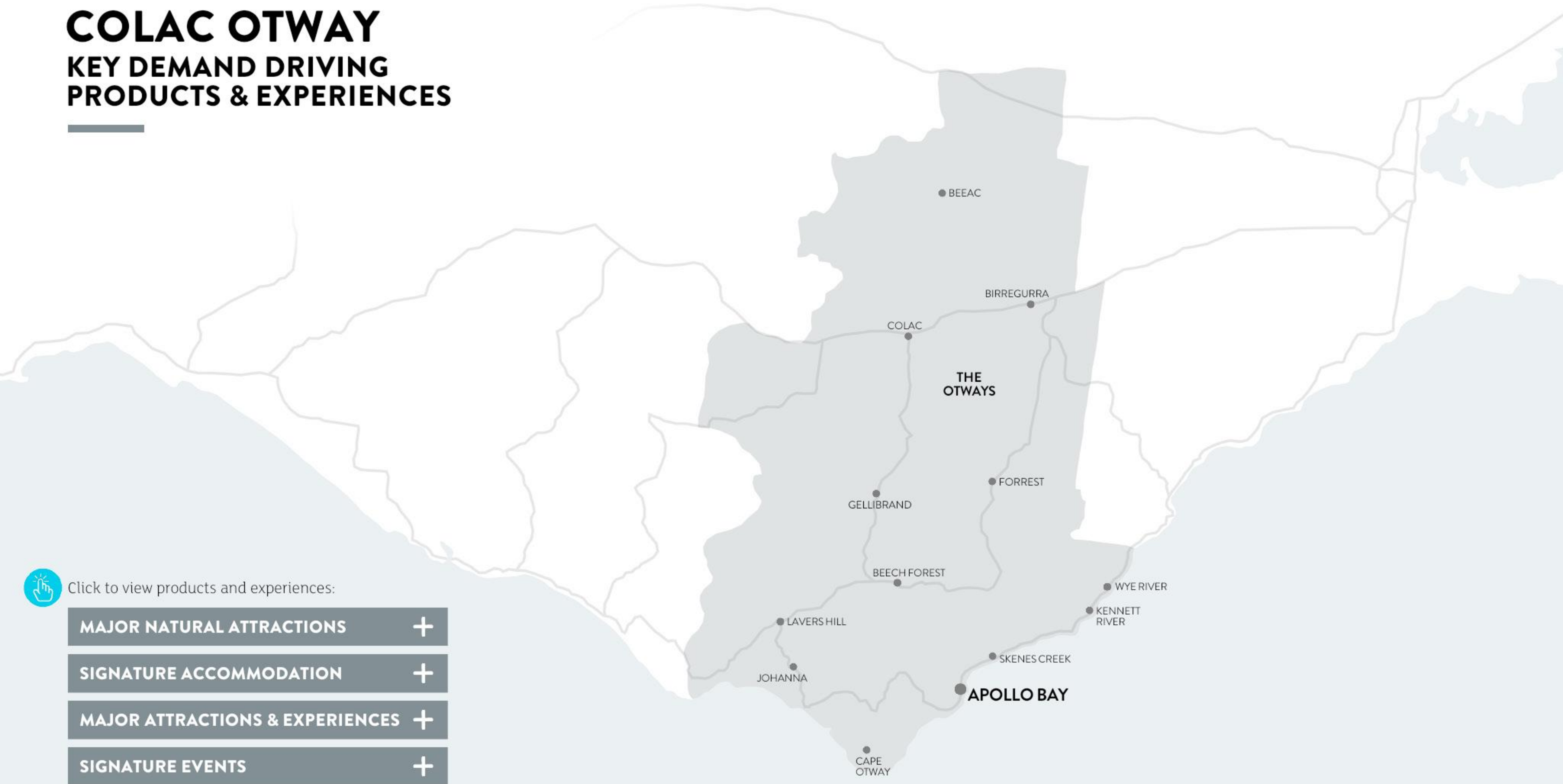
Click to view products and experiences:

- MAJOR NATURAL ATTRACTIONS +
- SIGNATURE ACCOMMODATION +
- MAJOR ATTRACTIONS & EXPERIENCES +
- SIGNATURE EVENTS +

# COLAC OTWAY

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES

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Click to view products and experiences:

**MAJOR NATURAL ATTRACTIONS**



**SIGNATURE ACCOMMODATION**



**MAJOR ATTRACTIONS & EXPERIENCES**



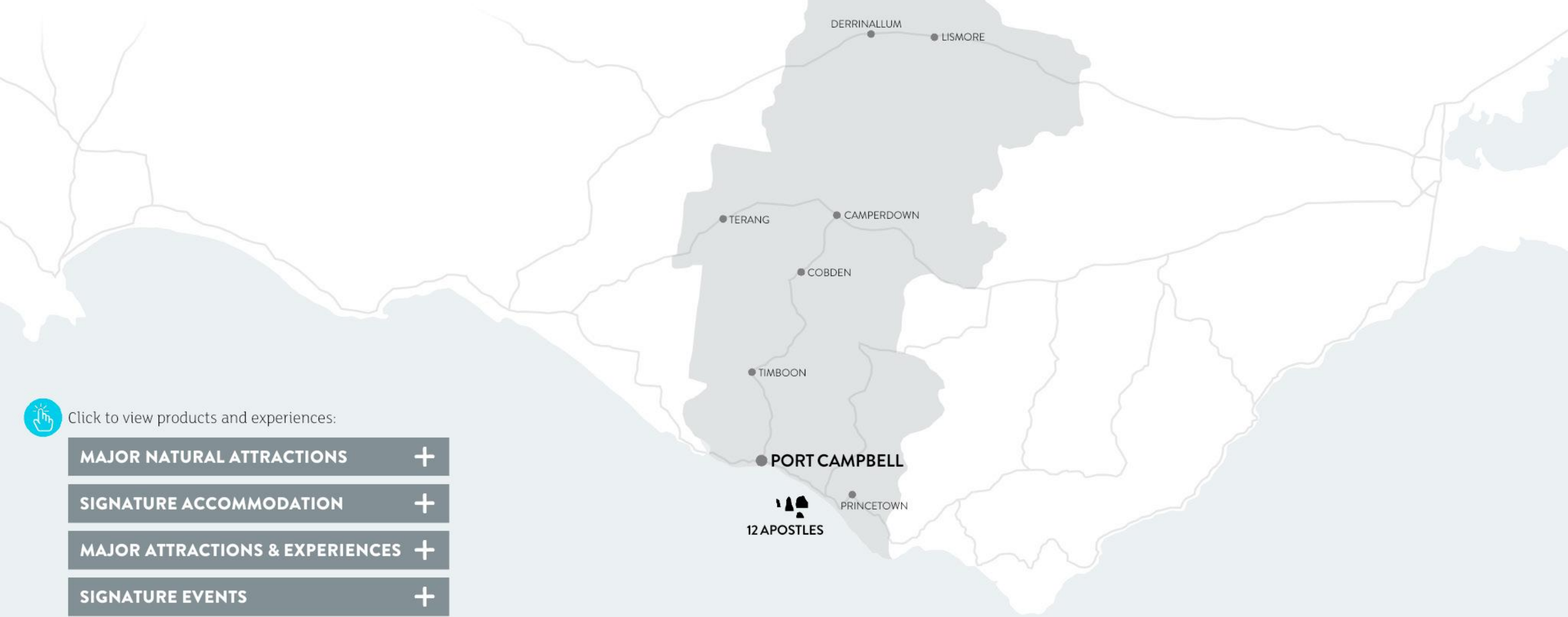
**SIGNATURE EVENTS**



# CORANGAMITE

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES

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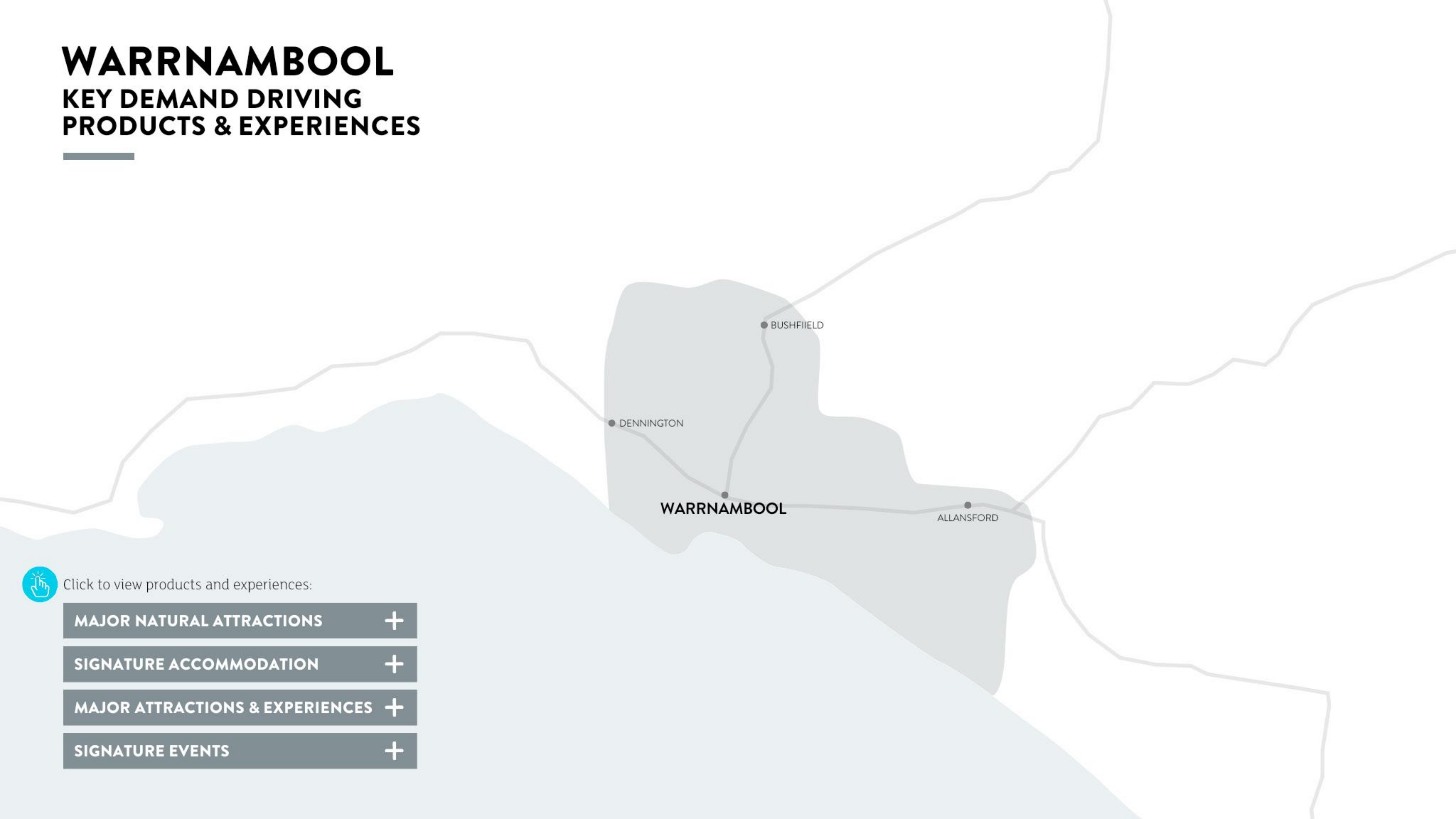
Click to view products and experiences:

- MAJOR NATURAL ATTRACTIONS +
- SIGNATURE ACCOMMODATION +
- MAJOR ATTRACTIONS & EXPERIENCES +
- SIGNATURE EVENTS +

# WARRNAMBOOL

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES

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Click to view products and experiences:

**MAJOR NATURAL ATTRACTIONS**



**SIGNATURE ACCOMMODATION**



**MAJOR ATTRACTIONS & EXPERIENCES**

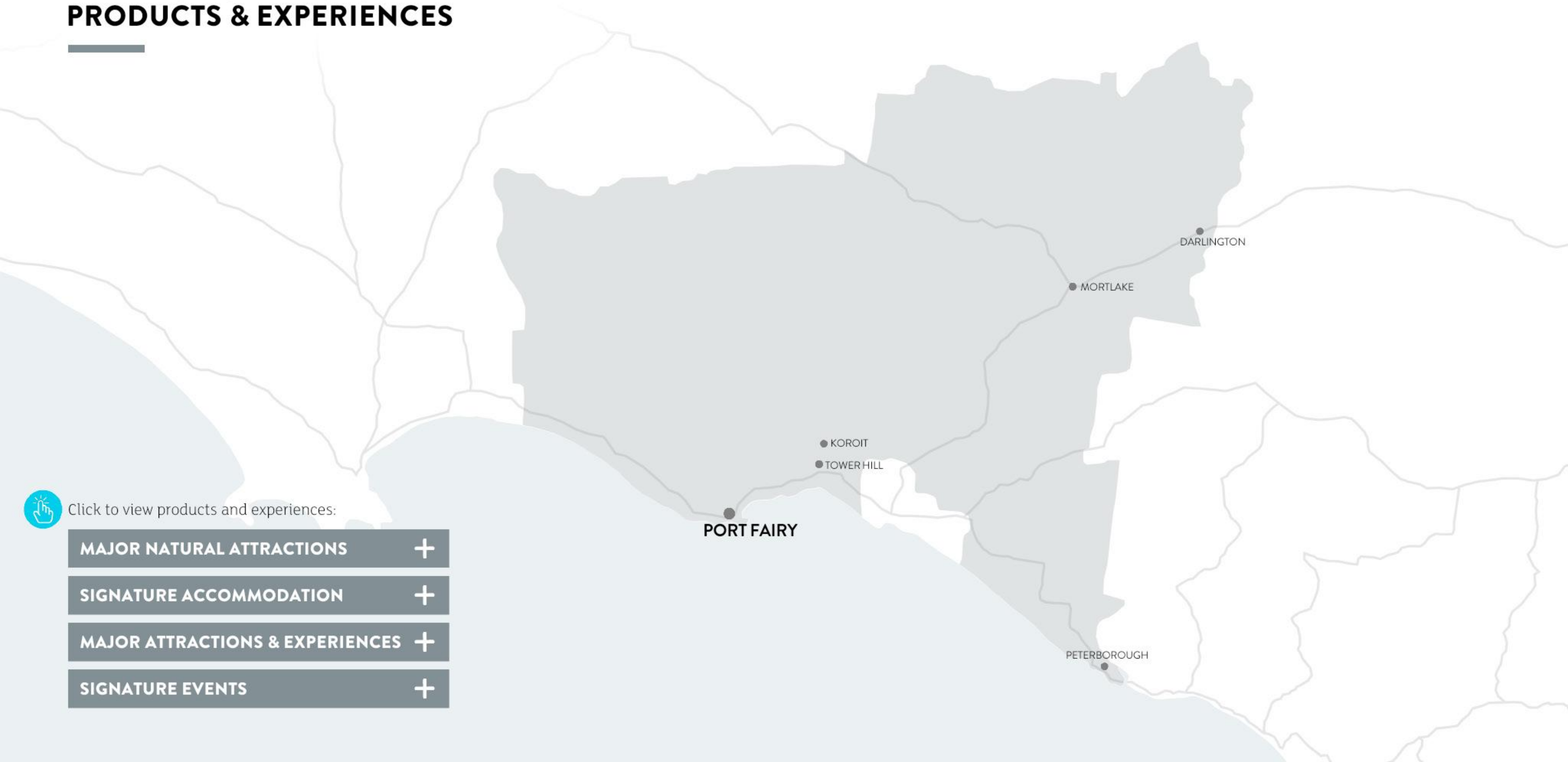


**SIGNATURE EVENTS**



# MOYNE

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES



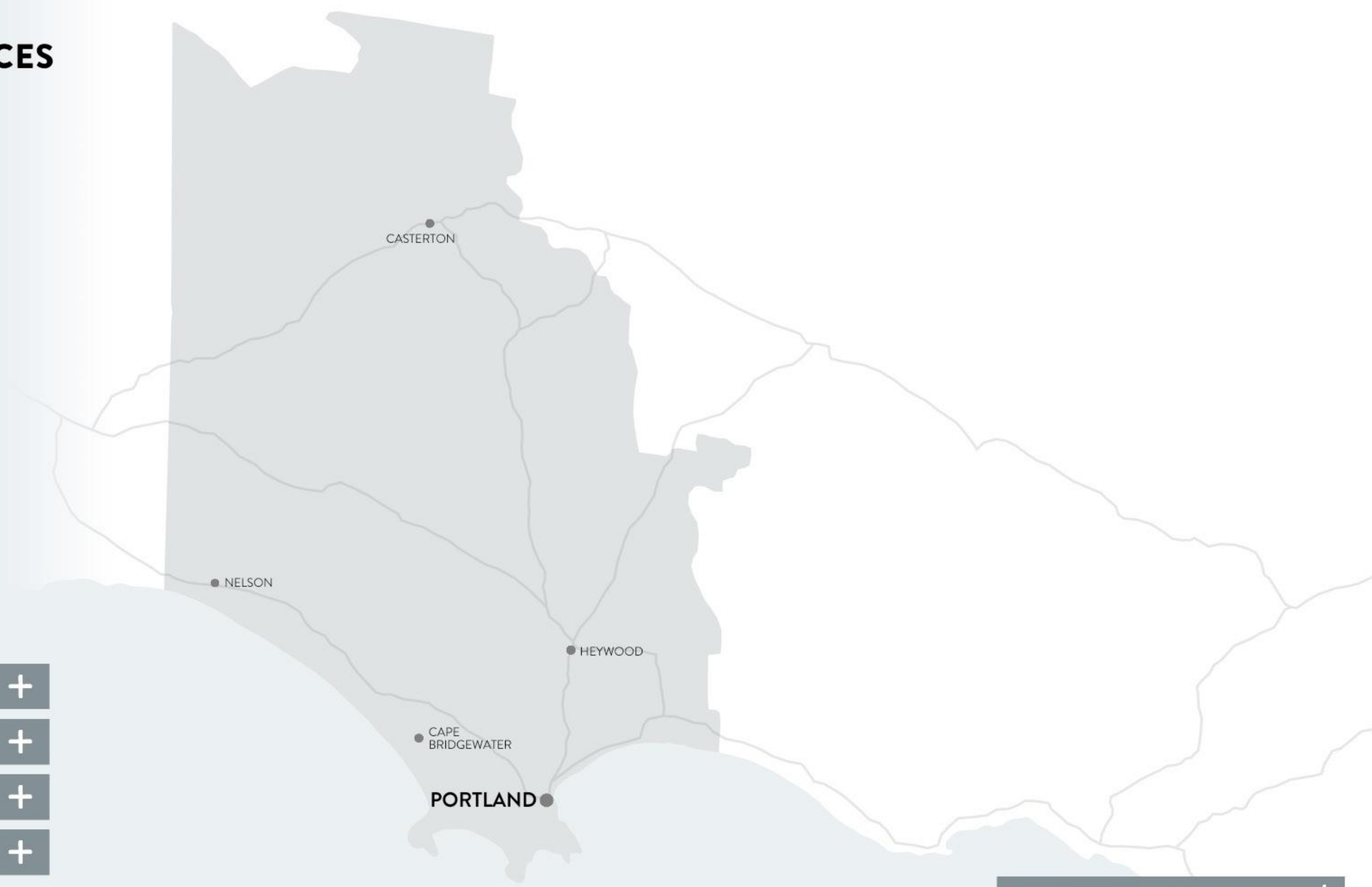
Click to view products and experiences:

- MAJOR NATURAL ATTRACTIONS +
- SIGNATURE ACCOMMODATION +
- MAJOR ATTRACTIONS & EXPERIENCES +
- SIGNATURE EVENTS +

# GLENELG

## KEY DEMAND DRIVING PRODUCTS & EXPERIENCES

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Click to view products and experiences:

**MAJOR NATURAL ATTRACTIONS**



**SIGNATURE ACCOMMODATION**



**MAJOR ATTRACTIONS & EXPERIENCES**



**SIGNATURE EVENTS**



**SUGGESTED SECTIONS TO READ NEXT**



S5  
RECENT PRODUCT  
DEVELOPMENT



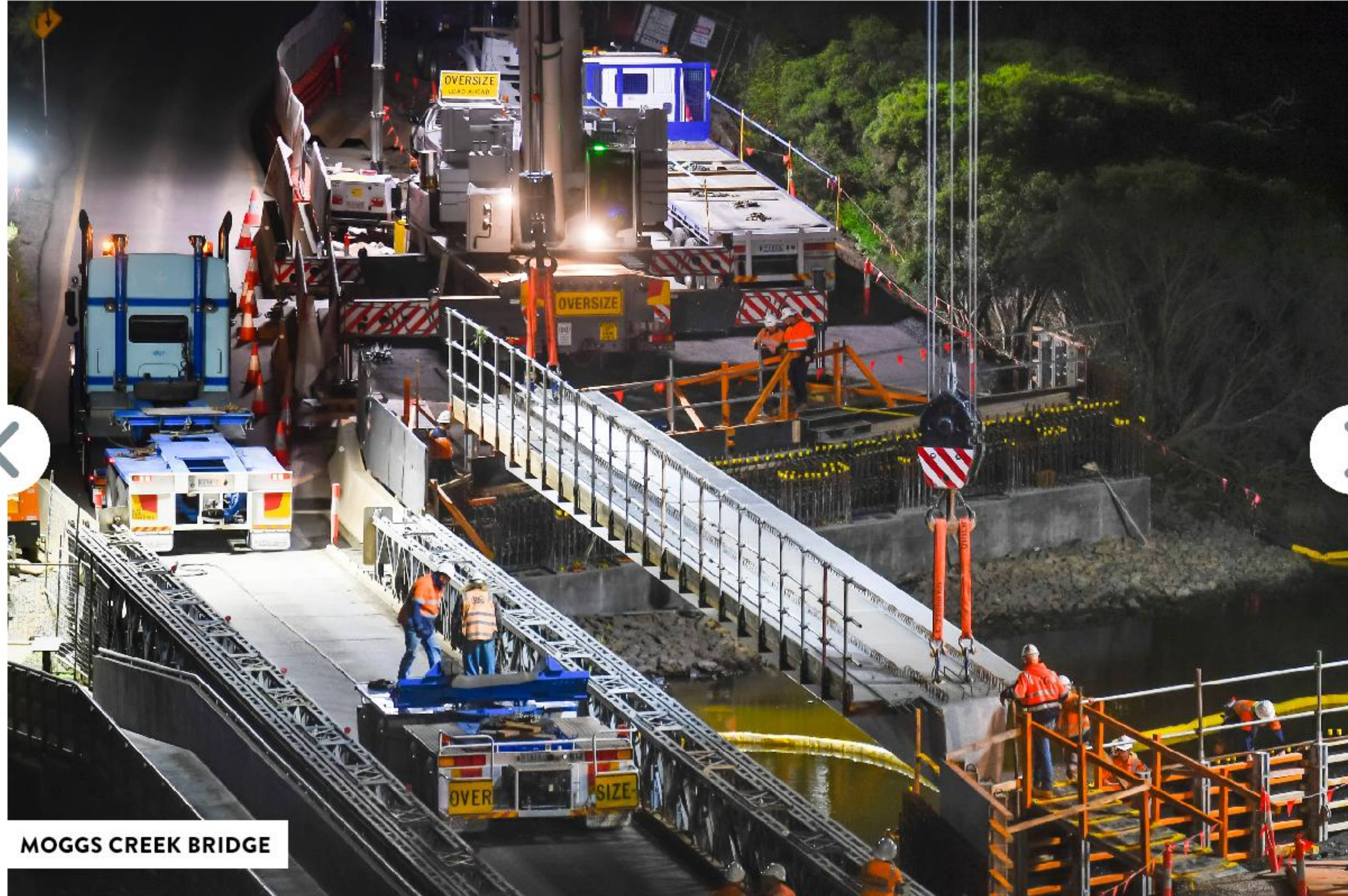
# COMPLETED PROJECTS

## RECENT PRODUCT DEVELOPMENT

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Click arrows to view recently completed projects:



**MOGGS CREEK BRIDGE**

| S6  
INVESTMENT PIPELINE

GREAT  
OCEAN  
WALK

# INVESTMENT PIPELINE

## CURRENT STATE ANALYSIS

### PUBLIC INFRASTRUCTURE

The 2015-2025 Strategic Master Plan to the Visitor Economy of the Great Ocean Road identified the need for \$1B investment (public and private) to meet current demand.

By 2020 an investment pipeline of \$1.5b public and private projects has been achieved and in addition over \$200m has been completed.

However, the 2015-2025 Strategic Master Plan was framed on the basis of current visitation data and forecasts in 2012. These forecasts of demand proved far too conservative, as visitation increased dramatically by 2018/19 (by 40%) increase so that the need for investment grew far more than was envisaged in the former Master Plan.



**AN INVESTMENT PIPELINE  
OF \$1.5B PUBLIC AND  
PRIVATE PROJECTS WAS  
ACHIEVED BY 2020**



Click arrows to view public infrastructure projects:



# INVESTMENT PIPELINE

## PUBLIC INFRASTRUCTURE



# INVESTMENT PIPELINE

## PRIVATE INFRASTRUCTURE

---



Click arrows to view private infrastructure projects:



CAPE BRIDGEWATER

# INVESTMENT PIPELINE

## PRIVATE INFRASTRUCTURE



Click to view projects:

- LEVEL 1** Catalyst Regional Projects +
- LEVEL 2** Priority Regional Projects +
- LEVEL 3** Priority Destination Projects +
- LEVEL 4** Product Development Opportunities +
- READ MORE** +

**SUGGESTED SECTIONS TO READ NEXT** +

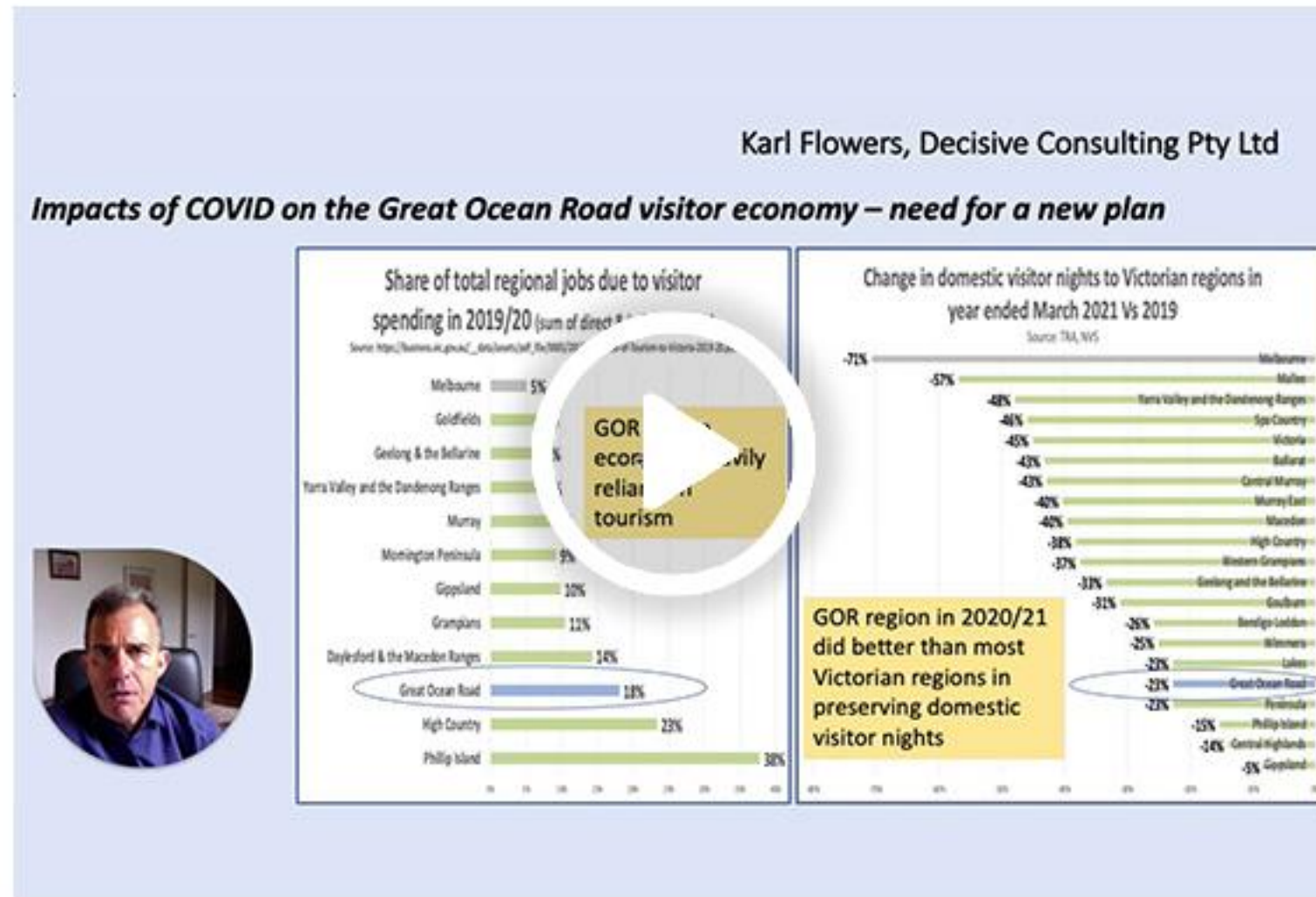
| S7  
RESPONDING TO COVID

GREAT OCEAN ROAD



# COVID RECOVERY SCENARIOS

## RESPONDING TO COVID



The COVID Pandemic will have major implications for the visitor economy and visitation over the next 3-5 years and increases uncertainty over forecasting the path to recovery.

The plan has recognised this uncertainty by producing two updated to April 2021 scenario based forecasts for recovery and insights on how recovery by visitor economy sectors and markets is expected to occur. The closure of national borders and restrictions on domestic travel and operations has drastically impacted visitation. Increased competition from interstate destinations seeking to mitigate against the loss of international visitation is also a threat to the region.

More positively, the visitor mix across the Great Ocean Road will support its recovery including the strength of domestic intrastate overnight and domestic day trip visitors. Lesser reliance on business travel is also expected to help the region as this travel is expected to recover more slowly than leisure travel as companies substitute online for face-to-face gatherings.

Less positively, more of the regional visitation is focused on weekends with mid-weeks much worse than usual, fostering profitless volume for many operators.

Two scenarios for GOR region visitor economy recovery from COVID impacts to end 2022/23:

|   | 1. OPTIMISTIC RECOVERY |         |         | 2. SLOWER RECOVERY |         |         |
|---|------------------------|---------|---------|--------------------|---------|---------|
| ASSUMPTIONS   | 2020/21                | 2021/22 | 2022/23 | 2020/21            | 2021/22 | 2022/23 |
| Change in GOR Region Visitor economy direct tourism spending (after inflation) and visitor economy jobs compared to 2018/19 | -26%                   | -10%    | -3%     | -36%               | -21%    | -9%     |
| Change in year average total GOR region jobs due to visitor spending compared to the 13,087 jobs in 2018/19                 | (3,403)                | (1,309) | (393)   | (4,711)            | (2,748) | (1,178) |

**WATCH** > Karl Flowers, Decisive Tourism Consulting.

Read the Impacts of the COVID Recession on the Great Ocean Road Region Visitor Economy and its Path to Economic Recovery report here:

**IMPACTS OF THE COVID RECESSION**



Source: Karl Flowers, Decisive Tourism Consulting, April 2021.

# FASTER SCENARIO

## COVID RECOVERY PLAN

Measures of a faster recovery - forecast GOR returning to pre-COVID visitor spending by early 2023:

| MEASURE<br>(AFTER INFLATION FOR TSA \$ MEASURE)                               | BASE YEAR<br>2018/19 ESTIMATE | 2020/21 | 2021/22 | 2022/23 |
|---|-------------------------------|---------|---------|---------|
| <b>TRA activity measure (000s)</b>  |                               |         |         |         |
| Domestic day trips  | 3,691                         | 2,953   | 3,506   | 3,876   |
| Domestic intrastate visitor nights  | 5,994                         | 5,015   | 5,531   | 5,754   |
| Domestic interstate visitor nights  | 1,006                         | 347     | 846     | 900     |
| International visitor nights  | 977                           | 210     | 491     | 826     |
| International day trips (staying outside GOR)                                 | 806                           | 81      | 282     | 564     |
| <b>TSA based economic impact measures</b>                                     |                               |         |         |         |
| Tourism consumption (spending on goods/services) \$m                          | \$1,912                       | \$1,415 | \$1,721 | \$1,855 |
| Gross Regional Product (due to direct impact of visitor spend) \$m            | \$586                         | \$434   | \$527   | \$568   |
| GRP total impact (direct + indirect effect) of visitor spend \$m              | \$1,145                       | \$847   | \$1,031 | \$1,111 |
| Jobs due to direct tourism spend (year average)                               | 9,802                         | 7,253   | 8,822   | 9,508   |
| Jobs due to total impacts (direct + indirect) of visitor spend (year average) | 13,087                        | 9,684   | 11,778  | 12,694  |

**Sources:** TRA Online and TRA TSA for base year estimates.  
Decisive Consulting for forecasts for 2020/21 to 2022/23.

# SLOWER SCENARIO

## COVID RECOVERY PLAN

Measures of a slower recovery - forecast GOR returning to pre-COVID visitor spending by early 2023:

| MEASURE<br>(AFTER INFLATION FOR TSA \$ MEASURE)                               | BASE YEAR<br>2018/19 ESTIMATE | 2020/21 | 2021/22 | 2022/23 |
|---|-------------------------------|---------|---------|---------|
| <b>TRA activity measure (000s)</b>  |                               |         |         |         |
| Domestic day trips  | 3,691                         | 2,584   | 3,137   | 3,691   |
| Domestic intrastate visitor nights  | 5,994                         | 4,416   | 4,932   | 5,454   |
| Domestic interstate visitor nights  | 1,006                         | 224     | 773     | 846     |
| International visitor nights  | 977                           | 110     | 294     | 682     |
| International day trips (staying outside GOR)                                 | 806                           | 40      | 202     | 443     |
| <b>TSA based economic impact measures</b>                                     |                               |         |         |         |
| Tourism consumption (spending on goods/services) \$m                          | \$1,912                       | \$1,224 | \$1,510 | \$1,740 |
| Gross Regional Product (due to direct impact of visitor spend) \$m            | \$586                         | \$375   | \$463   | \$533   |
| GRP total impact (direct + indirect effect) of visitor spend \$m              | \$1,145                       | \$733   | \$905   | \$1,042 |
| Jobs due to direct tourism spend (year average)                               | 9,802                         | 6,273   | 7,744   | 8,920   |
| Jobs due to total impacts (direct + indirect) of visitor spend (year average) | 13,087                        | 8,376   | 10,339  | 11,909  |

**Sources:** TRA Online and TRA TSA for base year estimates.  
Decisive Consulting for forecasts for 2020/21 to 2022/23.

# STRATEGIC RESPONSE

## BUILD - DEVELOP - ACCELERATE



# RECOVERY PROGRAM

## AMPLIFIED AND ENHANCED DELIVERY

GORRT has developed a recovery program to amplify and enhance delivery of an integrated program across the core industry pillars of industry development, marketing, infrastructure and product development and management.

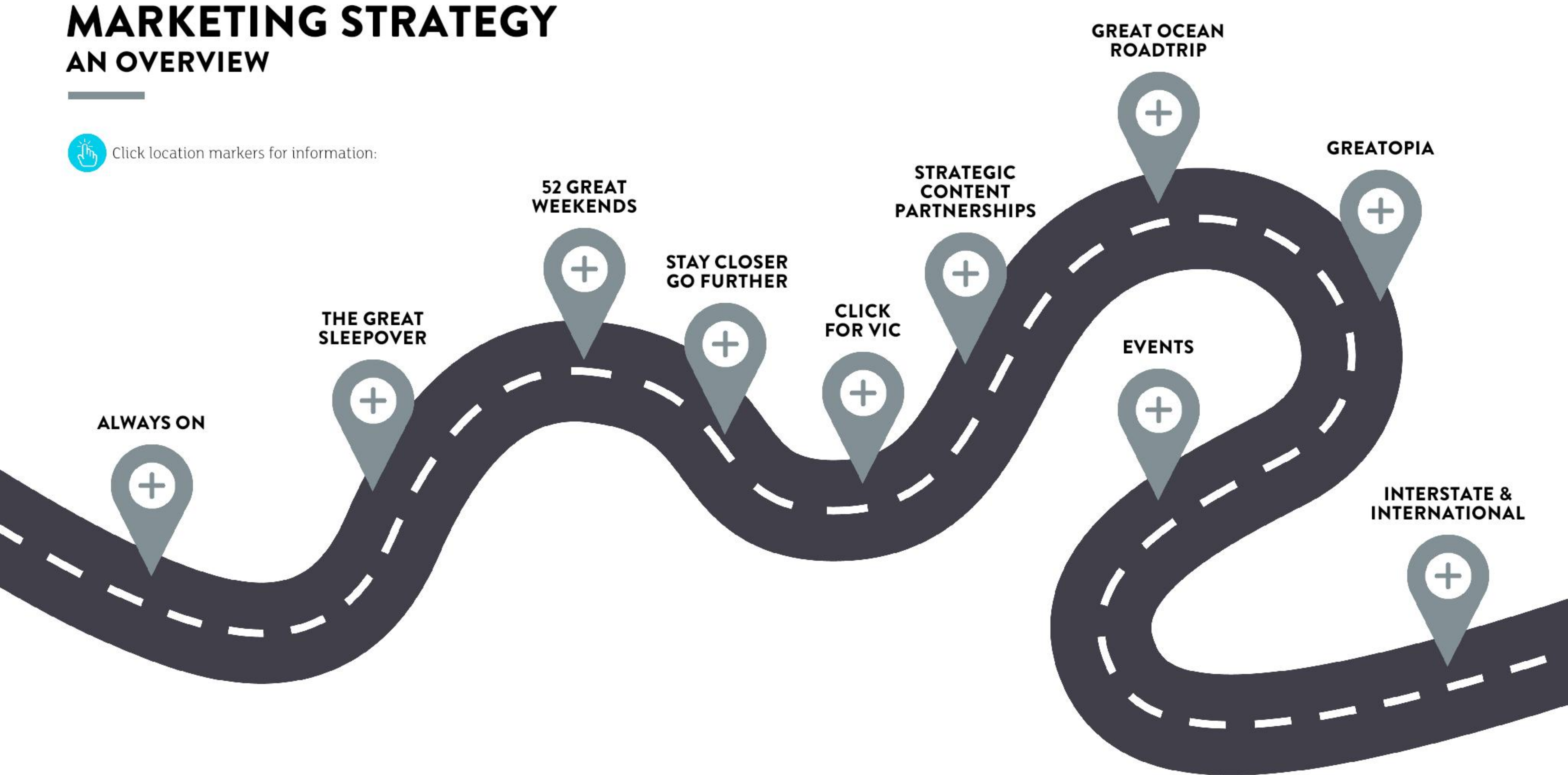


# MARKETING STRATEGY

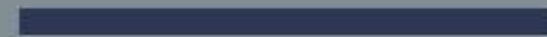
## AN OVERVIEW



Click location markers for information:



**PART B**  
**THE FUTURE**



S8  
DETERMINING PRIORITIES



# STRENGTHS

## THINGS WE'RE GREAT AT

---

### **Brand**

The region has strong international and national brand recognition.

### **Diversified visitor market**

The region has a diversified visitor market by both origin and type.

### **Big natural attractions**

The region has a breadth of world class big nature, landscape and wildlife experiences.

### **Strong investment pipeline**

The region has a strong pipeline of public and private sector projects, across the entire region, including projects of national and international significance that will drive new markets, length of stay, dispersal and expenditure.

### **World heritage investment**

World Heritage listed Budj Bim and investment in development of the visitor experience.

### **Breadth of high quality fishing**

The region offers world class tuna, crayfish, abalone fishing and has significant inland waterways for recreational fishing.

### **Tracks and trails**

The region has a growing collection of iconic tracks and trails – from hero walks such as Great Ocean Walk, Surf Coast Walk and Great South West Walk to mountain biking – Forrest and Anglesea and rail trails ie. Camperdown to Timboon, Port Fairy to Warrnambool.

### **Strong visitation**

The region has strong, growing visitation to key icons.

### **Events**

The region has an annual Calendar of significant events including Cadel Evans GOR Race, Race Torquay, Pier to Pub, Falls Festival, GOR Running Festival, Apollo Bay Seafood Festival, Port Fairy Folk Festival, May Race Carnival, Casterton Kelpie Muster.

### **Avalon Airport**

Having an international airport at the gateway to the region provides the region with the chance to access interstate and international markets.

### **Access to and capacity to draw South Australia**

Proximity to the SA border presents an opportunity for cross border collaboration to grow visitation.

SWOT >

**STRENGTHS**

WEAKNESSES

OPPORTUNITIES

THREATS

# WEAKNESSES

## WHERE WE FALL SHORT

---

### **High visitation and low yield**

The region has enjoyed significant growth in visitation over the past five years, including significant increases in day trip visitation especially international day trip visitors, however this has not translated to an equivalent rise in expenditure.

### **High seasonality**

The region is heavily dependent on the peak summer season for visitation and yield.

### **Limited geographical dispersal**

There is a heavy concentration of visitors to the east of the region and along the coast critical to the regions long term viability is extending the journey across the whole region.

### **Visitor experience**

The quality of the visitor experience is negatively impacted by the lack of investment in the maintenance and renewal of visitor infrastructure and congestion in peak periods.

### **Industry collaboration and engagement**

Industry engagement in local tourism and trader organisations and the RTB have been in decline – building a collaborative model will amplify the region’s brand and support objective of increased length of stay.

### **Limitations of visitation data**

Current visitation data is limited and fails to capture key visitor behaviour etc. including international day trip visitation, accommodation data.

### **Lack of enabling infrastructure to support visitation levels, business operation, product development and enhancement**

Significant investment is required in building a region that can cater for growing visitor numbers and offer quality experiences including roads, water and waste management, digital connectivity.

### **Transport linkages**

Access within region is extremely limited if not travelling by own vehicle. Alternate transport options are critical to a more sustainable approach.

# OPPORTUNITIES

## HOW WE CAN IMPROVE

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### **Implementation of the Great Ocean Road Action Plan and establishment of the Great Ocean Road Coast and Parks Authority**

#### **Pipeline of public and private investment**

The pipeline of public and private sector investments, large and small will change the shape of the region, increase competitiveness and grow new audiences.

#### **Investment Attraction**

Game changer/catalyst public and private sector investment will stimulate increased investment in support products, experiences and services.

#### **Visitor servicing**

Investment in visitor servicing will support increasing length of stay and expenditure from existing visitors and stimulate repeat visitation and creation of ambassadors.

#### **Product development**

Development of products, experiences and services that support attraction of the right type of visitors and behavior and celebrate our natural attractions.

### **Reduced international coach visitors**

Reduced numbers of international coach visitors could improve the visitor experience at iconic locations and provide an incentive for domestic visitors.

### **Population growth in Greater Western Melbourne and Greater Geelong**

The growing population presents new market opportunities for emerging Destinations and the migrant population presents an opportunity to create lifelong connections.

### **Climate response**

Promoting the region's strategies for climate adaption may open new markets.

### **Transport links**

The region has the opportunity to benefit from investment in improved transport infrastructure with the fast train to Geelong and Warrnambool and future investment in airport links.

### **Leveraging the Geelong City Deal**

The Geelong City Deal has provided a significant injection into much needed infrastructure for the region and provides a mechanism for ongoing development.

### **Aboriginal product development**

The region has developed an Aboriginal Product Development Strategy and is committed to supporting our Traditional Owners. The World Heritage recognition of the Budj Bim landscape and planned investment will be a catalyst project for the region.

Read the Aboriginal Product Development Strategy here:

[OUR COUNTRY; OUR PLAN](#)



[READ MORE](#)



# THREATS

## CHALLENGES WE FACE

---

### **Variable customer service**

Peak visitation and workforce challenges reduces the capacity of the region to deliver quality customer service.

### **Public managed visitor assets**

A lack of adequate government investment in the maintenance and renewal of publicly-managed visitor assets has resulted in a sub-standard experiences.

### **Community engagement and support for tourism**

Community frustration at the lack of maintenance and renewal of public infrastructure and services, to support growing visitor numbers, has reduced support for the tourism sector.

### **Climate change**

The region must actively address the threat of climate change.

### **Population growth in Greater Western Melbourne and Greater Geelong**

The growing Western Melbourne & Greater Geelong populations will continue to drive visitation especially to the coast at the eastern end of the region.

### **Volatility and economic viability of micro and small businesses**

The complete disruption from COVID has highlighted the volatility and sustainability of micro and small businesses across the region exacerbated by the high level of seasonality.

### **Increased competition for core markets**

COVID has disrupted the traditional markets and there will be an increased level of marketing to attract our core market away from the region.

### **Increased competition for discretionary spend**

The economic impacts of COVID could contract some key markets and see a shift from, overnight to day trips.

### **Speed to implementation of investment in key projects**

Progressive implementation does not deliver optimum visitor experience.

### **Process to drive public investment delivering a sub-optimum outcome**

Process does not optimise the investment or the opportunity to change the types of visitors attracted to the region.

### **Heightened anti-tourism sentiment**

Impact on social licence.

### **Implications of bushfire**

On planning and development, on sustainability of events.

### **Workforce attraction**

Capacity to attract, retain, transport and house staffing is severely impacting on the capacity of the region to be open 7 days a week and deliver on visitor expectations.

### **Profitless volume**

Development of product that stimulates increased growth in low yielding visitor segments.

SWOT > STRENGTHS WEAKNESSES OPPORTUNITIES **THREATS**

SUGGESTED SECTIONS TO READ NEXT +



S9  
SUPPLY-SIDE FOCUS

# SUPPLY-SIDE FOCUS

## DEVELOPMENT - GAP - DEMAND

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### **New and improved product**

Product development is key to changing consumer behaviour – driving increased length of stay, dispersal and yield and attracting new higher yielding audiences.

### **Address product gaps**

The region has a strong investment pipeline in both public and private sector infrastructure projects/product development but significant product gaps remain.

### **Products that enhance and enrich the visitor experience**

Critical is ensuring that the focus is not solely on large scale game changing infrastructure projects but that products, services and experiences that support visitor needs and wants are addressed.

### **Build competitiveness**

The region has significant gaps in accommodation, attractions, experiences and food to compete with other key Victorian and interstate destinations. Whilst some product development has occurred in recent years, more is needed even before taking into account the impact of COVID.

### **Enhance overnight value proposition**

Critical are products that support the night-time economy and drive overnight stays and non-weather dependent activity that supports year-round visitation.

### **Maintain and grow signature event base**

Events continue to play a key role in driving visitation although the capacity of communities to continue to drive events is diminishing with event funding becoming increasingly difficult to obtain.

### **ACCOMMODATION DEMAND**

Deloitte Access Economics undertook an Accommodation Supply & Demand study in 2019 as part of the Great Ocean Road Action Plan Implementation to assess accommodation supply given forecast growth scenarios for visitation through to 2030. The study identified an accommodation gap of 3,869 rooms with no change in current occupancy or 2,715 rooms with increased occupancy.

The largest growth was in hotels, self-contained and hosted properties followed by caravan parks.

Read the full Deloitte Access Economics study here:

[ACCOMMODATION STUDY](#)



# ACCOMMODATION DEMAND

## VISITOR ACCOMMODATION FORECAST

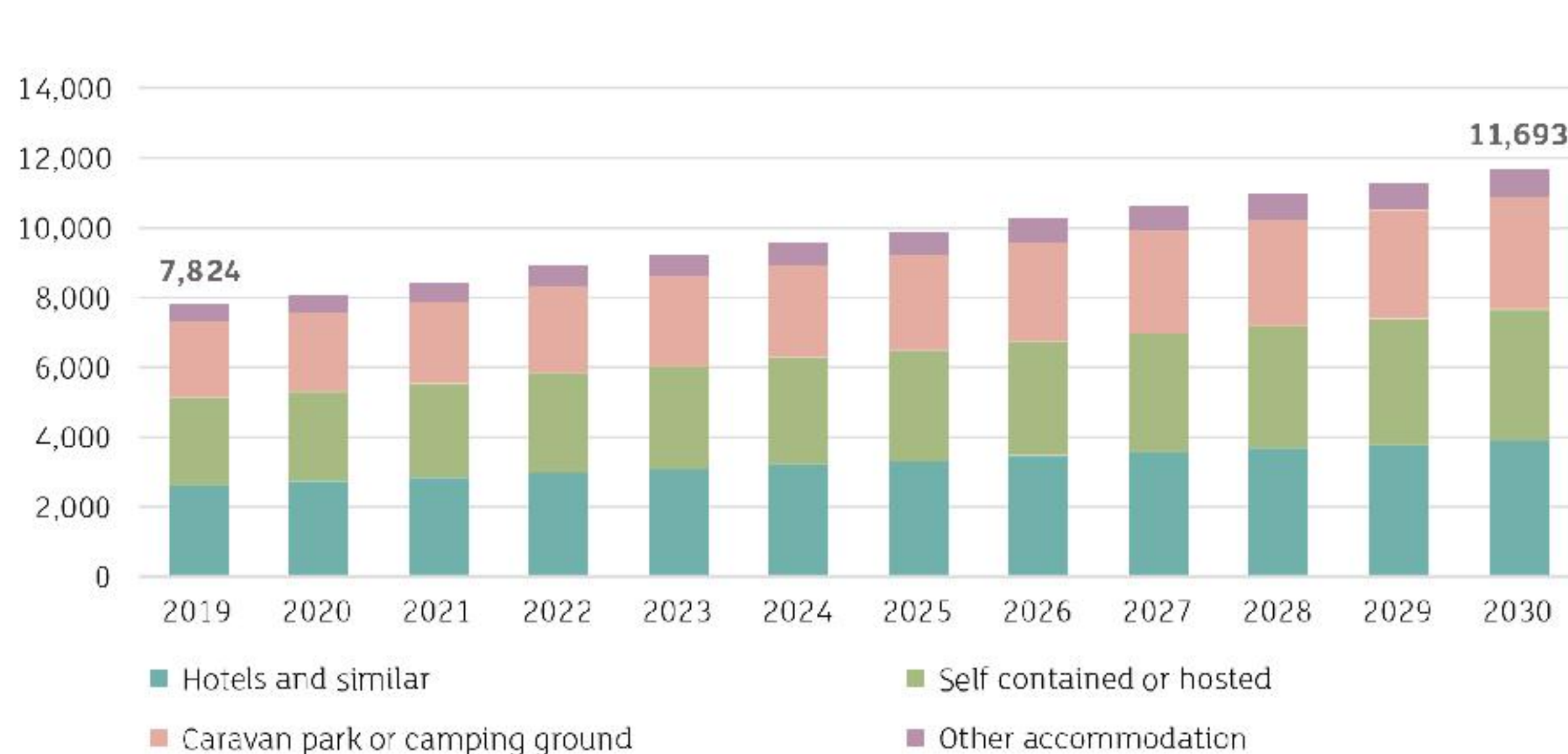
Forecast room requirements and growth rate in Great Ocean Road, constant occupancy:

| TYPE                     | FY2019       | FY2030        | OCCUPANCY RATE BY FY2030 | ADDITIONAL ROOMS | FY2019-2030 CAGR |
|--------------------------|--------------|---------------|--------------------------|------------------|------------------|
| Hotels                   | 2,634        | 3,920         | 57.5%                    | 1,286            | 3.7%             |
| Self-contained or hosted | 2,488        | 3,740         | 40.0%                    | 1,252            | 3.8%             |
| Caravan parks            | 2,209        | 3,238         | 61.0%                    | 1,029            | 3.5%             |
| Others                   | 494          | 795           | 41.7%                    | 302              | 4.4%             |
| <b>Total</b>             | <b>7,824</b> | <b>11,693</b> | <b>52.4%</b>             | <b>3,869</b>     | <b>3.7%</b>      |

Forecast room requirements and growth rate in Great Ocean Road, improved occupancy:

| TYPE                     | FY2019       | FY2030        | OCCUPANCY RATE BY FY2030 | ADDITIONAL ROOMS | FY2019-2030 CAGR |
|--------------------------|--------------|---------------|--------------------------|------------------|------------------|
| Hotels                   | 2,634        | 3,578         | 63.0%                    | 944              | 2.8%             |
| Self-contained or hosted | 2,488        | 3,288         | 45.5%                    | 800              | 2.6%             |
| Caravan parks            | 2,209        | 2,970         | 66.5%                    | 762              | 2.7%             |
| Others                   | 494          | 702           | 47.2%                    | 209              | 3.3%             |
| <b>Total</b>             | <b>7,824</b> | <b>10,538</b> | <b>55.5%</b>             | <b>2,715</b>     | <b>2.7%</b>      |

Forecast room requirements in Great Ocean Road, constant occupancy:








Forecast room requirements in Great Ocean Road, improved occupancy:








# FUTURE STATE STRATEGY

## PRODUCT GAP ANALYSIS

| REGION              | PRODUCT GAP  |   |   |   |  | OVERVIEW OF PRODUCT DEVELOPMENT OPPORTUNITIES   |
|---------------------|--|---|---|---|--|---|
|                     | <br>ACCOMMODATION | <br>FOOD | <br>ATTRACTIONS | <br>EVENTS | <br>EXPERIENCES |   |
| <b>Torquay</b>      | X  |   | X   | X   | X  | Torquay has seen a growth in cafés and restaurants and an increase in attractions with the opening of a number of boutique breweries, new retail and experiences however there remains a gap in accommodation, attractions especially attractions that support the night economy and non weather dependent activities. A number of creative experiences have developed recently but are not highly visible in the market place. Torquay has a strong reputation for hosting sporting events, especially participatory events and is looking to build on this reputation.  |
| <b>Anglesea</b>     | X  | X   | X   | X   | X  | Anglesea has a strong tourist park market and a significant holiday house and Air BandB offering. The past year has seen some growth in the food offering but additional cafes, restaurants and attractions are required to grow expenditure from day trippers and to encourage overnight stays. Anglesea has a strong creative industries sector and would benefit from this product being more visible as a visitor offering. The Anglesea Destination Action Plan identified the need for new products, events and experiences that would support them growing as an eco-tourism destination.  |
| <b>Aireys Inlet</b> |  |   | X   |   | X  | Aireys Inlet has developed a good food and cultural offering but is seeking additional events and greater town connectivity to ensure Aireys Inlet is positioned as a walking destination. Critical to the Aireys community is development of products and experiences that embrace the sense of community and supports the character of the town.  |
| <b>Lorne</b>        |  | X   | X   | X   | X  | Lorne provides a good breadth of accommodation but is generally at capacity in peak periods. New food offerings including Movidia and Coda are strengthening the Lorne brand as a cultural and foodie destination. Lorne is committed to the development of cultural events and is currently working to strengthen the Sculpture Biennale. The addition of Live Wire Park has enhanced the connection to the Otways and builds on the walks and waterfalls offering providing activities for all ages. Live Wire's plans to expand their offering will support increased length of stay and the event reputation for Lorne. Lorne would benefit from additional attractions that support the night-time economy and non weather dependent activities. |






# FUTURE STATE STRATEGY

## PRODUCT GAP ANALYSIS

| REGION               | PRODUCT GAP  |   |   |   |  | OVERVIEW OF PRODUCT DEVELOPMENT OPPORTUNITIES   |
|----------------------|--|---|---|---|--|---|
|                      | <br>ACCOMMODATION | <br>FOOD | <br>ATTRACTIONS | <br>EVENTS | <br>EXPERIENCES |   |
| <b>Apollo Bay</b>    | X  |   | X   | X   | X  | Apollo Bay is considered the midpoint for many visitors and needs additional accommodation to cater for international and interstate audiences looking for longer stays and serviced offerings. To capture increased length of stay it would benefit from more attractions/experiences with the harbour redevelopment a priority identified in the Destination Action Plan. Creation of products that create an immersive and connecting experience with locals is a priority including wellness, crayfish tours, walk product. To capture increased expenditure there is a need for additional food and beverage offerings and stronger retail especially access to local products. Additional product development opportunities include night-time activities festival programs, glow worms, sculpture walks etc. |
| <b>Port Campbell</b> | X  | X   | X   | X   | X  | Port Campbell has limited accommodation and limited food and retail offering to capture increased length of stay and expenditure. A lack of attractions and activities outside of the key natural attractions limits the need to stay multiple days, Development of immersive experiences and interpretative product could support attraction of new audiences and increased length of stay. The development of the artisan trail supports visitation to Port Campbell and surrounds. The 12 Apostles Coast and Hinterland Destination Action Plan identifies the need to enhance the region's product offering with a focus on growth and diversity in food and experience products and the creation of new nature-based products and experiences.   |
| <b>Peterborough</b>  | X  | X   |   |   | X  | Peterborough offers a breadth of natural attractions but suffers from a lack of product and experience to service visitors and give their stay to Peterborough. The key focus is on development of accommodation in keeping with Peterborough and food and experience offer.  |
| <b>Forrest</b>       | X  | X   |   |   | X  | Forrest mountain bike offering is being revitalized through the development of new trails and skills park. Additional accommodation, attractions and experiences will continue to enhance the product and experience of Forrest. The expansion of the Brewery identified in the investment pipeline could be supported by the development of the Forrest Gateway Project, group and boutique/eco accommodation and additional experiences and food offerings.   |

# FUTURE STATE STRATEGY

## PRODUCT GAP ANALYSIS

| REGION                           | PRODUCT GAP  |   |   |   |  | OVERVIEW OF PRODUCT DEVELOPMENT OPPORTUNITIES  |
|----------------------------------|--|---|---|---|--|--|
|                                  | <br>ACCOMMODATION | <br>FOOD | <br>ATTRACTIONS | <br>EVENTS | <br>EXPERIENCES |  |
| <b>Volcanic Lakes and Plains</b> | X  | X   |   |   | X  | Development of accommodation and the food offering in key towns is critical to growing attractiveness, length of stay and yield. There is significant opportunity to develop the experience including guided tours, events, and equipment hire.  |
| <b>Colac</b>                     | X  | X   | X   | X   | X  | Colac's position on the Princes Highway and its proximity to both Melbourne and Geelong provides enormous opportunity. Investment in new product and experiences is critical to shift leisure visitor consumption from being a wayside stop to a destination in its own right. A key challenge is the availability of weekend retail and food and beverage offerings.  |
| <b>Warrnambool</b>               |  |   | X   | X   | X  | The enhancement and revitalisation of the Flagstaff Hill Precinct and the cultural offering in Warrnambool presents an opportunity to appeal to new higher yielding markets outside of summer peak. Events deliver significant visitation to Warrnambool and there is a significant opportunity to develop and build on the event calendar. There is significant opportunity to enhance the foreshore, enhance the whale watching experience and develop products and experiences to support the development of wellness. The agri-tourism offering could support the development of new product and experiences, enhanced by the existing and growing food and night-time economy offering. |
| <b>Port Fairy</b>                |  |   | X   |   | X  | Port Fairy offers a breadth of accommodation and food and has a strong calendar of events with the Port Fairy Folk Festival, Port Fairy Jazz, Winter Weekends and Spring Music Festival. The Destination Action Plan seeks to see new product and experiences including wine and food trails, products, and experiences to support visitation to Tower Hill and the Budj Bim Cultural Landscape.   |

# FUTURE STATE STRATEGY

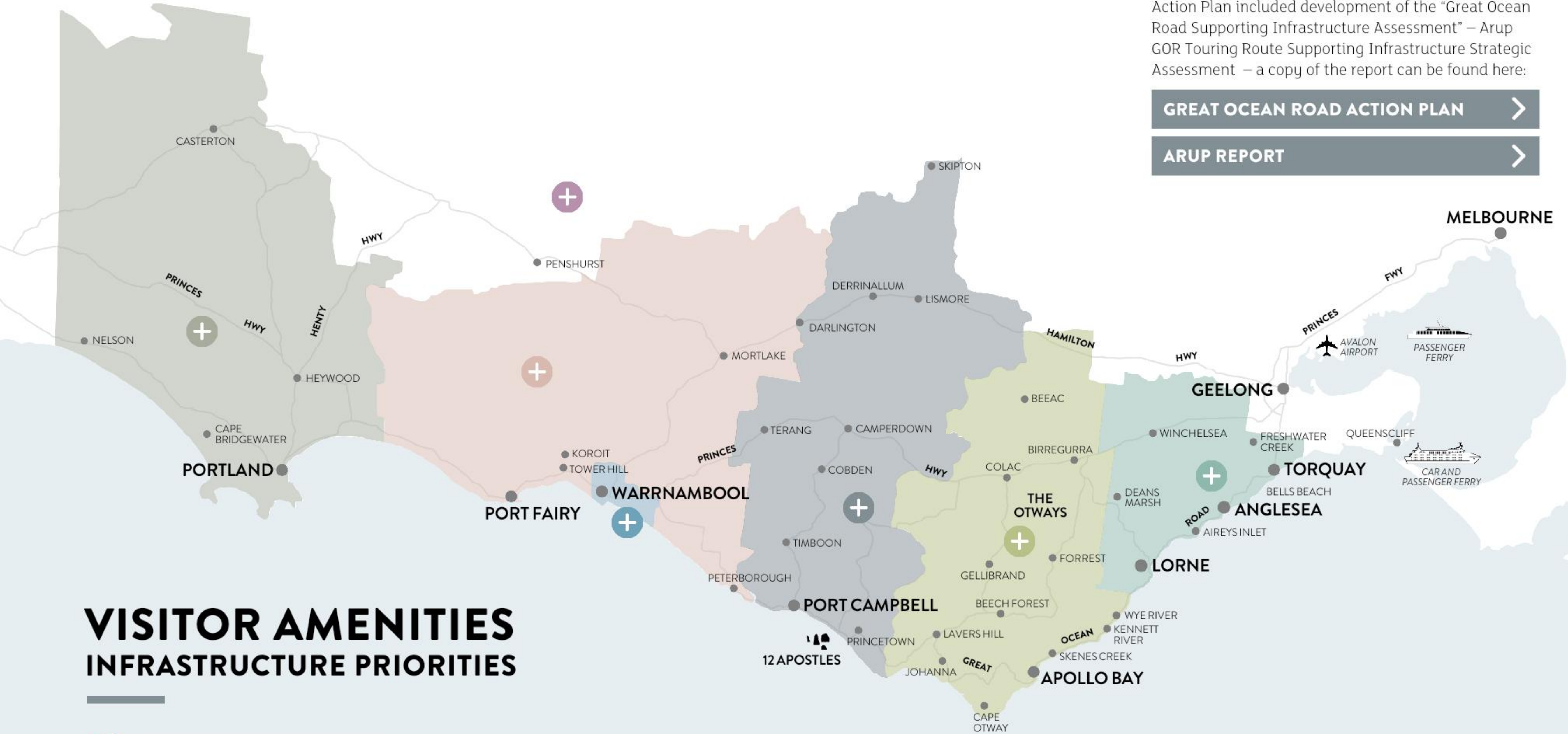
## PRODUCT GAP ANALYSIS

| REGION           | PRODUCT GAP  |   |   |   |  | OVERVIEW OF PRODUCT DEVELOPMENT OPPORTUNITIES  |
|------------------|--|---|---|---|--|--|
|                  | <br>ACCOMMODATION | <br>FOOD | <br>ATTRACTIONS | <br>EVENTS | <br>EXPERIENCES |  |
| <b>Portland</b>  | X  |   | X   | X   | X  | Portland needs to grow accommodation, products, services and experiences to target new audiences and to support planned investment in Budj Bim Cultural Landscape, the cruise market and to increased length of stay, dispersal and yield. Product development opportunities include creative arts products, café and restaurant offerings, attractions and experiences to support access to nature experiences and products to further enhance the whale watching experience. |
| <b>Casterton</b> | X  | X   |   |   | X  | Development of products and experiences to support growing Casterton as a destination and increasing local population. New products and experiences could include events, open art studios, tours. Public infrastructure priorities include the development of the rail trail, the railway precinct and street art development.  |
| <b>Nelson</b>    |  | X   |   |   | X  | Nelson Destination Action Plan identifies the opportunity to develop activity based programs to support existing visitor markets including night markets, fishing events/ learn to fish programs and greater activation of walking trails and the river.   |


In 2019, implementation of the Great Ocean Road Action Plan included development of the “Great Ocean Road Supporting Infrastructure Assessment” – Arup GOR Touring Route Supporting Infrastructure Strategic Assessment – a copy of the report can be found here:

[GREAT OCEAN ROAD ACTION PLAN](#) >

[ARUP REPORT](#) >



# VISITOR AMENITIES INFRASTRUCTURE PRIORITIES

 Hover over coloured markers (+) for infrastructure priorities by region:

S10  
REFOCUSING THE  
VISITOR JOURNEY



# DRIVING GREATER TRAVEL

## THE HUB AND SPOKE APPROACH

---

There has been a significant focus on the linear nature of a road trip to the region and key destinations and attractions and whilst, this fuels day trip visitation, driving increased overnight stay requires increased emphasis on the proximity of experiences and destinations across the whole of the region and creation of a hub and spoke approach to exploring the region.

Destination focused hub and spoke is designed to create multi-night stays in the hub location. Product and experience based hub and spokes are designed to stimulate either multi-night stays in one location or multi-location stays but sell the breadth of the experience within the region.

The hub and spoke approach requires increased cross promotion of destinations and/or experiences and supports targeting visitors that want to create a base and explore. Hub and spoke works for destination, products and experiences and supports curating the optimum visitor experience for key target markets.

The region's big nature experiences especially walks, waterfalls, trails and adventure based activity can drive hub and spoke visitation, as will the growth of food and artisan type experiences.



Hover for examples of hub and spoke travel:

|             |   |
|-------------|---|
| DESTINATION | + |
| PRODUCT     | + |
| EXPERIENCE  | + |



**THE HUB AND SPOKE  
APPROACH WORKS  
FOR DESTINATION,  
PRODUCTS AND  
EXPERIENCES**

| S11  
BRAND



# BRAND

## GREAT OCEAN ROAD

---

### Regional brand

The Great Ocean Road region brand essence 'Where untamed spirits create inspirational wonder' facilitates a shift from focusing on the road and the rocks to focusing on big nature as the region's greatest strength.

Big Nature delivered through the magic and majesty of the Southern Ocean and the coast line it has sculptured, the big waves of Bells Beach, the tall trees and waterfalls of the Great Otway National park, the lakes and craters of the Volcanic Plains, big tuna, whales, wildlife and rich agriculture.

### Brand framework

A strong brand framework has been established to facilitate cohesion and consistency in all elements of marketing, product development, distribution and visitor servicing. The framework sets the foundations for the celebration of the region's four experience pillars under our key strength of Big Nature:

- **Active Adventure:** shifts the narrative from a passive visit to the region to a more immerse active visit. To explore the beauty of our landscape you need to immerse yourself and be active.
- **Village Inspiration:** celebrating the unique features and attributes that define the character of the towns and villages that make up our region.
- **Curated Culture:** celebrates the entrepreneurs and artisans of all crafts that call the GOR home. Inspired by the landscapes and its bounty they help define a sense of provenance and shape the character of our individual towns and villages.
- **Surf and Saltwater Wellness:** enables us to celebrate the coast, its power to draw people and its capacity to support holistic wellness.

The framework also facilitated the development of individual destination brands. This enables individual destinations to showcase their individuality whilst adding to the sum of the whole.

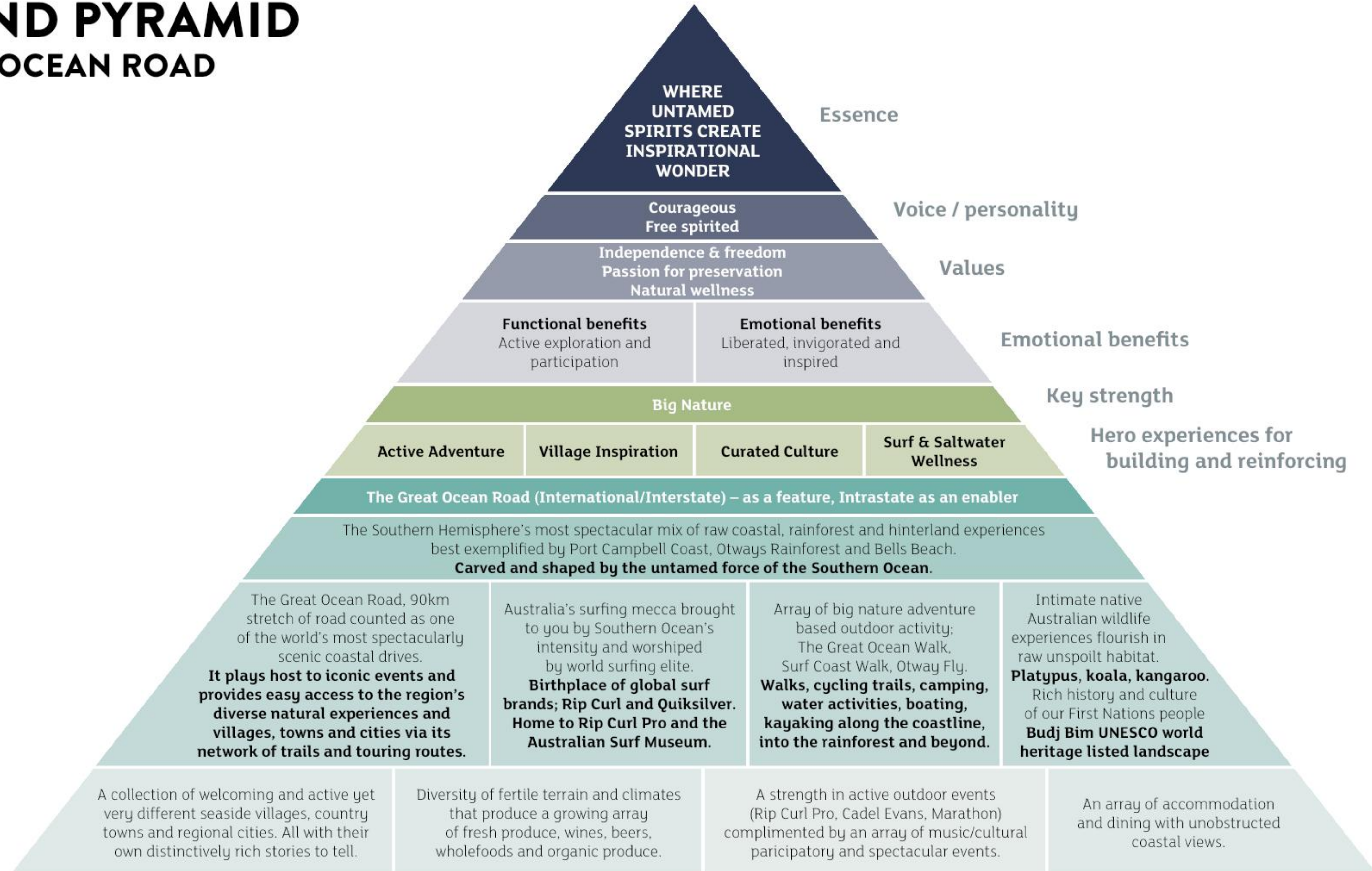
Brand toolkits and brand assets are provided to business operators to amplify brand messaging.



**WHERE UNTAMED  
SPIRITS CREATE  
INSPIRATIONAL  
WONDER...**

# BRAND PYRAMID

## GREAT OCEAN ROAD



# SUPPORTING THE BRAND

## DESTINATION BRANDS



Click destination brands for information:



A person with their hair in a bun, wearing a black puffer jacket, is seen from behind, holding a camera up to take a picture of a swampy forest. The scene is a dense forest with many tall, thin trees and a body of water in the foreground. The lighting is soft, suggesting an overcast day.

| S12  
**CUSTOMER PROFILES**

# OUR CUSTOMER PROFILES

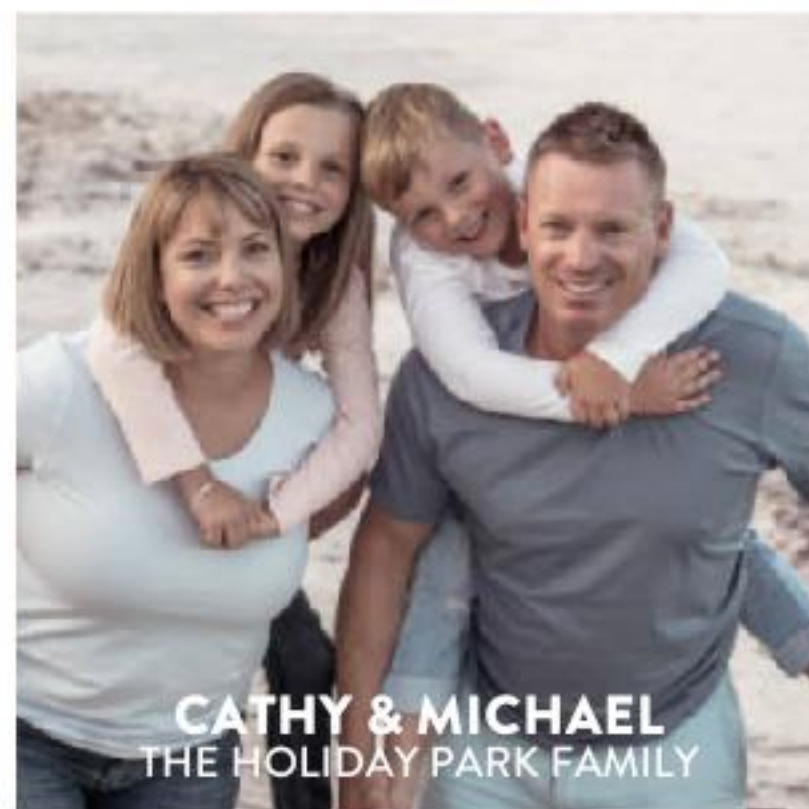
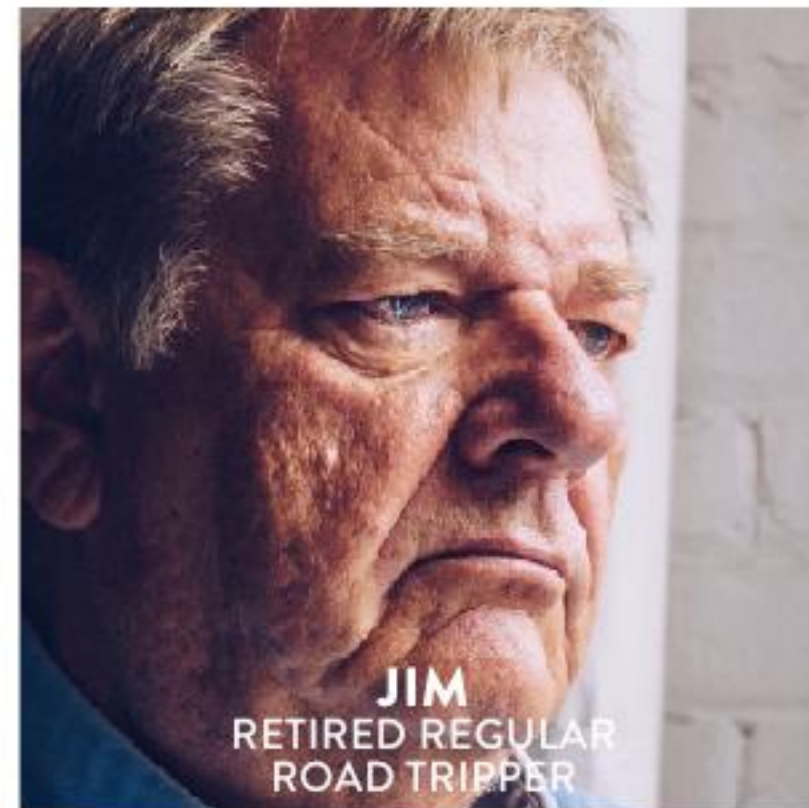
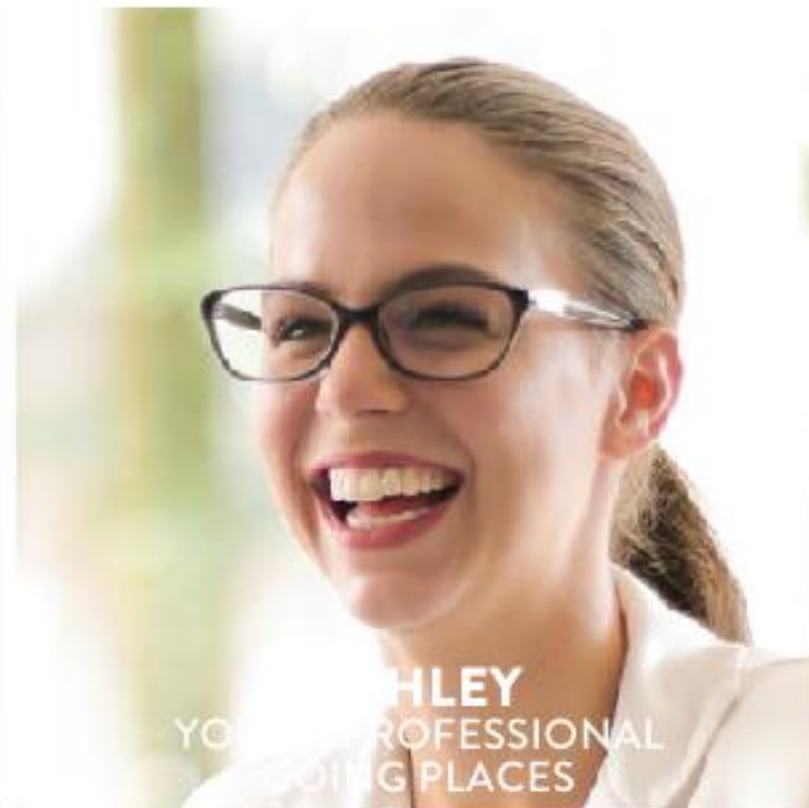
## AN INTRODUCTION

Understanding who our customers are and who we want them to be enables us to develop targeted marketing & promotional activity at a regional level, destination level and Product/business level.



Click images to view profiles:

CUSTOMER PROFILE APPLICATION TRAINING PROGRAM >



**WATCH >** Understanding our customer profiles

# MEET JESS

## THE DISCERNING PROFESSIONAL SUPER MUM



 **WATCH** > Meet Jess Video.

### BACKGROUND

Jess is a sociable, popular mother of two thriving young kids.

She is focused on career and family, juggling both on a daily basis.

She likes to know what's going on in their social circle and enjoys regular catch-ups with the girls.

She is close to her parents and her siblings and they catch up for family occasions, usually at their house.

She loves to travel and explore, travelling internationally once a year and swapping city for rural or coast whenever they can manage.

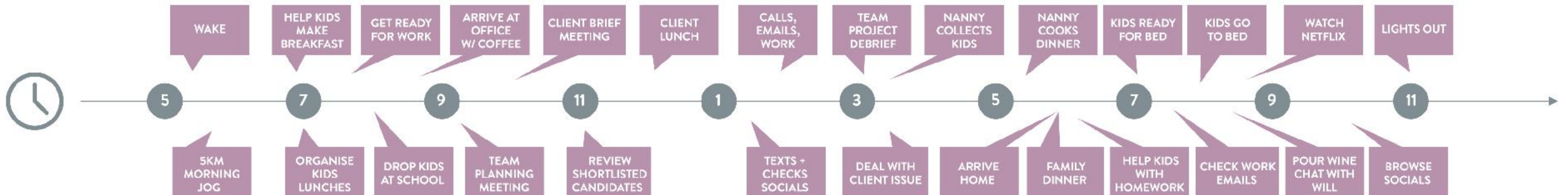
[BACK TO SUMMARY OF PROFILES](#) >



### I'D LOVE TO GET AWAY...

|                               |   |
|-------------------------------|---|
| THE FACTS                     | + |
| GOALS                         | + |
| FRUSTRATIONS                  | + |
| BEHAVIOURS                    | + |
| INTERESTS                     | + |
| COMMON OBJECTIONS             | + |
| INFO SOURCES & WATERING HOLES | + |
| KEY THEMES                    | + |


### TYPICAL DAY IN THE LIFE



# MEET CAMERON

## THE ACTIVE FAMILY DAD



 **WATCH** > Meet Cameron Video.

### BACKGROUND

Cam is a family man through and through, and loves nothing more than spending time with the kids.

He is warm-natured, open-minded and socially connected.

He lost his beloved father at the early age of 60 to a heart attack and he's never quite gotten over it.

Health, balance and family time are important to him as he focuses on giving the family the best life he can now and in the future.

He's very proud and loves what he does in all aspects of life.

[BACK TO SUMMARY OF PROFILES](#) >



## WE'LL GO FOR A HIKE THIS WEEKEND, HEY?

**THE FACTS** +

**GOALS** +

**FRUSTRATIONS** +

**BEHAVIOURS** +

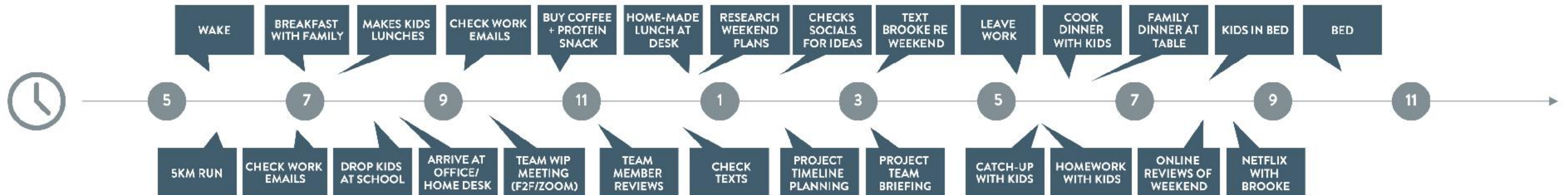
**INTERESTS** +

**COMMON OBJECTIONS** +

**INFO SOURCES & WATERING HOLES** +

**KEY THEMES** +

### TYPICAL DAY IN THE LIFE



# MEET MIRIAM

## THE WEALTHY EMPTY NESTER



 **WATCH** > Meet Miriam Video.

### BACKGROUND

Miriam is a high-earning professional that loves the finer things in life.

She's discerning, well-travelled and knows what she wants in life.

Her children have left home to live in central Melbourne and her and Phil are enjoying the quiet.

Her role is demanding so she makes sure she takes a well-earned break at least once a month.

[BACK TO SUMMARY OF PROFILES](#) >



## I'VE BOOKED MYSELF A RETREAT

**THE FACTS** +

**GOALS** +

**FRUSTRATIONS** +

**BEHAVIOURS** +

**INTERESTS** +

**COMMON OBJECTIONS** +

**INFO SOURCES & WATERING HOLES** +

**KEY THEMES** +


### TYPICAL DAY IN THE LIFE



# MEET MATTHEW

## THE PROFESSIONAL WITH A LOVE OF THE OUTDOORS



 **WATCH** > Meet Matthew Video.

### BACKGROUND

Matt fancies himself as a bit of a trailblazer, intent on leading the pack rather than following.

He has success on his mind, whether it be work or play – he's set on making the most of life.

His love of adventure sees him travelling all over to find the next 'must-go' spot, be it for surfing, hiking, mountain biking – anything!

His corporate ladder climb has left him tired and a bit jaded, so balancing work and play is very important to him as he gets older.

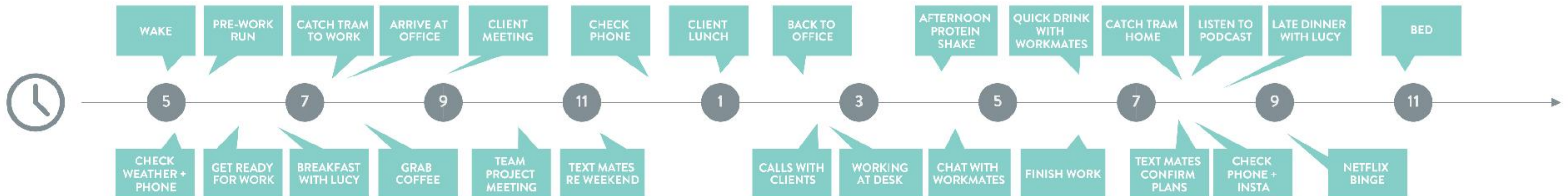
[BACK TO SUMMARY OF PROFILES](#) >



### THERE'S A NEW SPOT I'VE HEARD ABOUT

|                               |   |
|-------------------------------|---|
| THE FACTS                     | + |
| GOALS                         | + |
| FRUSTRATIONS                  | + |
| BEHAVIOURS                    | + |
| INTERESTS                     | + |
| COMMON OBJECTIONS             | + |
| INFO SOURCES & WATERING HOLES | + |
| KEY THEMES                    | + |


### TYPICAL DAY IN THE LIFE



# MEET ASHLEY

## THE YOUNG PROFESSIONAL GOING PLACES



 **WATCH** > Meet Ashley Video.

### BACKGROUND

Ashley is a career driven young woman who is determined to live her best life possible.

She works hard and wants to play hard too, if wine and cheese, coffee and coastal walks are considered playing hard!

She is very family focused and when she's not on a day trip or weekend away, she'll likely be visiting her parents or siblings.

She'd like to settle down but not at the expense of living life now – there has to be a balance.

[BACK TO SUMMARY OF PROFILES](#) >



## LET'S GET OUT OF THE CITY

- [THE FACTS](#) +
- [GOALS](#) +
- [FRUSTRATIONS](#) +
- [BEHAVIOURS](#) +
- [INTERESTS](#) +
- [COMMON OBJECTIONS](#) +
- [INFO SOURCES & WATERING HOLES](#) +
- [KEY THEMES](#) +

### TYPICAL DAY IN THE LIFE



# MEET JIM

## THE RETIRED REGULAR ROAD-TRIPPER



 **WATCH** > Meet Jim Video.

### BACKGROUND

Jim is retired and ready to make the most of his new and freedom with his beloved wife, Alice.

He finished year 10, then went to learn a trade, completing an apprenticeship as a joiner then following his love of woodworking his whole career.

He loves to get out and about and is determined to make the most of retirement, balancing visits to the family with visiting new places.

He loves history, woodworking, quiz shows and gardening. He also loves meeting people on his travels.

[BACK TO SUMMARY OF PROFILES](#) >



## WE'LL VISIT THE KIDS NEXT MONTH

**THE FACTS** +

**GOALS** +

**FRUSTRATIONS** +

**BEHAVIOURS** +

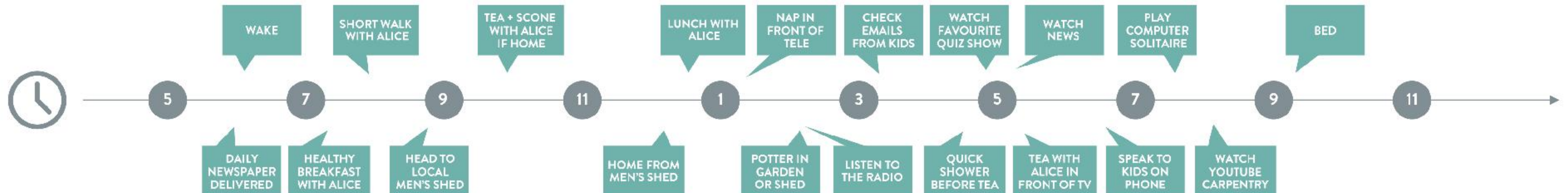
**INTERESTS** +

**COMMON OBJECTIONS** +

**INFO SOURCES & WATERING HOLES** +

**KEY THEMES** +

### TYPICAL DAY IN THE LIFE



# MEET CYNTHIA

## THE NOT-SO-LOCAL LOCAL



 **WATCH** > Meet Cynthia Video.

### BACKGROUND

Cynthia is a professional and a mother, whose children have just flown the nest in the last year.

She's heading toward a sea change in the next 10 years or so, though some may say she's already on her way!

They own a holiday house in Lorne where they'll eventually move when they retire.

With the kids moving out for uni, they recently sold their house in Brighton and down-sized to an apartment, preferring to spend their time on the coast rather than in the city.

[BACK TO SUMMARY OF PROFILES](#) >



## HAVE YOU SEEN THAT NEW RESTAURANT?

|                               |   |
|-------------------------------|---|
| THE FACTS                     | + |
| GOALS                         | + |
| FRUSTRATIONS                  | + |
| BEHAVIOURS                    | + |
| INTERESTS                     | + |
| COMMON OBJECTIONS             | + |
| INFO SOURCES & WATERING HOLES | + |
| KEY THEMES                    | + |

### TYPICAL DAY IN THE LIFE



# MEET TIM

## THE BUCKET-LISTING MILLENNIAL



WATCH > Meet Tim Video.

### BACKGROUND

Tim is your quintessential Millennial with a social conscience and a drive to live life to the full.

He's close to his family but doesn't see his parents much.

He has dreams for the future but since Covid, he's questioning all his parents taught him about hard work, putting long hours in and competing in the workplace.

He's a hard worker but doesn't believe it's the be all and end all. He believes you get out of life what you put in.

Tim is sociable and well-liked.

[BACK TO SUMMARY OF PROFILES](#) >



### CHECK OUT MY INSTA!

THE FACTS



GOALS



FRUSTRATIONS



BEHAVIOURS



INTERESTS



COMMON OBJECTIONS



INFO SOURCES & WATERING HOLES



KEY THEMES



### TYPICAL DAY IN THE LIFE



5

7

9

11

1

3

5

7

9

11

WAKE AFTER SNOOZING ALARM

SEARCH BEST SURFING SPOTS

YOUTUBE PLACES FOUND

SCROLL NEWS ONLINE

HEAD TO WORK

START WORK LATE SHIFT

CHAT TO REGULAR CUSTOMERS

CHECK SOCIALS

GRAB DINNER AT WORK

TEXT GIRLFRIEND

HEAD HOME

SEARCH PLACES TO GO

BED

SCROLL SOCIALS

TEXT MATES PLANS FOR WEEKEND

CHECK WORK SCHEDULE ON PHONE

SEARCH/VIDEOS/REVIEWS

CHECK SOCIALS

TEXT MATES WHAT HE FOUND

TAKE PHOTOS FOR BAR MANAGER

BREAK

TEXT MATES

SCROLL SOCIALS

FINISH WORK

CHAT TO WORKMATES

TEXT MATES

# MEET VJ

## THE HEART OF THE MULTI-GENERATIONAL FAMILY



 **WATCH** > Meet VJ Video.

### BACKGROUND

VJ sits at the heart of his family, the decision maker and organiser. He is a pillar of the community and loved by all who know him.

Not overly social outside of his close-knit community, he's a friendly, warm, generous man.

His family is his everything and he is driven by the need to give his children a good life full of experiences and discovery. He likes his job and the people he works with and is content.

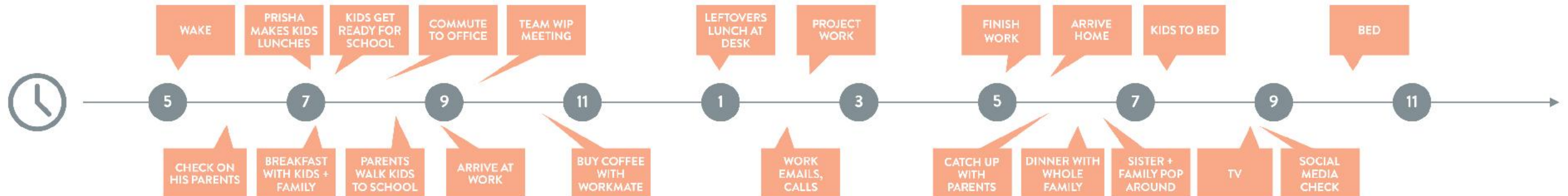
[BACK TO SUMMARY OF PROFILES](#) >



**I WANT TO SHOW THE KIDS...**

|                               |   |
|-------------------------------|---|
| THE FACTS                     | + |
| GOALS                         | + |
| FRUSTRATIONS                  | + |
| BEHAVIOURS                    | + |
| INTERESTS                     | + |
| COMMON OBJECTIONS             | + |
| INFO SOURCES & WATERING HOLES | + |
| KEY THEMES                    | + |

### TYPICAL DAY IN THE LIFE



# MEET JUNE

## THE FAMILY-CENTRED STUDENT



 **WATCH** > Meet June Video.

### BACKGROUND

June is a motivated international student, full of hope and promise for her life ahead.

She loves living in Australia and hopes to make it a permanent home after she finishes studying.

She's a bit of a culture and nature buff and loves discovering anything new – food, drinks, farms, nature spots, activities.

She's also very sentimental and once a place captures her heart, she'll go back again and again.

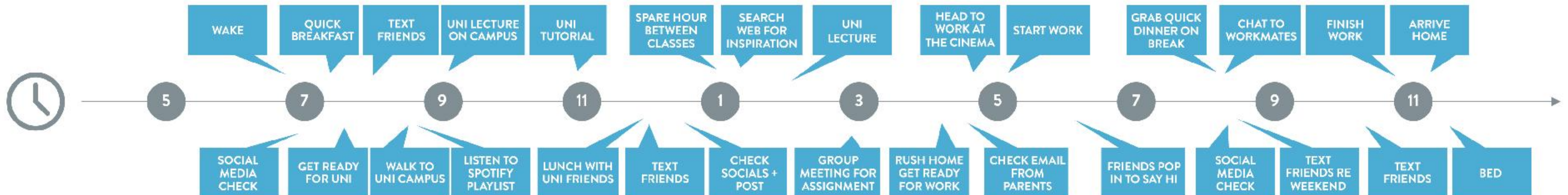
[BACK TO SUMMARY OF PROFILES](#) >



**I HAVE TO SHOW YOU THIS PLACE!**

|                               |   |
|-------------------------------|---|
| THE FACTS                     | + |
| GOALS                         | + |
| FRUSTRATIONS                  | + |
| BEHAVIOURS                    | + |
| INTERESTS                     | + |
| COMMON OBJECTIONS             | + |
| INFO SOURCES & WATERING HOLES | + |
| KEY THEMES                    | + |

### TYPICAL DAY IN THE LIFE



# MEET CATHY & MICHAEL

## THE HOLIDAY PARK FAMILY



 **WATCH** > Meet Cathy & Michael Video.

### BACKGROUND

Cathy and Michael are a sociable, popular couple with a young vibrant family and a busy life.

They love nothing more than escaping to their favourite town on the Great Ocean Road, spending time with friends and extended family. It's like their home away from home and an escape from the everyday.

They want the kids to enjoy a freedom on holidays that they can't get at home, so community and familiarity are highly valued.

They enjoy trying new experiences and eateries but are also loyal to their local favourites.

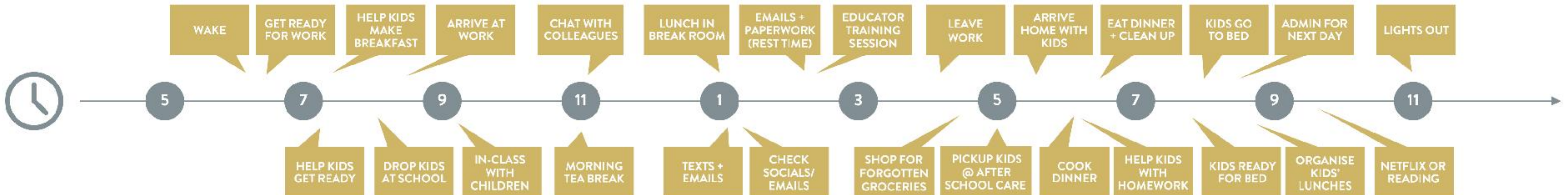
[BACK TO SUMMARY OF PROFILES](#) >



**EVERYONE WILL BE THERE...**

- [THE FACTS](#) +
- [GOALS](#) +
- [FRUSTRATIONS](#) +
- [BEHAVIOURS](#) +
- [INTERESTS](#) +
- [COMMON OBJECTIONS](#) +
- [INFO SOURCES & WATERING HOLES](#) +
- [KEY THEMES](#) +

### TYPICAL DAY IN THE LIFE



# S13 THE PLAN OF ACTION



The Great Ocean Walk is an unforgettable eight day, one direction, long-distance walk.

- [www.greatoceanwalk.com.au](http://www.greatoceanwalk.com.au)
1. Plan and research - use this map and [www.greatoceanwalk.com.au](http://www.greatoceanwalk.com.au)
  2. Book online - use the website for camping and accommodation nearby
  3. Pack the Map - load your gear and advise someone of your itinerary
  4. Download the App - to enjoy the Great Ocean Walk's stories

Preparation will ensure you have a safe, enjoyable and inspiring experience.

**Ngatanzarr (Welcome)**  
As Traditional Owners of the surrounding Nation we welcome you to the Great Otway National Park, located within our Traditional Country.

We possess a long, rich and strong living cultural heritage that we share with all people who visit. Caring For Country is an essential part of our culture and law.

May your visit be filled with great experiences, so that part of our Country will remain with you in good memories.

*Ngatanzarr, Ngatanzarr (All is good, All is Healthy)*

**Nature's drama unfolds at every step as you walk parallel to the Great Ocean Road passing through Victoria's iconic Great Otway and Port Campbell national parks.**

Where your way through tall forests, coastal headlands, beaches and rocky shores and along windswept cliff tops presenting amazing views.

Choose from eight incredible days or take the whole walk, taking up to eight days covering approximately 100km. This is a one-direction walk - always towards the Twelve Apostles. This assists visitor flow by minimising track congestion and maximising campsite availability.

**Location and access**  
The Great Ocean Walk stretches from Apollo Bay to the Twelve Apostles, 115 kilometres from Port Campbell.

**From Melbourne**  
Travel to Apollo Bay (200km south west of Melbourne) via the M1 to Geelong. Access it along the B100 (Great Ocean Road) or via the A1 to Colac and over the range to the coast.

**From the west**  
Approach along the B100 (Great Ocean Road) via Port Campbell.

Day car parking is available at parking areas shown on the map. The vehicle owner is responsible for vehicles left in parking areas.

**For bus and V/Line Country Train information** call 13 6196

A daily bus service between Geelong, Lorne and Apollo Bay connects with Melbourne train services. A bus service connects Port Campbell and Apollo Bay Monday, Wednesday and Friday.

**Car shuttle service**

**Great Ocean Road Shuttle**  
(03) 5237 9278 or 0428 379 278


**Timboon Taxi** - 0438 407 777

**Christian Bus Co. (V/Line)** - (03) 5562 9432

**Walk 91** - (03) 5237 1189 or 0405 495 909

# SIX KEY PILLARS

## DESTINATION MANAGEMENT STRATEGY

 Click (+) to read more:

| INVESTMENT & DEVELOPMENT | VISITOR MANAGEMENT   | DESTINATION PLANNING | ADVOCACY             | MARKETING            | INDUSTRY DEVELOPMENT |
|--------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| STRATEGIC INSIGHTS +     | STRATEGIC INSIGHTS + | STRATEGIC INSIGHTS + | STRATEGIC INSIGHTS + | STRATEGIC INSIGHTS + | STRATEGIC INSIGHTS + |
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SUGGESTED SECTIONS TO READ NEXT +

# INVESTMENT & DEVELOPMENT DESTINATION MANAGEMENT STRATEGY

## PLAN ON A PAGE

### WHERE ARE WE NOW?

Awaiting the \$1.5b in public and private sector investment that will facilitate year round visitation and drive quality visitor experiences to enhance interstate and international competitiveness

### WHERE DO WE WANT TO BE?

A region offering a breadth of products, experiences and attractions that support a portfolio of visitor markets to enjoy year-round, multi-night trips and repeat visitation

### PRIORITIES TO GET THERE

- Investment attraction and facilitation
- Improved road access
- Product development facilitation
- A strong and effective GORC & PA

## STRATEGIC INSIGHTS

- Enhances the quality of the visitor experience and increases length of stay
- Appeals to new audiences and drives length of stay, or dispersal
- Supports year-round visitation
- Generates visitation in its own right
- Fills existing product gaps and builds the region's competitiveness
- Reinforces the region's brand and complements existing product strengths
- Supports development of non weather dependent, year round and night time products
- Price competitiveness – yield generation requires an increased emphasis on developing “value” for the visitor. The price of accommodation, attractions and services needs to be competitive and reflect the quality of the product offering

## STRATEGY & ACTIONS

### STRATEGY

To support the development of appropriate infrastructure, products, services and experiences to support a quality visitor experience and meet the consumer demands and expectations of key target markets

### ACTIONS

1. Investment in and support of Avalon as Melbourne's second international airport and a gateway to the region
2. Increased transport access to the region including from Geelong as a Gateway and future home to the TT Line and Geelong Convention Centre
3. Improved road access with the upgrading of the M1 and internal roads to support visitor dispersal
4. Reduce dependence on visitor own transport with greater connection between towns and from towns to key attractions
5. Implementation of the GOR signage strategy
6. Enhanced digital infrastructure and increased connectivity
7. Investment attraction and facilitation – undertake an economic opportunities analysis to support product development and investment attraction
8. Grow the breadth of iconic products and facilitate development of supplementary and support products, experiences and services to diversify the product offering and appeal to new higher yielding markets
9. Maintain and develop public land and waterways managed by GORC&PA via visitor contribution funding strategy
10. Enhance character and quality of townscapes
11. Accelerate implementation of the GOR Aboriginal Product Development Strategy
12. Maximise the tourism and economic potential of events
13. Invest in the development of the agri-tourism sector to support integration of the region's agricultural strength within the visitor experience
14. Invest in the development of the creative industries sector across the region to support growing new visitor markets, year round visitation and night time product
15. Invest in the development of Infrastructure to support growing the recreational fishing sector
16. Support development of hinterland product to facilitate visitor dispersal

# VISITOR MANAGEMENT DESTINATION MANAGEMENT STRATEGY

## PLAN ON A PAGE

### WHERE ARE WE NOW?

The region has experienced the negative impacts of a heavy reliance on day trip visitors seeking an iconic experience coupled with underinvestment in the infrastructure to cater for them and/or strategies to manage visitor numbers and the visitor experience

### WHERE DO WE WANT TO BE?

A sustainable, vibrant region that understands and balances socio-economic, cultural and environmental pressures to deliver year-round visitation across the region that supports the local community

### PRIORITIES TO GET THERE

- Investment in a balanced and sustainable strategy
- Managed numbers and support infrastructure at key locations
- Stay longer – hub and spoke
- Development of multiple hero attractions
- Contemporary visitor servicing
- Touring route development
- Spread the peaks
- Introduction of a visitor contribution funding model

## STRATEGIC INSIGHTS

- Balances economic and environmental impacts
- Implementation of demand management strategies is part of the mix
- Quality over quantity can drive greater long-term profitability
- Generating year round, overnight visitation is critical to creating a resilient visitor economy

## STRATEGY & ACTIONS

### STRATEGY

To manage visitor growth and impacts on communities and the environment

### ACTIONS

1. Build a sustainable visitor contribution funding model to ensure investment in the management, development and marketing of the region
2. Develop and market multiple 'hero' attractions to capture and manage mass visitation to increase length of stay and dispersal
3. Secure eco destination accreditation through Eco Tourism Australia
4. Identify key natural attractions, lookouts, and visitor nodes and undertake capacity studies, develop site specific visitor management plans, infrastructure investment and maintenance plans and demand management tool ie quotas, bookings, fees, signage etc
5. Accelerate implementation of the Future of Visitor Servicing Strategy to deliver a regional, integrated approach to visitor servicing
6. Acknowledge and develop mechanisms that address the two speed economy ie. charge more for less, recognise and reward length of stay
7. Seek to manage and contain high volume, low yield international coach based day trip visitation.

# DESTINATION PLANNING

## DESTINATION MANAGEMENT STRATEGY

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### PLAN ON A PAGE

#### WHERE ARE WE NOW?

Destination Action Plans are regularly developed and reviewed but lack the funding and resources to drive successful and timely implementation

#### WHERE DO WE WANT TO BE?

- Plans underpinning destination investment and activities
- Plans actively endorsed and supported by all stakeholders, operators, community, trader organisation, council and Regional Tourism Board

#### PRIORITIES TO GET THERE

- Strong, consistent and effective leadership
- Strong partnerships and collaboration
- Ongoing adequate investment
- Prioritisation of resourcing

### STRATEGIC INSIGHTS

- Building strong destinations is critical to capturing length of stay, repeat visitation and dispersal
- Destination driven priorities are critical to ensuring relevant and responsive strategies
- Destination Planning provides the greatest capacity to respond to crisis and/or funding opportunities when they become available
- Destination Planning recognises the unique challenges of each destination whilst also providing insight into those that are across destinations or the region

### STRATEGY & ACTIONS

#### STRATEGY

Encourage, support and facilitate the development and implementation of destination driven action plans

#### ACTIONS

1. Support the implementation and refreshing of existing Destination Action Plans
2. Encourage emerging destinations to develop Destination Action Plans
3. Seek funding to support regional implementation of common Destination Action Plan priorities
4. Support the attraction of resourcing and development of local tourism and trader organisations to facilitate implementation of Destination Action Plan priorities

# ADVOCACY

## DESTINATION MANAGEMENT STRATEGY

---

### PLAN ON A PAGE

#### WHERE ARE WE NOW?

- Success has been achieved in attracting Government funding for priority infrastructure and governance reform
- Good collaboration on priorities
- Leadership by GORRT

#### WHERE DO WE WANT TO BE?

- Implementation of actions of this plan
- Continued investment in infrastructure to meet demand
- Visitor management improved
- Community supports the visitor economy

#### PRIORITIES TO GET THERE

- Leadership
- Strategic Plan
- Collaborative approach with agreed priorities

### STRATEGIC INSIGHTS

- Community understanding and recognition of the value of the region's visitor economy will underpin sustainable destination development
- Leadership to develop and deliver a professional advocacy strategy increases success
- Collaborative and consistent communication of advocacy priorities by stakeholders maximises outcomes
- Successful advocacy is a long game requiring consistency, patience and persistence. Division is death

### STRATEGY & ACTIONS

#### STRATEGY

Lead a regional approach to partnering with all levels of government and stakeholders to deliver a sustainable and vibrant visitor economy

#### ACTIONS

1. Create a strong single voice for the visitor economy that delivers a long-term strategic focus, alignment of strategies and resources, a reduction in duplication and a coordinated and collaborative framework
2. Implement the Great Ocean Road Action Plan and support the effective resourcing of the Great Ocean Road Coast and Parks Authority.
3. Develop and implement a community awareness of the value of a sustainable visitor economy communication strategy

# MARKETING DESTINATION MANAGEMENT STRATEGY

## PLAN ON A PAGE

### WHERE ARE WE NOW?

Using an evidence based approach to leverage the brand equity in the Great Ocean Road and 12 Apostles to amplify the destinations and experiences of the region

### WHERE DO WE WANT TO BE?

Amplifying a global brand that represents a breadth of world-class, year-round hero products and experiences that drive length of stay and dispersal

### PRIORITIES TO GET THERE

- Maintaining a strong regional approach
- Build destinations and experiences
- Amplification of the region's digital footprint
- Leveraging state and federal programs
- Building strong and effective partnerships

## STRATEGIC INSIGHTS

- Actively target visitors that are seeking slow, purposeful and immersive experiences
- Build on the brand pillars and grow knowledge of the destinations and experiences
- Maintain an evidence base to drive an agile and responsive marketing approach
- Partner with community to build the social licence to support visitation
- Maximise existing and return visitors to grow satisfaction and increased length of stay and expenditure – one more coffee, one more meal, one more attraction, one more night
- Encourage touring to increase dispersal and to link experiences and destinations
- Facilitate an integrated content driven approach – repurpose content to maximise distribution, engagement and reach
- Build visitors' connectedness and relationship with the region by focussing on the stories that shape it
- 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

## STRATEGY & ACTIONS

### STRATEGY

To market the region, its destinations, products and experiences to key target markets that support growing length of stay, expenditure and dispersal and ensure a balanced portfolio of markets

### ACTIONS

1. Continue to build increased brand equity, leveraging Tourism Australia and Visit Victoria marketing campaigns and buy in to drive content use and amplification of region and destination brands
2. Deliver an integrated and effective "always on" digital footprint
3. Continue to evolve the Melbourne market with a focus on increasing length of stay, yield and dispersal
4. Drive demand through consumer, trade and media marketing and promotion
5. Fish where the fish are – build partnerships and collaborations that leverage key audiences
6. Use events to drive brand and year round visitation
7. De-market express tourism – promote slow, immersive experiences
8. De-emphasise the drive experience
9. Leverage the visitor experience to enhance lifestyle investment opportunity and population attraction
10. Leverage key trends ie. wellness

# INDUSTRY DEVELOPMENT DESTINATION MANAGEMENT STRATEGY

## PLAN ON A PAGE

### WHERE ARE WE NOW?

Industry heavily reliant on peak season visitation to key attractions. Seasonality, workforce limitations etc. limiting business growth and development

### WHERE DO WE WANT TO BE?

A resilient, connected, collaborative and professional industry delivering quality products, experiences and services that exceed visitor expectations

### PRIORITIES TO GET THERE

- Industry training and development to support resilience, profitability and sustainability
- Support for workforce development and attraction
- Enhanced digital footprint

## STRATEGIC INSIGHTS

- Builds a resilient and competitive sector
- Builds digital capability
- Encourages continued improvement of products, experiences and services
- Enhances visitor satisfaction and referral
- Encourages collaboration and cooperative product development and promotion

## STRATEGY & ACTIONS

### STRATEGY

To support and develop the capacity of industry to maximise returns from sustainable growth

### ACTIONS

1. Implementation of the GOR Workforce Development Strategy to support incentivising, attracting and maintaining a skilled workforce
2. Development of a needs based industry training and development program to support business resilience, success and sustainability and create industry connectedness and cohesion
3. Support the development and promotion of co-operative retail product showcasing the breadth of product and underpinning dispersal objectives
4. Increase the digital capacity, capability and participation including direct booking capability, customer development and marketing and promotion
5. Support ongoing development of tools to ensure an evidence based approach to product development, marketing and promotion
6. Support operators to invest in accessible facilities and services to prepare for the changing needs of an ageing population and an increasing percentage of the market with some form of disability

| S14  
DESTINATION - FOCUS





# DESTINATION PLANNING

## THE DESTINATIONS

 Click on coloured markers (+) for destination focus:

# DESTINATION ACTION PLANS

## AN OVERVIEW

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The process of developing destination action plans has been developed by Wayne Kayler-Thomson Pty Ltd based on experience and research of strategic planning for regional tourism development, marketing and management.

The process is centred on the fact that visitors are attracted to specific destinations and experiences within regions and that the industry and communities of local destinations have shared interest in developing their visitor economy.

The plans have been facilitated by GORRT in partnership with Local Government, Local Tourism organisations and business and community leaders.

Destination Action plans identify the 5-10 priority strategies and actions (industry development, product development, marketing & promotion, visitor management and advocacy) which will make a significant difference to improving the visitor experience and contribution of tourism to a destination.



# DESTINATION FOCUS

## 12 APOSTLES COAST & HINTERLAND

### VISION:

By 2030, the 12 Apostles Coast and Hinterland will be a World Class destination where visitors leave rejuvenated and satisfied with the experiences they have enjoyed with a deeper connection to the cultural and spiritual stories in the landscape.

It will be evident that the many natural attractions here are treated with respect and an environmentally sustainable approach has been factored into development. The demonstration of this helps create awareness and respect by visitors on how to behave in and care for the environment.

Visitors come here to experience the iconic landscape and discover that there is much more to see and do creating a need to stay longer. There are many and varied wellness, food and shopping experiences available

all year round and a wide selection of accommodation options.

Visitors love the authentic connection to local communities and the land and enjoy the high-quality cuisine sourced from local produce. Visitor servicing here is at the forefront of modern technology and have multiple travel modes available to access the region, high standards of roads and way finding expand the opportunities to connect with the culture and stories of the landscape.

Communities are vibrant and attract many passionate people to live, work and do business here. Young people in the visitor economy industry want to work, learn and live hereto gain experience in this world class sustainable tourism destination, which is valued by the community.



**WATCH >** 12 Apostles Coast & Hinterland Brand Video.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



# DESTINATION FOCUS

## ANGLESEA

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### VISION:

Anglesea provides a genuine authentic experience for visitors and welcomes them to a well-balanced collaborative and supportive community.

Here, passionate leaders harness opportunities, adapt to change and embrace sustainability.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Anglesea Brand Video.

# DESTINATION FOCUS

## AIREYS INLET

---

### VISION:

For Aireys Inlet to be a more vibrant and connected community that is a celebration of nature-based tourism.

Visitors are encouraged to respect, admire and connect with the rich and changing landscapes, the events, the artists and the artisans.

Staying is a pleasure, and visitors become connected and long to return.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



**WATCH** > Aireys Inlet Brand Video.

# DESTINATION FOCUS

## APOLLO BAY

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### VISION:

Apollo Bay is a vibrant visitor destination which is home to a community of strong and engaged businesses and strong representative organisations, focussed on providing quality service and experiences to encourage repeat visitation.

Visitors enjoy the relaxed ambience of the seaside fishing village where they can engage in immersive experiences and are located ideally to explore the surrounding Great Otway National Park and Great Ocean Road Region.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Apollo Bay Brand Video.

# DESTINATION FOCUS

## CASTERTON

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### VISION:

Casterton is a town where visitors are embraced and encouraged by the vibrant community to share in and celebrate the living culture, natural assets and rich heritage.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



**MICKLES LOOKOUT**



Click arrows to view Casterton

# DESTINATION FOCUS

## COLAC

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### VISION:

Colac is a destination positioned as a hub for visitors to the Otways and the Great Ocean Road region due to its geography, variety of experiences, excellent transport connections and a welcoming community.

There is a rich offering of experiences with produce sourced from the Otways and Volcanic Plains, cultural experiences drawn from the same landscape and a diverse range of accommodation, attractions, shopping and activities in a country city environment.

The lake is the heart of the community for locals and for visitors to enjoy recreational activities while staying in the destination or passing through on their Great Ocean Road journey.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



LAKE COLAC ROTUNDA



Click arrows to view Colac

# DESTINATION FOCUS

## LORNE

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### VISION:

Lorne is a picturesque destination loved by visitors and locals alike, with a strong community underpinning businesses that deliver a range of products and experiences, plus a calendar of sporting and cultural events that reflect

Lorne's brand and compliment the natural environment.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Lorne Brand Video.

# DESTINATION FOCUS

## NELSON

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### VISION:

Nelson is a well-known yet unspoilt place where outdoor adventure enthusiasts and those who appreciate nature come to enjoy the river, walks, beaches, and the enduring charm of the Nelson way of life and the people who live there.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



**GLENELG RIVER**



Click arrows to view Nelson

# DESTINATION FOCUS

## OTWAYS

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### VISION:

The Otways is a unique and stunning destination with a great diversity of villages and where one can immerse oneself in harmony with the world class natural beauty whilst having 'fun' engaging in a diverse range of quality experiences including visiting producers, events, mountain biking, bush walking or simply enjoying the wonderful beaches and rugged coastline.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Otways Brand Video.

# DESTINATION FOCUS

## OTWAY COAST HAMLETS

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### VISION:

The Otway Coast Hamlets celebrate the Otways meeting the coast. The perfect hub to explore and immerse yourself in the natural attractions and the riches they produce, synonymous with the Great Ocean Road region.

Known for its rich and diverse natural environment, the visitor and community amenity supports and showcases the breadth of ways to enjoy and explore including the opportunity to capture the majestic ocean vistas and to see a range of native wildlife.

The visitor experience is seamlessly managed and supports sustainability of flora and fauna. The experience of visitors and local community members is symbiotic and mutually respectful.

Visitors leave the area with an increased understanding of responsible approaches to engaging with a fragile environment and a positive experience of our coast and hinterland.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



SEPARATION CREEK



Click arrows to view Otway Coast Hamlets

# DESTINATION FOCUS

## PORT FAIRY

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### VISION:

Port Fairy is a leading destination in conscious travel with a deep and demonstrable appreciation of its rich history celebrated today in contemporary ways.

Year-round events embrace both visitors and locals in activities that celebrate the values of the community, it's stories, the natural environment and local artisans.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Port Fairy Brand Video.

# DESTINATION FOCUS

## PORTLAND

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### VISION:

Portland is a vibrant independent community with a strong multi-faceted economy located uniquely on Victoria's south west coast.

Portland is host to a rich and diverse range of visitor product and experiences, which celebrate the region's nature-based and active experience strengths including whale watching, fishing and the Budj Bim Cultural Landscape.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Portland Brand Video.

# DESTINATION FOCUS

## TORQUAY

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### VISION:

Torquay is renowned as the birthplace of Australian surfing culture and this is echoed in products and experiences delivered by a passionate and vibrant business community.

It is a premier year round conference and events destination.

OBJECTIVES



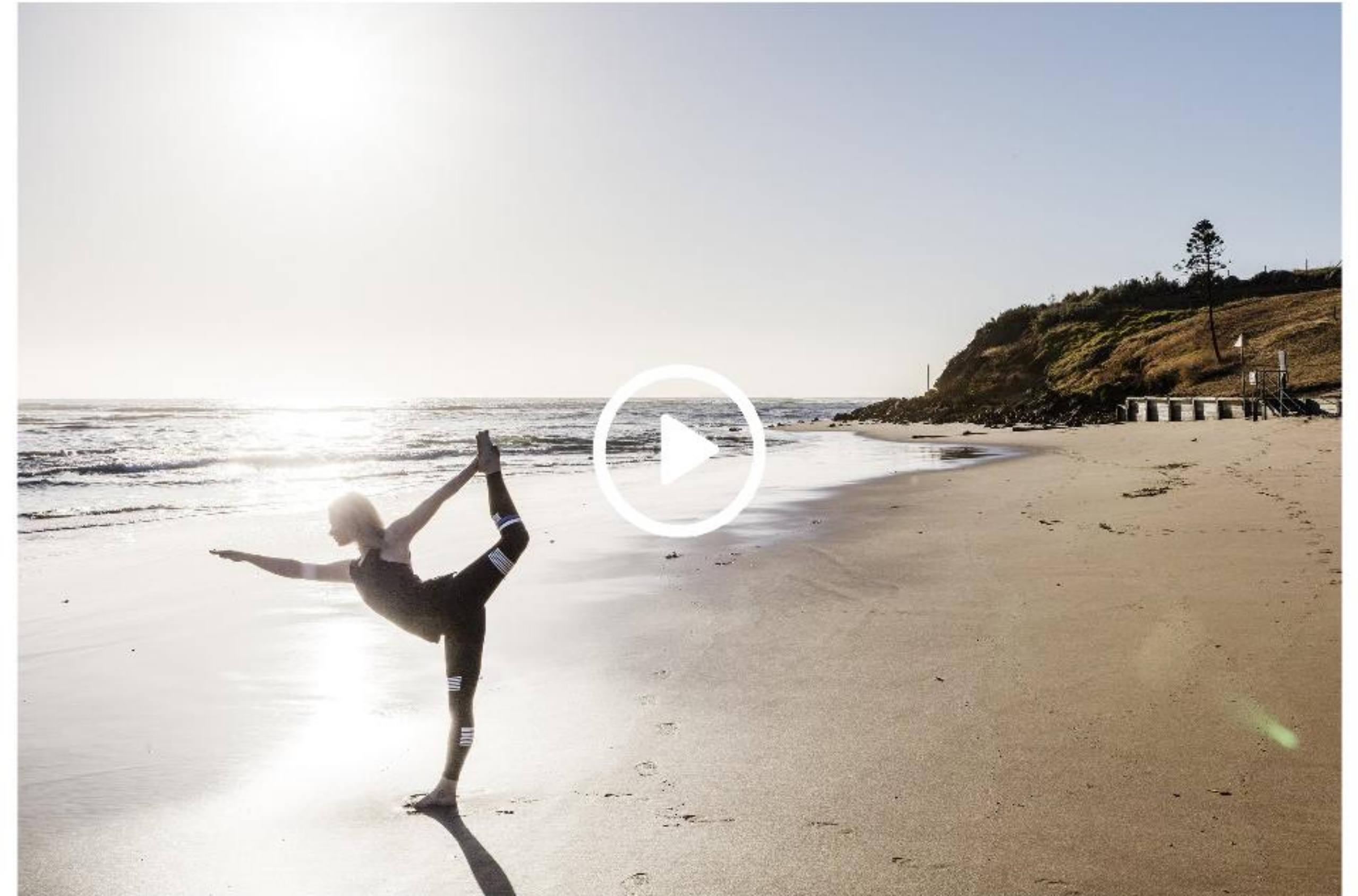
PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Torquay Brand Video.

# DESTINATION FOCUS

## VOLCANIC LAKES & PLAINS

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### VISION:

The Volcanic Lakes and Plains is recognised as a part of Victoria rich in cultural and natural beauty. With rich volcanic soil and rich agriculture, the history, village life and scenery combine to offer a diverse range of products and experiences for visitors from camping and fishing through to an eclectic and robust events calendar, all creating things to explore and reasons to spend more time in the region.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Volcanic Lakes & Plains Brand Video.

# DESTINATION FOCUS

## WARRNAMBOOL

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### VISION:

Warrnambool is a vibrant regional city, which is a centre for agriculture and renowned for leading in environmental and cultural cohesion.

Its natural beauty and large range of products and experiences make it the ideal hub for visitors to stay and explore the wider region.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



**WATCH** > Warrnambool Brand Video.

# DESTINATION FOCUS

## WINCHELSEA

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### VISION:

Celebrating our rich heritage (architectural, cultural and First Australians), very accessible, our river and majestic red gums, our rich agriculture, our community resilience.

OBJECTIVES



PRIORITIES



DESTINATION ACTION PLAN



WEBSITE



BARWON PARK



Click arrows to view Winchelsea

# THIS PLAN HAS BEEN FACILITATED BY GREAT OCEAN ROAD REGIONAL TOURISM

[WWW.GREATOCEANROADTOURISM.ORG.AU](http://WWW.GREATOCEANROADTOURISM.ORG.AU)  
EMAIL: [INFO@GORT.COM.AU](mailto:INFO@GORT.COM.AU)

## WE WOULD LIKE TO THANK ALL CONTRIBUTORS INCLUDING

Surf Coast Shire Council

Colac Otway Shire Council

Corangamite Shire Council

Warrnambool City Council

Moyne Shire Council

Glenelg Shire Council

Visit Victoria

Tourism Greater Geelong  
& The Bellarine

DWELP

Parks Victoria

Barwon South West RDA

## DESTINATION ACTION PLANS HAVE BEEN PREPARED WITH

Business & Tourism Angelsea

Lorne Business &  
Tourism Association

Apollo Bay Chamber of Commerce

Twelve Apostles Business  
& Tourism Association

Port Fairy Tourism Association

Growing Winchelsea

Colac Chamber of Commerce

THIS IS A LIVING PLAN AND WILL  
BE UPDATED QUARTERLY TO REFLECT  
THE CHANGING LANDSCAPE.