EXECUTIVE SUMMARY

The Glenelg Shire Tourism Strategy 2015-2018 provides a framework for the development of the Shire’s tourism industry drawing on the region’s competitive strengths and aligned to the resources available to the tourism industry.

The Glenelg Shire attracts almost 500,000 visitors per annum and generates $77 million in output within the regional economy.

Tourism in Glenelg Shire is emerging; however there are a number of exceptional assets which can be further leveraged to grow tourism in the Shire. These include the Budj Bim Landscape, the Port of Portland, the region’s extensive National Parks such as the Lower Glenelg National Park, the Great South West Walk and the pastoral heritage around Casterton. Such is the quality of these assets that Glenelg has the potential to develop a tourism industry that not only draws a strong domestic market but also targets a range of international experience seeker markets.

There is however much work to do in order to realise the tourism potential of Glenelg Shire. Some of the barriers to overcome include the distance of Glenelg Shire from key source markets, the lack of a distinct brand for Glenelg’s destinations and the low awareness of Glenelg’s tourism offer and a low supply of quality accommodation.

Glenelg Shire has the opportunity to work with a number of existing organisations which will assist with destination marketing to key international and domestic markets. These organisations include the Great Southern Touring Route, Melbourne to Adelaide Touring, Great Ocean Road Regional Tourism, Limestone Coast Tourism and Grampians Tourism. Leveraging from the destination marketing initiatives of these existing organisations will go a long way to strengthening the awareness of Glenelg’s tourism product.

The online presence of Glenelg Shire’s attractions and destinations is generally poor. The strategy identifies a number of opportunities to strengthen the online presence including the development of destination and hero websites and strengthening the social media presence.

The Glenelg Shire dedicates significant resources to tourism, however more than half of this is tied to operating visitor information centres. The role of visitor information centres may be expanded to include formalised programs for industry development and development of social media and online content. Many of the leading visitor information centres in Victoria such as Bendigo and Frankston provide services that extend well beyond providing visitor information such as industry support and networking sessions, exhibitions and famils.

Since the disbandment of Discovery Coast Tourism, there has been little interaction and coordination between each of the Shire’s destination communities. There is a need to strengthen the coordination and collaboration between the Shire’s communities to ensure a consistent message is being delivered to the visitor.

Section eight and nine of this report provides key directions for tourism development in Glenelg Shire. Key directions for commencement in year one of the Tourism Strategy includes:

- Direction 1: Undertake brand development for Glenelg Shire’s key destinations;
- Direction 2: Glenelg Shire to work with surrounding Regional Tourism Organisations (RTOs) to promote its destinations to key external markets;
- Direction 6: Renew Glenelg Shire’s digital presence and align with Great Ocean Road online digital presence;
- Direction 7: Establish a social media presence of Glenelg Shire;
- Direction 20: Establish a tourism advisory group including representatives from each of the Shire’s key destinations;
- Direction 22: Undertake ongoing monitoring of the industry using primary and secondary resources including Monitor and Tourism Research Australia (TRA) Data;

It is estimated that projects which commence in year one will cost $225,000 to deliver. Some of these are one off items such as the establishment of the digital and social media presence.
1. INTRODUCTION

1.1. PROJECT OVERVIEW


The strategy provides a strategic framework to grow tourism in the Shire drawing on the competitive strengths of the Shire with consideration of the current resources available to the tourism industry.

An extensive background paper has been prepared to inform the strategy plan. This background paper included the following:

- An overview of outcomes from consultation across the Glenelg Shire including industry workshops in Portland, Casterton and Nelson;
- Assessment of visitor markets;
- Identification of product and experiences and opportunities for tourism investment;
- Digital presence of the Shire;
- Review of the organisational structure for Tourism.

This strategic plan document summarises the outcomes from the discussion paper and includes a detailed implementation strategy for tourism.

There is an extensive amount of work identified to grow tourism in Glenelg Shire and it is not possible for all directions to be implemented within a three year timeframe. The implementation plan provides recommendations on those projects which should be undertaken within a short time horizon and those which may be undertaken in future years.
2. Tourism Context

2.1. Glenelg Shire Overview

Glenelg Shire is located in the southwest of Victoria, bordering South Australia. It is approximately halfway on the Melbourne to Adelaide route. The Shire covers a total area of 6,212 square kilometres and has an estimated resident population of 19,521 (2013). The region has a number of tourism assets including expansive beaches, scenic and rugged coast, pristine National Parks and a rich indigenous and European heritage. Some of the key nature based tourism assets include:

- The Budj Bim Heritage Landscape;
- Cobboboonee National Park and Forest Park;
- Mt Clay State Forest;
- Cape Bridgewater;
- Glenelg River;
- The Lower Glenelg National Park;
- Discovery Bay Coastal Park;
- Annya State Forest; and
- Crawford River Regional Park.

These destinations provide a range of established nature-based tourism experiences including tours, camping, fishing, and bushwalking. Significant potential exists to capitalise on these existing assets and provide a greater range, and better quality experiences to increase visitor numbers and yield.

The key townships which service visitors include Portland, Heywood, Dartmoor, Nelson, and Casterton. These township destinations each have a unique offer and experience.
2.2. PRODUCT STRENGTHS

The product strengths of Glenelg Shire are shown in the following table. These consider the level of product development in Glenelg Shire compared to other destinations in Victoria. The Great Ocean Road Region is included as a benchmark.

The Great Ocean Road classification is sourced from Tourism Victoria’s Regional Action Plan. Whilst the assessment is a subjective analysis product strengths, it clearly shows that Glenelg Shire has a very strong alignment of product with the Great Ocean Road Region with nature based tourism the only primary product strength in both regions. The two areas where Glenelg could grow strongly in terms of its competitive advantage in product is in Wildlife and Indigenous tourism. Realisation of Budj Bim into an internationally ready product would see indigenous tourism become a primary strength and likewise establishment of internationally focused whale watching tours would put Portland on the international tourism map. The establishment of an iconic product has a large impact on the way a region is viewed and marketed.

History and heritage is another area that Glenelg Shire could strengthen building on the maritime and pastoral history of the region.

Interestingly arts and culture is not considered a strength of the Great Ocean Road region, however there is an emergence in the Shire, particularly around Portland and Casterton.

<table>
<thead>
<tr>
<th>TABLE 1 GLENELG SHIRE PRODUCT STRENGTHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature Based Tourism</td>
</tr>
<tr>
<td>History and Heritage</td>
</tr>
<tr>
<td>Food and Wine</td>
</tr>
<tr>
<td>Wildlife</td>
</tr>
<tr>
<td>Spa and Wellbeing</td>
</tr>
<tr>
<td>Arts and Culture</td>
</tr>
<tr>
<td>Indigenous</td>
</tr>
<tr>
<td>Golf</td>
</tr>
<tr>
<td>Adventure</td>
</tr>
<tr>
<td>Festivals and Events</td>
</tr>
</tbody>
</table>
2.3. STRATEGIC POLICY CONTEXT

Both Federal and State Governments identify the need for investment in tourism products to enable the tourism industry to meet its full potential over the coming decade. In particular, nature-based tourism is recognised as the most popular tourist draw in regional Victoria and in particular, the Great Ocean Road region.

Regional policy often reflects the perception of the Great Ocean Road region extending from Warrnambool to Torquay and does not address tourism opportunities in Glenelg Shire.

Projects for development in the Great Ocean Road region in current strategic plans that may be implemented in Glenelg Shire include:

- High end accommodation, both large scale and boutique, at key locations along the Great Ocean Road;
- Eco-lodge accommodation opportunities;
- Farm stay accommodation;
- Developing world-class visitor experiences at key national parks;
- Food and wine products such as vineyard accommodation, cellar doors and facilities that showcase regional food;
- Facilities that utilise geothermal and mineral spring resources such as day spas and health resorts; and
- The development of aboriginal cultural heritage interpretation and experiences.

Although there is a lack of strategic tourism policy for Glenelg Shire, there are a number of other strategies which incorporate tourism considerations.

Opportunities identified within the Glenelg Shire include:

- Developing iconic attractions in the region, including Glenelg River, Cape Bridgewater, Great South West Walk, Seal Viewing, and Princess Margaret Rose Cave;
- Leveraging recent improvements to Portland harbour facilities to expand recreational fishing and boating activities;
- The potential for expanded eco-tourism leveraging from National Parks;
- Securing support for implementation of the Barwon South West Regional Trail Masterplan;
- Improving accommodation in the region;
- Developing and upgrading facilities in coastal areas and national parks to support nature based tourism (e.g. trails, marine activities and national park visitor facilities); and
- Improving river camping and canoeing facilities at Nelson.

2.4. REGIONAL POSITIONING

The region is strategically positioned at the eastern entrance to the Great Ocean Road region, and in close proximity to the Grampians, Limestone Coast, and Coonawarra wine region.

Of key strategic importance for the Glenelg Shire and surrounding region is the presence of the commercial airport located 15km from Portland. This airport operates 12 passenger flights per week between Portland and Essendon (Melbourne) and is responsible for delivering between 8,000 and 10,000 air passengers into the region.

This air link between Melbourne and Portland has the potential to deliver greater incentives to both interstate and international travellers to visit the region as travel time can be greatly reduced.

The map on the following page illustrates Glenelg’s location, surrounded by prominent tourism attractions within 2 and a half hours’ drive. There are a number of touring routes which connect Victoria and South Australia including Princes Highway, Glenelg Highway, and Portland-Nelson Road.

The region has the potential to build visitation from local markets, being central to a number of major population centres; Mount Gambier, Hamilton, Warrnambool. The region is also strategically positioned on a number of popular touring routes and there is opportunity to leverage further overnight visitation and yield from touring visitors. Synergies with neighbouring regions are discussed below.
LIMESTONE COAST

The Limestone Coast on the south east coast of South Australia is a key tourism destination for potential daytrips to or from the Glenelg Shire. The majority of the attractions in the Limestone Coast region are over an hour from Portland, providing opportunities for day trips and the development of touring routes.

Key destinations on the Limestone Coast include Mt. Gambier, The Southern Ocean Shipwreck Trail, Coonawarra, Naracoorte Caves and Piccaninnie Ponds.

GRAMPIONS

The Grampians is located approximately 2 hours north of Portland, and only 1 hour from Casterton, and is a primary nature-based tourism destination for Victorians. The region shares many synergies with Glenelg: it is a popular destination for nature-based and adventure tourism, and it is also a key region for indigenous experiences in Victoria.

Data collected from the Grampians Visitor Profile and Satisfaction Project 2009 provides information on how visitors access the region. The Grampians is predominately a self-drive destination. Over 97% of visitors to the Grampians are self-drive tourists.1

Over 27% of visitors travel to the region from Melbourne via the Western Highway. A further 20% of visitors travel from Adelaide via the Western Highway, highlighting the importance of the South Australian visitor market.

Approximately 13% of visitors to the Grampians are travelling from Warrnambool / Port Fairy. This route forms part of the Great Southern Tourism Route which encourages visitors to travel north from Port Fairy, bypassing Glenelg Shire.

A small proportion of visitors are approaching from Coonawarra and Robe. The lack of highway links between these towns and the Grampians is a barrier currently hindering the potential for visitors to travel between the regions.

GREAT OCEAN ROAD REGION

The Great Ocean Road Region (GOR) is home to world class tourism assets. The GOR provides visitors with an array of experiences including food and wine, nature based and shopping experiences.

Glenelg Shire and particularly the southern coastal area of Glenelg Shire aligns well with the product strengths of the Great Ocean Road. These strengths include nature based tourism and maritime heritage.

The Great Ocean Road Region attracts the largest number of international visitors of all regional Victorian tourism regions and provides opportunity for Glenelg Shire to leverage from the strong international brand awareness of the region and its icons.

1 The Grampians Visitor Profile and Satisfaction Project
2.5. VISITATION OVERVIEW

Analysis of the Glenelg visitor profile, within the context of the Great Ocean Road (GOR) region and Regional Victoria markets, shows the following:

- Glenelg Shire receives a significantly higher proportion of overnight and daytrip visitors from both Regional Victoria and South Australia, than the GOR region. It shows that the local region (western Victoria) and South Australia are important markets;

- Holiday and leisure is the main purpose of visit to the Shire, followed by visiting friends and relatives. Glenelg Shire also receives a high proportion of business visitation, driven by industry and port activities in Portland;

- Overnight domestic visits attract proportionally higher numbers of people undertaking arts/heritage/festival activities, sports and outdoor/nature based activities; when compared to the GOR region or Regional Victoria. Fishing in particular is a popular activity. This illustrates the strength of the nature based and cultural heritage markets which capitalise on the region’s extensive nature based and indigenous assets;

- Glenelg attracts a higher proportion of visitors who are either bush camping or staying in a commercial campground when compared to Regional Victoria or the GOR Region. A larger proportion of visitors to the Shire also stay in motel and guest house accommodation than other regions. The data reflects the type and distribution of the accommodation stock in Glenelg Shire;

- Analysis of visitor lifecycle group highlights the importance of retiree/grey nomad markets and families to Glenelg Shire. 41% of all overnight visitors to Glenelg are ‘older persons’ or retirees, significantly higher than the GOR region (33%) or Regional Victoria (33%);

- An estimated 486,862 people visited the Glenelg Shire in 2013, including 228,825 overnight and 258,037 daytrip visitors. 148,634 of overnight visitors stay in paid accommodation (such as motels and caravan parks). The remainder stayed in their second (holiday) home or with friends or relatives.

Detailed analysis of Glenelg’s visitor profile is provided in the Glenelg Tourism Background Report 2014.

**TABLE 2 TOTAL VISITATION TO GLENELG SHIRE**

<table>
<thead>
<tr>
<th>Category</th>
<th>Visitor Days</th>
<th>Total Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Visitors Staying with Friends/Relatives</td>
<td>100,106</td>
<td>28,602</td>
</tr>
<tr>
<td>Number of Visitors Staying in Holiday Homes</td>
<td>188,672</td>
<td>51,590</td>
</tr>
<tr>
<td>Number of Visitors Staying in Commercial Accommodation</td>
<td>431,953</td>
<td>123,415</td>
</tr>
<tr>
<td>Number of Visitors Staying in Caravan Parks/Campgrounds</td>
<td>94,568</td>
<td>25,218</td>
</tr>
<tr>
<td>Number of Visitors Staying in Paid Accommodation</td>
<td>526,522</td>
<td>148,634</td>
</tr>
<tr>
<td>Total Number of Overnight Visitors</td>
<td>815,300</td>
<td>228,825</td>
</tr>
<tr>
<td>Total Number of Daytrip Visitors</td>
<td>258,037</td>
<td>258,037</td>
</tr>
<tr>
<td>Total Number of Visitors</td>
<td>1,073,337</td>
<td>486,862</td>
</tr>
</tbody>
</table>

Source: PAVE, Urban Enterprise 2014
2.6. KEY MARKET SEGMENTS

The analysis of the visitor market identifies the following segments as critical to driving tourism in Glenelg.

- **Older Travellers / Grey Nomads** - older travellers and grey nomads currently form a large proportion of visitation to the region. They represent a fast growing market segment that provides steady visitation and strong passing trade. They are generally a lower yielding segment and often prefer to stay in a form of caravan/camping accommodation or motels.

- **Experience Seeking International Visitors** - whilst the international market does not provide significant visitation for the region at present, it is a market segment that will be drawn by the development of a world class asset at Budj Bim and key nature based tourism icons (e.g. GSWW). Experience Seekers are more likely to visit regional areas, stay longer in the region and have a higher than average yield. They value personal interaction with natural and cultural values and require a high quality visitor experience.

- **Families** - families often visit friends and relatives or visit for holiday and leisure, seeking to stay in motels, caravan parks or self-contained rental homes. On average, they spend more money than the average traveller and like to visit nature, wildlife and history and heritage attractions.

- **Outdoor Enthusiasts** - the region’s outdoor assets draw large numbers of visitors engaged in bushwalking, fishing, boating and camping. In comparison to other regions, Glenelg can offer a more ‘immersive’ experience with remote and pristine National Parks. Opportunities to increase yield and local spending from these markets should be considered.

- **Socially Aware** - socially aware travellers are generally well-educated, socially active, and technologically up to date. They enjoy natural and cultural experiences such as food and wine experiences, National Parks, swimming, surfing and wildlife. Socially aware travellers are generally high yielding and prefer hotel or self-contained accommodation when they travel.

2.6.1. ALIGNMENT WITH KEY MARKETS

Table 2 below provides a summary of the alignment of key market segments with the tourism assets of the region. It illustrates that the market segments align strongly with the existing and potential tourism offer in the region.

**TABLE 3 ALIGNMENT WITH KEY MARKET SEGMENTS**

<table>
<thead>
<tr>
<th>Tourism Product</th>
<th>Victorian Market Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cultural / Indigenous</strong></td>
<td>Socially Aware</td>
</tr>
<tr>
<td></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td></td>
<td>Families</td>
</tr>
<tr>
<td><strong>Adventure Activities (cycling, mountain biking, kayaking)</strong></td>
<td>Socially Aware</td>
</tr>
<tr>
<td></td>
<td>Families (moderate activities)</td>
</tr>
<tr>
<td></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td><strong>Wildlife</strong></td>
<td>Families</td>
</tr>
<tr>
<td></td>
<td>Socially Aware</td>
</tr>
<tr>
<td></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td><strong>Walking / Hiking and Camping</strong></td>
<td>Families</td>
</tr>
<tr>
<td></td>
<td>Older Travellers</td>
</tr>
<tr>
<td><strong>Private Vehicle Touring</strong></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td></td>
<td>Older Travellers</td>
</tr>
<tr>
<td><strong>Attending Events</strong></td>
<td>Socially Aware</td>
</tr>
<tr>
<td></td>
<td>Families</td>
</tr>
<tr>
<td></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td><strong>Wineries and Local Producers</strong></td>
<td>Socially Aware</td>
</tr>
<tr>
<td></td>
<td>Experience Seekers</td>
</tr>
<tr>
<td></td>
<td>Older Travellers</td>
</tr>
</tbody>
</table>
### 2.6.2. Niche Markets

In addition to the main visitor markets, there are also a number of niche markets which are attracted to unique experiences in Glenelg and contribute significantly to visitation. These include:

- **Fishing and boating.** The region is a fishing hotspot with visitors drawn from long distances for tuna and game fishing. Fishermen make up a significant proportion of visitors to the region.

- **Birdwatching.** The region is known for its unique bird species and attracts many keen birdwatchers.

- **Groups (School, Rowing, Scouts).** Due to the region’s outdoor strengths, they receive a large number of outdoor education groups, especially in Nelson which is in close proximity to the Lower Glenelg National Park.

- **Cruise Ship Visitors.** Cruise ships are an emerging market for the Glenelg region. Portland received its first cruise ship in March 2014 – the MS Europa, a luxury vessel from Europe carrying 330 passengers. The event provided a major boost to the local economy with a community market arranged with more than 80 stalls and live music.

Over the next three years 8 more cruise ships are booked to arrive in Portland. This includes larger vessels such as the P&O Pacific Jewel which has a capacity of 1,950 passengers. The 2014 cruise ship season saw 4 vessels arrive in Portland (Pacific Pearl x 2 & Pacific Jewell x 2). The economic benefits to the local and regional economy was estimated to be between $3 million - $4 million. The increasing number of arriving cruise ship liners is a significant on-going economic opportunity for the region. Cruise ship visitors are generally higher yielding segments and have greater expenditure in the local area. Initiatives to maximise yield from cruise ship visitors (both passengers and local visitors who are drawn to Portland to view the ships) should be considered within the Tourism Strategy.

### 2.7. Tourism Impact

#### 2.7.1. Tourism Output

Figure 3 shows the gross revenue generated by businesses and organisations in Glenelg. The tourism sector contributes approximately $77 million, or 2.8% of Glenelg’s total output.

**FIGURE 3 GLENELG INDUSTRY OUTPUT**

Source: REMPLAN Glenelg Shire Profile 2014
2.8. Tourism Employment

Figure 5 shows the number of employees whose place of work is located within Glenelg. Tourism directly contributes 488 jobs to the local economy, accounting for 7% of local employment. It should be noted that there is also indirect benefits which are not accounted for within REMPLAN modelling. The indirect impact of tourism on other sectors such as construction (new holiday homes or lifestyle properties) and service industries (real estate, clearing services, linen services, and service stations) would have a significant impact on the local economy.

Source: REMPLAN Glenelg Shire Profile 2014
3. TOURISM PRODUCT

3.1. INTRODUCTION

Below is a summary of tourism product and tourism investment opportunities in Glenelg Shire. This draws on a detailed product audit and consultation with the tourism industry in Glenelg Shire.

3.2. ACCOMMODATION

An accommodation audit for Glenelg Shire identified 146 accommodation establishments, with 29 of these being bush campsites. Anecdotally, there are a number of informal and unquantified campsites in the Shire, such as those along the Great South West Walk; as the capacity and scale of these sites is difficult to assess they are therefore excluded from total capacity.

Glenelg currently has a limited range of accommodation. Much of the hotel/motel stock is concentrated in Portland. Outside of Portland, the vast majority of accommodation is either camping or caravan parks. **There is opportunity to expand the following accommodation types:**

- **Self-contained units/accommodation** – catering for families and socially aware visitors seeking nature based and cultural experiences;
- **Farm stay** – linked to the nature based offer and targeted at visitors seeking nature based, cultural and local produce experiences; and
- **Fixed eco/cabin accommodation** in or close to nature-based assets and National Parks.
- **Branded accommodation** e.g. BIG 4, RACV
3.3. FOOD AND HOSPITALITY

In recent years, dining options have become an increasingly important aspect of the regional tourism experience. Although dining experiences are generally not the primary motivation for people to visit a region there are a number of examples of destination dining establishments generating significant visitation (e.g. Royal Mail Hotel, Dunkeld).

There are no high profile destination dining options in the Glenelg region. Portland offers the biggest range of establishments to cater for all segments of the visitor market, from higher end establishments such as Fergie’s Café and Wine Bar and Edwards on the Waterfront, to pub meals (such as Mac’s Hotel and the Gordon), Asian (Seaview Indian), takeaways and fast food.

Considering the agricultural strengths of the region there is minimal availability of local produce. The region would benefit from increased quantity, accessibility and availability of cellar door or local produce experiences. These experiences could be linked to local produce stores or markets in the region.

Considering the region’s coastal attractions and reputation as a fishing destination there is a clear gap in quality seafood dining establishments. Quality seafood dining has been identified as a clear opportunity across the Great Ocean Road region.

3.4. EVENTS

There are a number of events across Glenelg Shire which attract significant visitation each year. These include, but are not limited to:

- The Upwelling Festival;
- The Wood, Wine and Roses Festival;
- Australian Kelpie Muster.

Whilst the region hosts a range of events, there may be an opportunity to build on the reputation of and leverage from existing events and region’s nature-based strengths. Opportunities may include:

- Sporting and adventure events - that capitalise on the area’s natural assets, such as multi-day sports and organised adventure events; and
- Indigenous - which showcase and celebrate the indigenous heritage of the area.

3.5. HERITAGE

The region has a rich history and heritage of both indigenous and European settlement. Some of the key heritage points of interest include:

- Portland - Portland was the first European settlement in Victoria. The town centre still contains a number heritage buildings and attractions. Some of the main attractions include:
  - Cable Tram - Portland’s Cable Tram links the Portland Botanic Gardens, Portland Maritime Discovery Centre, Powerhouse Vintage Car Museum, WWII Memorial Lookout Tower and the Cable Tram Museum.
  - Maritime Discovery Centre - The region has a rich maritime history including being Victoria’s first port and past whaling industry, which is showcased in the Discovery Centre which is attached to the Portland Visitor Information Centre (VIC).
  - Powerhouse Car Museum - A unique collection of vintage and classic cars, motorbikes tractors, and cable tram memorabilia.
  - History Trail - the Portland CBD contains over 200 buildings from the 1800s and there is a self-guided history walk.

- Pastoral heritage - Merino was the first Victorian inland settlement when in 1837 Francis Henty established the Merino Downs station. Casterton and the surrounding region are known as the ‘Birthplace of the Kelpie’ with an annual Australian Kelpie Muster held over the June long weekend. The town also has a number of heritage buildings and attractions. The region surrounding Casterton provides picturesque countryside for touring visitors.

- Mary MacKillop - The region played an important role in the life of Saint Mary MacKillop who lived and worked in the region in the 1800s. There is a touring route in the region and there may be an opportunity for a ‘camino’ path for pilgrims from Portland to Penola in South Australia.

- Townships - The region's smaller villages - Dartmoor, Merino, Heywood, Narrawong, Digby have a number of heritage points of interest which link with early
explorers and pioneers such as the Major Mitchell the Henty brothers, and provide the opportunity to connect with a village touring route.

The region has a rich history and heritage of both indigenous and European settlement. Opportunities to better showcase the region’s heritage may include village touring routes, improved interpretation and signage and promotion to niche markets e.g. pilgrims to the Mary MacKillop trail.

3.6. ARTS AND CULTURE

Glenelg Shire has an emerging arts and cultural scene focused in Portland and surrounds and in Casterton. There is opportunity to better showcase local artisans, indigenous art, culture and produce within stores, cafes, and markets. Public art may also be considered in the region’s destination towns to strengthen the appeal of townships and build on the emerging arts and cultural activity in the Shire.

A public art masterplan has been prepared for Glenelg Shire which aligns with the opportunity identified above.

3.7. NATURE BASED TOURISM

Nature-based tourism is a key strength of the Glenelg region. The region contains a number of iconic and high quality nature based assets and experiences. The icons, which have the appeal and potential to attract far reaching markets include:

- **The Budj Bim Heritage Landscape / Mount Eccles** - together with Lake Condah, Budj Bim is a nationally and internationally important cultural and heritage landscape which is a unique draw for the region. Budj Bim provides the opportunity to create a true world class cultural attraction with the ability to draw visitation from national and international markets. It is currently under consideration for UNESCO World Heritage Status.
- **Cape Bridgewater / Discovery Bay Coast** - the area provides beaches, unique geological and volcanic features, lakes and spectacular coastal walk/views. It is also unique in providing opportunities to view marine wildlife (such as seals and blue whales) as part of the offshore upwelling phenomena.
- **The Lower Glenelg River** - the river provides a unique landscape which is framed by steep gorges and caves, as well as providing iconic sections of the Great South West Walk. Canoeing is a major attraction and can be safely undertaken downstream from Dartmoor to Nelson (four day trip).
- **Great South West Walk**. The Great South West Walk (GSWW) provides one of the region’s truly iconic attractions, including a 250km loop that takes in forest, river and coastal landscapes between Portland and Nelson. The following figure illustrates the route of the GSWW. There are approximately 17 short walks along the GSWW which can be experienced by walkers of different levels. The Great South West Walk has good quality infrastructure and links to most of the regions key natural icons. There is significant opportunity for the walk to draw in greater levels of visitation through improved digital marketing and information distribution.

Other natural assets include:

- Princess Margaret Rose Cave;
- Cobboboonee National Park and Forest Park;
- Mt Clay State Forest;
- Mount Richmond National Park; and
- Annya State Forest.
- Nangeela State Forest

The following diagram provides an indication of visitation to key National Parks in the South West Region. It illustrates that the Lower Glenelg National Park receives a high level of visitation in the region, followed by Cobboboonee National Park and Budj Bim (Mount Eccles National Park).

The natural and cultural assets of the region are extensive; however there are significant gaps in “activating” and growing yield and visitation from these assets. This includes:

- Interpretation of natural and cultural assets;
- Tours and activity businesses;
- Eco/nature based accommodation;
- High quality tracks and trails infrastructure to support activities;
- Better marketing and promotion of the nature experiences.
The region’s indigenous cultural assets including Budj Bim is a nationally and internationally important cultural and heritage landscape which is a unique draw for the region. Budj Bim provides the opportunity to create a true world class cultural attraction with the ability to draw visitation from national and international markets.

One of the key opportunities for Glenelg Shire is the development of Portland as an internationally ready whale watching destination. An example of this is Kaikoura in New Zealand which has been developed into an international whale watching hub. Further improvement to mooring infrastructure and the establishment of the Visitor Information Centre as a whale watching hub would assist in achieving this goal. It is understood that protected waters of the Port of Portland and Portland Bay provide an excellent opportunity for whale watching most of the year.
3.7.1. NATIONAL PARK VISITATION
4. Tourism Resources

4.1. Introduction
This section provides an overview of resources dedicated to enhancing tourism, specifically focusing on organisations and digital resources.

4.2. Governance and Resourcing
An outline of the tourism industry structure is shown in the figure opposite. There are five (5) local organisations which operate like a local tourism association, including:

- Portland Tourist Association;
- Nelson Tourist Association;
- Promoting Heywood;
- Dartmoor Progress Association; and
- Casterton Business and Development Association.

Until 2009 there was a regional tourism organisation - Discovery Coast Tourism (DCT). DCT was an incorporated body which was structured with representatives from each Local Tourism Association (LTA) as well as 2 Council representatives. Since 2009 Council has become the main tourism development authority in the region, and Portland Tourist Association (PTA) has played a greater regional role having recently published a regional tourism booklet. It would be beneficial to consider the development of a regional tourism network to enhance the marketing and promotion of the Glenelg Shire.

Council dedicates substantial resources to tourism with $935,000 spent on tourism and visitor information services staff and operation costs for its Visitor Information Centres in Portland, Nelson and Casterton. The Glenelg Tourism Strategy must respond to the existing budget dedicated for tourism.
4.3. DIGITAL RESOURCES

4.3.1. WEBSITES

The following are the key tourism websites relevant to promoting Glenelg Shire:

http://www.visitvictoria.com/
http://www.casterton-kelpies.org/

Table 4 shows the global ranking of relevant tourism websites in Glenelg (government websites cannot be ranked, therefore the Council website has been omitted). The results show that the destination websites have a much lower visitation than the state and regional websites, and highlights the challenges of marketing individual destinations. Gaining awareness through regional and state platforms is important to building the awareness of the region.

<table>
<thead>
<tr>
<th>Site</th>
<th>Global Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit Victoria</td>
<td>93,674</td>
</tr>
<tr>
<td>Visit Great Ocean Road</td>
<td>660,877</td>
</tr>
<tr>
<td>Visit Portland</td>
<td>4,798,258</td>
</tr>
<tr>
<td>Nelson</td>
<td>7,601,381</td>
</tr>
<tr>
<td>Casterton</td>
<td>14,257,751</td>
</tr>
</tbody>
</table>

The review shows that there are no stand-out online assets to promote the Glenelg region as a tourism destination. Visit Great Ocean Road is the stand-out digital destination for visitors wishing to explore regional Victoria along the Great Ocean Road. However, Glenelg is not currently a full financial member of GOR tourism and has minimal presence on the website.

The Glenelg region and attractions do not as yet have an integrated approach to destination marketing in the online space, and a significant opportunity exists for the region to create, develop and grow an integrated online presence that highlights the destination, attractions, packages and experiences available in the immediate area and beyond. Opportunities exist to leverage from potential World Heritage sites (Budj Bim), cruise ship visitation, whale watching attractions and camping and natural attractions to an increasingly global market visiting Victoria.

There are two methods which Glenelg can help build its online presence:

- Leverage from GOR Tourism to utilise their marketing and online platform to ensure that destinations and attractions are given greater exposure. This would require Glenelg becoming a paid member of GOR Tourism;
- Develop and support a ‘hero site’ that engages visitors, optimises search engine marketing, creates strong social media content marketing channels and highlights the region’s attractions. With the opportunities that will present via cruise ships and heritage sites in the region, it is arguable that a standalone destination marketing portal for the online assets has some merit, and would have the added benefit of closely involving local operators and businesses. It also provides opportunities to launch the brand as a renewed tourism offering to the visitors to Victoria, and to local visitors visiting regional Victoria.
4.3.2. Social Media

Over the past decade social media has emerged as a key visitor information source and market tool. As visitor engagement with the online world increases, it is important for destinations to improve the profile and brand strength through social media platforms. In addition, mobile digital platforms (smartphones and tablets) are increasingly being used by visitors whilst on holiday to gain information on destinations, and make decisions on where to visit.

The Glenelg region currently has little presence on social media which represents a key gap in promoting the region. Table 5 lists the main tourism organisations and websites and their integration with social media. It is clear that some effort has been assigned to most of the sites and assets, however, there is no full integration with the most popular social media channels from any one site, with the exception of Visit Great Ocean Road. For example, an Instagram stream exists for Visit Portland, but this is not connected to the Facebook page, where the largest audience is captured.

The review also showed that few local operators have harnessed the power of review sites such as Trip Advisor to allow visitors to view user-generated content that they could re-purpose into their own content marketing schedules. Sites such as TripAdvisor offer a range of services to commercial operators to allow them to access, engage with and re-market to users. It is also possible to negotiate a partnership arrangement with review sites to allow their content feed and updates to be included in links to home sites for operators or organisations.

Regardless of the marketing model chosen, the social media content marketing undertaken by the Glenelg Shire Council needs to be integrated, consistent, persistent and ongoing, to assist visitors to choose to visit Glenelg. However, the content marketing strategy will be dependent on which marketing model is chosen, and can be developed further once a clear direction is established.

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Instagram</th>
<th>Twitter</th>
<th>Facebook</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glenelg Shire Council (glenelg.vic.gov.au)</td>
<td>No</td>
<td>311 followers</td>
<td>2,020 followers</td>
<td>No</td>
</tr>
<tr>
<td>Budj Bim Tours (budjbimtours.com.au)</td>
<td>No</td>
<td>No</td>
<td>47 followers (Inactive since 2010)</td>
<td>No</td>
</tr>
<tr>
<td>Portland Tourist Association (visitportland.com.au)</td>
<td>169</td>
<td>No</td>
<td>638 followers</td>
<td>No</td>
</tr>
<tr>
<td>Upwelling Festival (upwellingfestival.com.au)</td>
<td>No</td>
<td>26 followers</td>
<td>1,273 followers</td>
<td>No</td>
</tr>
<tr>
<td>Whale Watching Victoria (whalemail.com.au)</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Great Ocean Road Tourism</td>
<td>19,376 followers</td>
<td>2,511 followers</td>
<td>12,836 followers</td>
<td>Yes</td>
</tr>
<tr>
<td>Portland Observer and Guardian (spec.com.au)</td>
<td>No</td>
<td>140 followers</td>
<td>2,462 followers</td>
<td>No</td>
</tr>
<tr>
<td>Travel Victoria (travelvictoria.com.au)</td>
<td>No</td>
<td>4,127 followers</td>
<td>4,234 followers</td>
<td>No</td>
</tr>
<tr>
<td>Portland Fishing Charters (portlandfishingcharters.com.au)</td>
<td>No</td>
<td>No</td>
<td>1,539 followers</td>
<td>No</td>
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<tr>
<td>Nelson, Victoria (nelsonvictoria.com)</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Casterton, Victoria (casterton.org.au)</td>
<td>No</td>
<td>No</td>
<td>387 followers</td>
<td>No</td>
</tr>
<tr>
<td>Casterton Kelpie Assoc. (<a href="http://www.kelpies-casterton.org">www.kelpies-casterton.org</a>)</td>
<td>No</td>
<td>200 followers</td>
<td>1,200 followers</td>
<td>No</td>
</tr>
</tbody>
</table>
5. STRATEGIC FRAMEWORK

5.1. INTRODUCTION

This section provides directions for tourism development in the Glenelg Shire. The directions draw on key issues and opportunities discussed in earlier sections.

There are three key strategic themes that have emerged from the assessment of data and consultation that will shape tourism development within Glenelg. These themes are described below in detail and include:

- **Destination Marketing** - branding, marketing, digital presence;
- **Destination Development** - products, services, experiences, infrastructure;
- **Industry and Governance** - policy, management, resourcing.

The key directions for each theme are listed and discussed below.

5.2. DESTINATION MARKETING

5.2.1. BRANDING

The Discovery Coast brand was utilised for the Glenelg Shire as a regional tourism brand. With the loss of Discovery Coast Tourism, the brand is no longer being used extensively to market the Glenelg Shire. Anecdotally there is very low awareness of "Discovery Coast" and the region it represents in the market place.

Focusing brand development on Glenelg’s destinations within an overall strong singular brand is likely to have a much greater cut through in the market. Key destinations for branding may include:

- Portland, Cape Bridgewater and Surrounds;
- Nelson and Lower Glenelg National Park;
- Heywood and Budj Bim;
- Casterton and surrounds.

Branding these destinations will allow the individual strengths of each destination to be incorporated in destination marketing. Branding and developing information about each subregion will also allow flexibility in marketing, for instance Nelson could link to Limestone Coast marketing, Heywood and Budj Bim could link with Great Ocean Road Tourism marketing, and Casterton and surrounds can link with Grampians marketing.

DIRECTION 1: UNDERTAKE BRAND DEVELOPMENT FOR GLENELG’S KEY DESTINATIONS

This branding should be reflected in any future collateral and the Shire’s digital presence. It is not important to develop slogans for each area but have a clear understanding of the brand essence for each location. For instance branding for Portland, Cape Bridgewater and Surrounds should focus on nature based assets and heritage; Nelson and Lower
Glenelg should focus on wilderness experiences; Heywood and Budj Bim, should focus on indigenous heritage; and Casterton should build on its pastoral heritage.

### 5.2.2. DIVERSE MARKET ORIGIN FOR GLENELG DESTINATIONS

Glenelg Shire is expansive and is comprised of a diverse range of landscapes and destinations. This diversity means that each destination has unique market:

- **Nelson:** Higher proportion of South Australian visitors, touring visitors, and a summer focused destination.
- **Portland:** Higher proportion of visitation from Victoria, greater numbers of business and visiting friends and relatives (VFR) market, and emerging cruise ship market.
- **Casterton:** Equal split between VIC and SA visitors, older travellers, and more of a boutique destination.
- **Heywood:** Similar market base to Portland. May have potential to grow the touring market.

It will be important that marketing strategies acknowledge the different geographic markets for each of Glenelg’s destinations. This is reflected in the map shown in the figure opposite.

### DIRECTION 2: GLENELG SHIRE TO WORK WITH SURROUNDING RTOS TO PROMOTE ITS DESTINATIONS TO KEY MARKETS

Glenelg is positioned between a number of other tourism regions which are well known destinations and have a greater market presence. Developing relationships with these regions and leveraging from their marketing platforms should be considered. These linkages include:

- **GOR region - Portland and Heywood** (including surrounds - Cape Bridgewater, Budj Bim)
- **Limestone Coast - Nelson**
- **Grampians - Casterton**
5.2.3. TOURING MARKET

Due to the distance from major population centres, touring visitors make up a large proportion of visitors to the Glenelg Shire. However, many touring visitors are either passing through, or are only staying for one night, on their way to another destination. The reason for this is lack of awareness of tourism product. Leveraging greater yield from touring visitors and relationships with touring operators should be considered in the Strategy. This includes Melbourne - Adelaide, Grampians - Coonawarra, and Great Southern Touring Route. Developing and promoting regional and packaging of activities will strengthen the length of stay of the touring market.

DIRECTION 3: GLENELG SHIRE TO WORK WITH ESTABLISHED TOURING ROUTES AND TOUR COMPANIES TO ENSURE ITS DESTINATIONS ARE PROMOTED TO THE TOURING MARKET

Glenelg Shire should establish a relationship with the Great Southern Touring Route and Melbourne-Adelaide Touring organisations. This will help to increase international and interstate touring visitors.

5.2.4. CREATE ICONIC DESTINATIONS

The Glenelg region contains a number of destinations, which if marketed well, may become an 'iconic' destination in the region. These include the GSWW, Cape Bridgewater, Budj Bim, and Lower Glenelg National Park. Some of these assets are 'visitor ready' and others need further development. Both the GSWW and Lower Glenelg National Park have reasonable levels of signage, infrastructure and access. The GSWW would benefit greatly by improved digital presence with high quality information for potential visitors.

The number of differently named national and state parks in the region may be an issue for branding nature based tourism. Successful nature based destinations in Australia usually rely on having one iconic national park, examples include Alpine National Park, Grampians National Park, Otway National Park. Council should work with Parks Victoria in regards to the brand and naming of national parks in Victoria’s south west with the aim to create a large iconic national park that may take in Cobboboonee National Park, Lower Glenelg National Park and Discovery Bay Coastal and Marines Parks.

DIRECTION 4: ESTABLISH A NEW NATIONAL PARK BRAND IN THE GLENELG SHIRE’S SOUTH EAST TO STRENGTHEN THE APPEAL OF THE NATURE BASED ICONS OF THE AREA

DIRECTION 5: UNDERTAKE A BRAND REFRESHMENT/DEVELOPMENT AND MARKETING STRATEGY FOR GREAT SOUTH WEST WALK

Work with the Great South West Walk Group and Parks Victoria to establish a new brand and marketing strategy. This will primarily focus on the improvement on online content. This task may be undertaken in conjunction with Glenelg Shire wide brand and digital presence development, and also align with the outcomes of the Barwon South West Trail Strategy.

5.2.5. DIGITAL PRESENCE

The Glenelg region and attractions do not as yet have an integrated approach to online destination marketing. This is considered a key gap in the marketing and promotion of the region. Developing the online presence of the region will require either one, or a combination of the following approaches:

- Leverage from GOR Tourism to utilise their marketing and online platform to ensure that destinations and attractions are given greater exposure. This would require Glenelg becoming a paid member of GOR Tourism;
- Develop and support a 'hero site' that engages visitors, optimises search engine marketing, creates strong social media content marketing channels and highlights the region’s attractions;
- Focus on destinations and sub-regions. Visitors will visit geographic destinations but do not have any interest in Shire boundaries.

Social media is increasingly being used by visitors to obtain visitor information as well as providing a cost-effective method for marketing and promotion. Social media is currently underutilised by Glenelg Shire and local tourism operators, and integration between social media platforms is poor.
DIRECTION 6: RENEW GLENELG SHIRE’S DIGITAL PRESENCE AND CROSS POLLINATE WITH GREAT OCEAN ROAD ONLINE DIGITAL PRESENCE (INCREASED TOUCH-POINTS AND ROUTES OF ENTRY TO GSC TOURISM INFORMATION)

DIRECTION 7: ESTABLISH AND PROMOTE A SOCIAL MEDIA PRESENCE

5.3. DESTINATION DEVELOPMENT

5.3.1. PORTLAND REVITALISATION AND ACTIVATION

The township of Portland is the largest in the region and a tourism hub for a large proportion of visitors to the region. However, there are number of issues which are impacting on its function as a tourism town. These include:

- **Creating a tourism precinct.** Bentinck Street with its outlook over the Port and heritage buildings and large sites provides a framework to develop an appealing tourism precinct.

- **Better links between the foreshore and CBD.** A large amount of investment has occurred in Portland’s foreshore and in order to strengthen the town, greater links between the tourism activities on the foreshore and the town should be investigated.

- **Improved streetscapes.** Overall Portland would benefit from improvement in the quality of streetscapes through plantings, furniture and treatments. In other locations this has lead to attracting investment in commercial buildings and attracting new innovative businesses to town.

- **Improved retail and hospitality offer.** Overall the food and retail offer in Portland needs improvement to meet contemporary visitor expectations. There are some businesses which are successful in providing a quality offer to visitors, however there is little in the way of retail targeted to the tourism sector (crafts, antiques etc.) or quality dining.

- **Art and culture.** Portland being a heritage town provides an excellent backdrop for arts and cultural activities and has an emerging arts and cultural sector. This could be capitalised upon further for tourism.

Newcastle in NSW provides an excellent example of an industrial port town which has transitioned into a strong cultural and tourism hub. Portland can look to other examples of industrial towns which have embraced revitalisation.

The Portland Integrated Growth Plan is an existing document and any future developments should be aligned to any previously agreed directions contained within this document.
DIRECTION 8: UNDERTAKE A DETAILED STRUCTURE PLAN AND URBAN DESIGN FRAMEWORK FOR PORTLAND

A detailed structure plan should incorporate streetscape improvements, identification of underutilised spaces, design guidelines, improved linkages to the foreshore, strengthening and establishment of CBD precincts including a tourism precinct.

DIRECTION 9: ESTABLISH A REGIME OF PLACE MAKING INITIATIVES FOR PORTLAND

An ongoing program of place making should be undertaken for Portland CBD. This includes working with property owners to establish pop-ups, establishment of a program of events, establishment of artistic interventions in public and private space. These opportunities may be realised through collaboration with the Portland Tourist Association, and other local groups (Committee for Portland, Portland Young Professionals).

5.3.2. BUDJ BIM

Budj Bim is considered a key product development opportunity, which if developed, could have a significant impact on the region. It is a nationally and internationally important cultural and heritage landscape which is a unique draw for the region. Budj Bim is currently being considered for UNESCO World Heritage Status, which if successful, is anticipated to bring significant attention to the region. Work has been completed on a Budj Bim Master plan on behalf of the Gunditj Mirring Traditional Owners Aboriginal Corporation. Support in implementing the findings of the master plan should be considered in the Strategy.

DIRECTION 10: CONTINUE TO SUPPORT THE GUNDITJMARACULTURAL TOURISM IN A READY CULTURAL TOURISM ATTRACTION

5.3.3. VILLAGE TOURING ROUTE

The region's smaller villages - Dartmoor, Merino, Heywood, Narrawong, Digby have a number of heritage points of interest which link with early explorers and pioneers such as Major Mitchell and the Henty brothers, and provide the opportunity to connect with a village touring route. A route of Glenelg’s inland towns could be capitalised on by private touring vehicles, car clubs and cyclists.

DIRECTION 11: ESTABLISH A NOMINATED INLAND TOUR UTILISING SEALED BACK ROADS THAT LINK GLENELG’S VILLAGES

5.3.4. TOWNSHIP IMPROVEMENT

Creating interesting and well-presented towns will be critical to the development of Glenelg as a tourism destination.

The Heywood community have identified a number of improvements which could substantially improve the town’s presence and visitor experience.

Nelson, is located within a significant nature based setting. It is understood an action plan for Nelson’s improvements has been undertaken by the Committee of Management. Building on this work to create a tourism focused master plan is considered important for the development of a sense of place.

Casterton has one of the most naturally beautiful heritage streetscapes in Western Victoria and further development of a retail and food offer could strengthen Casterton as a stopover location.

Casterton is fortunate to be located along the Glenelg River which provides a natural setting for the southern part of the township. There is opportunity for landscape improvements to the parkland making them a more pleasant place to stop. Improvement plans should be aligned with the current activities of the Committee of Management.

DIRECTION 12: ADVOCATE FOR IMPROVEMENTS TO GLENELG RIVER PARKLAND IN CASTERTON
5.3.5. Nature-Based Tourism

Glenelg’s nature-based assets are the region’s key tourism strength. Greater investment and marketing of the key natural attractions should be considered in the Strategy. This includes improving:

- Access;
- Signage;
- Eco-accommodation opportunities;
- Activities (e.g. horse riding, mountain biking in Mt Clay).

The draft Heywood Nature Based Tourism Strategy identifies a number of opportunities for product and infrastructure improvements for nature based assets. Council may consider working closely with Parks Victoria to realise these opportunities.

**Direction 13: Investigate and Promote Nature Based Tourism Opportunities in Glenelg Shire**

Nature-based opportunities identified include:

**Portland**
- Whale watching tours from Portland;
- Game fishing tours from Portland;
- Overnight fixed accommodation along the Great South West Walk;
- Cycling trails to Cape Nelson and Cape Bridgewater;

**Great South West Walk**
- Multi-sport Adventure event for the Great South West Walk;
- Package and promote shorter sections of the Great South West Walk including: the Lower Glenelg River, sections of the Discovery Bay Coastline and Cape Bridgewater and surrounds.
- Overnight fixed accommodation to sustain the Great South West Walk.
- Tour companies to support the Great South West Walk.

**Budj Bim**
- Nature based and indigenous themed accommodation;
- Improved accessibility, tracks and trails and landscaping;
- Interpretation.

**Nelson and Lower Glenelg Park**
- Nature based or eco-lodge style fixed accommodation;
- Shipwreck Coast trails;
- High quality short nature walks;

**Cape Bridgewater and Surrounds**
- Major resort-style development and/or high quality tourist park;
- Seal and other wildlife tours;
- Cycling and trail network;
- Wildlife viewing areas.

**Casterton and Surrounds**
- Walking Trails – Kelpie Trail;
- Flora & Fauna - endangered Red Tailed Black Cockatoo;

5.3.6. Accommodation Offer

Glenelg currently has a limited range of accommodation. Much of the hotel/motel stock is concentrated in Portland. Outside of Portland, the vast majority of accommodation is either camping or caravan parks. There is opportunity to expand the following accommodation types:

- **Self-contained units/accommodation** catering for families and socially aware visitors seeking nature based and cultural experiences;
• Farm stay linked to the nature based offer and targeted at visitors seeking nature based, cultural and local produce experiences; and

• Fixed eco/cabin accommodation in or close to nature-based assets and National Parks;

• Branded accommodation or tourist parks e.g. BIG 4 and RACV resorts;

Promotion of accommodation opportunities may be undertaken through a prospectus. Packaging information from the tourism strategy including audit information and visitation data, and data collected through the ‘Monitor’ system (Direction 23) will support this.

DIRECTION 14: PREPARE AN ACCOMMODATION INVESTMENT PROSPECTUS

An investment prospectus will include key tourism figures and opportunities for investment in the accommodation sector. This will be used as a marketing document which can be provided to potential investors.

5.3.7. DINING AND LOCAL PRODUCE

The region has a poor food and produce offering. Considering the agricultural strengths of the region there is minimal availability of local produce. The region would benefit from increased quantity, accessibility and availability of cellar door or local produce experiences. These experiences could be linked to local produce stores or markets in the region.

In addition, considering the region’s coastal attractions and reputation as a fishing destination there is a clear gap in quality seafood dining establishments.

DIRECTION 15: COMMENCE AN AWARENESS PROGRAM FOR LOCAL DINING ESTABLISHMENTS TO SUPPORT FRESH AND LOCAL PRODUCE

A local support program should be established which promotes the use and consumption of regional produce and the use of local product in dining establishments.

DIRECTION 16: UNDERTAKE A LOCAL SEAFOOD GASTRONOMY STRATEGY

This strategy will look at the supply chain and use of local seafood throughout the region. The aim of the strategy will be to develop effective ways of growing seafood gastronomy. This will require engagement with the local seafood industry and there may be further opportunities to leverage marketing of local seafood experiences with Great Ocean Road Tourism.

5.3.8. SIGNAGE

Industry sessions highlighted that tourism signage including directional, gateway, and linkages between attractions was poor throughout the region. This is critical for a touring destination in order to drive dispersal through the region.

DIRECTION 17: UNDERTAKE A SIGNAGE REVIEW AND STRATEGY

A Signage Strategy including, a review of existing signage, establishment of township gateway signage, and engagement with Vic Roads should be undertaken across the Shire. This will focus on removing outdated signage and identifying locations for new directional and tourism signage.

5.3.9. LEVERAGING FROM THE PORT

The Port of Portland and Local Port of Portland Bay are key infrastructure assets for region. Leveraging tourism growth through the port should be considered through supporting:

• Cruise ship visitation;

• Game fishing; and

• Opportunities for commercial whale watching.

Kaikoura in New Zealand provides an example of a town which has been transformed due to attracting international visitors for whale watching and other marine tours. Portland has the potential to become the key destination in Victoria for marine life tours and adventures. Attracting tour operators will be critical to achieve this as well as working with international wholesale markets to package these opportunities.
DIRECTION 18: CONTINUE TO WORK WITH PRIVATE TOUR OPERATORS TO ESTABLISH IN THE PORT FACILITY

5.4. INDUSTRY AND GOVERNANCE

5.4.1. RESOURCE ALLOCATION

Analysis of Council’s tourism budget and resourcing demonstrates some significant constraints for tourism development. Approximately $930,000 is allocated for tourism development in the Shire for the year 2014/2015 with maintaining and operating the three Visitor Information Centres by far the largest expenditure representing 52% of Council’s tourism budget. Key gaps and shortages in resource allocation include:

- Marketing and advertising;
- Digital information and promotion; and
- Industry development and training.

Whilst the information centres play an important role for developing and supporting tourism in the Shire’s towns, the role of the Visitor Information Centres may need to be broadened to include a greater role in marketing, developing digital content and industry development. This may require staff to have a greater and more diverse set of skills. In addition, opportunities for Visitor Information Centres to develop income streams should be investigated.

DIRECTION 19: REVIEW THE ROLE OF VISITOR INFORMATION SERVICES PERSONNEL

5.4.2. STRUCTURES

Since the closure of Discovery Coast Tourism in 2009, there has been lack of Shire wide management and organisation for tourism. As Glenelg Shire is not a full member of GOR Tourism, there is also lack of organisation at the regional level. This has limited the ability of the region to market itself as a destination.

Whilst a new regional tourism organisation may not be necessary, there is a need for each of the LTAs and destination representatives to meet and discuss marketing, business development, training and skills needs in the tourism industry. This group may be formed as an advisory group to Council. It should have a clear term of reference which provides a strategic purpose.
DIRECTION 20: ESTABLISH A TOURISM ADVISORY GROUP
INCLUDING REPRESENTATIVES FROM EACH OF THE SHIRE’S KEY
DESTINATIONS

DIRECTION 21: UNDERTAKE AN ANNUAL TOURISM INDUSTRY AND
RETAIL NETWORKING NIGHT

5.4.3. INDUSTRY MONITORING

There is a lack of understanding and data on the local tourism industry in Glenelg Shire
including visitor dynamics, business performance, and economic contribution to the Shire.
The lack of understanding of the industry inhibits Council’s ability for proper decision-
making and providing industry support. The findings from the research program may be
presented at industry briefings and networking events.

DIRECTION 22: UNDERTAKE ONGOING MONITORING OF THE
INDUSTRY USING PRIMARY AND SECONDARY RESOURCES
INCLUDING MONITOR AND TRA DATA
## 6. **Key Strategic Initiatives**

<table>
<thead>
<tr>
<th>Direction</th>
<th>Actions</th>
<th>Lead Responsibility</th>
<th>Commencement Year</th>
<th>Cost</th>
<th>Funding Sources</th>
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</thead>
<tbody>
<tr>
<td><strong>Destination Marketing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Direction 1: Undertake Brand Development for Glenelg’s Key Destinations</strong></td>
<td>Establish a brand advisory committee</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
<td>$25K</td>
<td>Glenelg Shire Council, Regional Development Victoria (RDV), LTAs, Local BDAs, Key Tourism Product</td>
</tr>
<tr>
<td></td>
<td>Establish a brief for brand development</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Appoint an experienced brand consultant to review and/or re-establish destination based branding drawing on the strengths of each destination/sub-region</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improve alignment of GSC tourism strategic work with the work being undertaken by Great Ocean Road Tourism in brand development for its destinations (see Direction 2)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Direction 2: Glenelg Shire to Work with Surrounding RTOs to Promote Its Destinations to Key External Markets</strong></td>
<td>Continue to promote and advertise Nelson and Surrounds with Limestone Coast</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
<td>$100K per annum</td>
<td>Glenelg Shire Council</td>
</tr>
<tr>
<td></td>
<td>Improve alignment of GSC tourism strategic work with that of Great Ocean Road Regional Tourism and leverage off Great Ocean Road marketing activities (destination marketing)</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Cross pollination of promotion and marketing of Casterton with the Grampians region and Hamilton</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTION</td>
<td>ACTIONS</td>
<td>LEAD RESPONSIBILITY</td>
<td>COMMENCEMENT YEAR</td>
<td>COST</td>
<td>POTENTIAL FUNDING SOURCES</td>
</tr>
<tr>
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<td>DIRECTION 6: RENEW GLENELG SHIRE’S DIGITAL PRESENCE AND CROSS POLLINATE WITH GREAT OCEAN ROAD ONLINE DIGITAL PRESENCE (INCREASED TOUCH-POINTS AND ROUTES OF ENTRY TO GSC TOURISM INFORMATION)</td>
<td>Appoint a specialist digital design consultant to develop a fresh and innovative web based tourism marketing portal. This will incorporate all shire-wide destinations. New portal to cross pollinate with the web based resources of Great Ocean Road Regional Tourism. Establishment of hyperlinks to create new multi-faceted destination focused website link Incorporate existing digital marketing product (YouTube)</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
<td>$75K</td>
<td>Glenelg Shire Council Great Ocean Road Regional Tourism Tourism Victoria</td>
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<td>DIRECTION 7: ESTABLISH AND PROMOTE SOCIAL MEDIA PRESENCE</td>
<td>Establish a social media program, protocols and benchmarks Allow for more dynamic and up-to-date information to be made available to web site audiences through social media (maintains freshness of information) Maximize use of existing social media for tourism marketing (Facebook/Twitter) Cross pollination of links with existing externally managed sites (e.g. I Love Portland, Casterton Kelpie Association, Portland Cable Trams)</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
<td>$10K</td>
<td>Glenelg Shire Council</td>
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<td>DIRECTION 5: UNDERTAKE A BRAND REFRESHMENT/DEVELOPMENT AND MARKETING STRATEGY FOR GREAT SOUTH WEST WALK</td>
<td>Establish a working group comprising GSWW members, Parks Victoria and Glenelg Shire Appoint a consultant to undertake a marketing and brand development strategy to align with any outcomes from the Barwon South West Trails Strategy work Collaborate with GSWW to establish a new high quality website with cross pollination links to all GSC web based tourism marketing touch points</td>
<td>GSWW</td>
<td>Year Two</td>
<td>$50K</td>
<td>Parks Victoria RDV Glenelg Shire GSWW Community Groups</td>
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| **DIRECTION 3: GLENELG SHIRE TO WORK WITH ESTABLISHED TOURING ROUTES AND TOUR COMPANIES TO ENSURE ITS DESTINATIONS ARE PROMOTED TO THE TOURING MARKET** | Participate in the Great Southern Touring Route (GSTR)  
Participate in the Melbourne Adelaide Touring Route (MATR)  
Promote the benefits of Great Southern Touring Route and Melbourne Adelaide Touring Route to local tourism operators  
Alignment to existing strategic marketing work in place to ensure duplication is avoided and consistency of message is delivered | Economic Development and Tourism | Year Two | | Glenelg Shire Council Tourism Operators |
| **DIRECTION 4: ESTABLISH A NEW NATIONAL PARK BRAND IN THE GLENELG SHIRE’S SOUTH WEST TO STRENGTHEN THE APPEAL OF THE NATURE BASED ICONS OF THE AREA** | Establish a Working Group comprising of Parks Victoria, GSWW and Council  
Alignment of GSC branding with Parks Victoria to maximise brand exposure for the cluster of National Parks in South West Victoria | Parks Victoria | Year Two | $50K | Parks Victoria  
Tourism Victoria  
RDV  
Glenelg Shire |
| **DESTINATION DEVELOPMENT** | | | | | |
| **DIRECTION 8: UNDERTAKE A DETAILED STRUCTURE PLAN AND URBAN DESIGN FRAMEWORK FOR PORTLAND CBD** | Seek RDV Funding Assistance  
Establish a brief for a CBD Structure Plan  
Appoint an experienced and qualified consultancy to undertake a CBD Structure Plan with a tourism focus  
Establish a steering committee to oversee the project | Glenelg Shire Council Strategic Planning Unit | Year Two/Three | $180K | RDV |
| **DIRECTION 9: ESTABLISH A REGIME OF PLACE MAKING INITIATIVES FOR PORTLAND** | Investigate potential funding sources to support a place making position for Portland (RDV etc.)  
Undertake discussions with PTA about establishing a dual admin, marketing and place making position | Economic Development and Tourism | Year Three + Ongoing | $90K per annum | Glenelg Shire Council  
PTA  
RDV |
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<td>DIRECTION 10: CONTINUE TO SUPPORT THE GUNDITJIMARA IN ESTABLISHING AN INTERNATIONALLY READY CULTURAL TOURISM ATTRACTION</td>
<td>Continue to work with and support the Gunditjmara in assisting with the long term process of establishing the Budj Bim Heritage Precinct</td>
<td>Economic Development and Tourism</td>
<td>Ongoing (long term process)</td>
<td>N/A</td>
<td>N/A</td>
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<td>DIRECTION 11: ESTABLISH A NOMINATED INLAND TOUR UTILISING SEALED BACKROADS THAT LINK GLENELG’S VILLAGES</td>
<td>Establish a working group comprised of Glenelg’s villages to encourage development of tourism identity and product availability/development.</td>
<td>Economic Development and Tourism</td>
<td>Year Two</td>
<td>$20K</td>
<td>Glenelg Shire Council, Tourism Providers RDV</td>
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<td>DIRECTION 12: ADVOCATE FOR IMPROVEMENTS TO GLENELG RIVER PARKLAND</td>
<td>Advocate for improvements to Glenelg River Parkland.</td>
<td>Glenelg Hopkins Catchment Management Authority</td>
<td>Align timeframes to the GHCMA</td>
<td>$15K</td>
<td>GHCMA, RDV</td>
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<td>DIRECTION 13: INVESTIGATE AND PROMOTE NATURE BASED TOURISM OPPORTUNITIES IN GLENELG SHIRE</td>
<td>Economic Development Unit to work with investors and Council Strategic Planners to remove barriers to investment and promote opportunities through Council media.</td>
<td>Economic Development and Tourism</td>
<td>Year Three But in conjunction with Portland Land Strategy projects</td>
<td>As Required</td>
<td>Glenelg Shire Council</td>
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<td>DIRECTION 14: PREPARE AN ACCOMMODATION INVESTMENT PROSPECTUS</td>
<td>Appoint a consultant to prepare a high quality graphic presentation of accommodation investment opportunities to be promoted to investors. Incorporate economic data from ‘Monitor’ (Direction 23) together with existing economic data from established sources</td>
<td>Economic Development and Tourism</td>
<td>Year Three+</td>
<td>$15K</td>
<td>Glenelg Shire Council, RDV</td>
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| DIRECTION 15: COMMENCE AN AWARENESS PROGRAM FOR LOCAL DINING ESTABLISHMENTS TO SUPPORT FRESH AND LOCAL PRODUCE | Assist with the establishment of a Local Producer Program  
Investigate opportunities to improve local supply chain of dairy, animal proteins and horticulture  
Investigate channels for improved marketing/advertisement of local/seasonal consumption | Economic Development and Tourism             | Year Two & Ongoing | $10K  | Glenelg Shire Council  
Local producers  
Supply chain participants  
Local end user groups |
| DIRECTION 16: UNDERTAKE A SEAFOOD GASTRONOMY STRATEGY                    | Appoint a qualified and experienced consultant to investigate the barriers to seafood usage within the region  
Development of strategies with industry bodies and end users to assist in the removal of barriers and grow local seafood consumption  
Align marketing opportunities with Great Ocean Road Tourism - destination marketing strategies | Economic Development and Tourism/  
Great Ocean Road Tourism | Year Two & Ongoing | $30K  | Glenelg Shire  
Great Ocean Road Tourism  
RDV  
Seafood Industry |
| DIRECTION 17: UNDERTAKE A SIGNAGE REVIEW AND STRATEGY                    | Audit of tourism signage across the Shire  
Prepare a brief for a Signage Strategy  
Appoint a consultant to provide advice on signage improvement | Economic Development and Tourism             | Year Two+          | $50K  | Glenelg Shire Council  
Vic Roads |
| DIRECTION 18: CONTINUE TO WORK WITH PRIVATE TOUR OPERATORS TO ESTABLISH IN THE PORT FACILITY | Promote opportunities for potential tour businesses to locate/use port facilities  
Continue the dialogue with existing tour companies who may be interested in establishing in the Port  
Continue dialogue/promotion with Cruise Ship operators to champion Portland as a ‘Destination of Choice’ | Economic Development and Tourism             | Ongoing            | N/A   | N/A |

DIRECTION 19: REVIEW THE ROLE OF VISITOR INFORMATION SERVICES PERSONNEL
Review the role of current visitor information services staff with the aim to increase the scope of staff roles.  
Ensure all VIC staff have a sound understanding of the Glenelg Shire product offering and cross pollination between centers is maximised

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<td>Internal</td>
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<td>DIRECTION 20: ESTABLISH A TOURISM ADVISORY GROUP INCLUDING REPRESENTATIVES FROM EACH OF THE SHIRE’S KEY DESTINATIONS</td>
<td>Seek expressions of interest from each of the LTAs or Business Development Associations for members to form a Glenelg Tourism Advisory Group. Hold quarterly meetings with advisory group. Use as a marketing tool and a channel to report on progress of GSC tourism strategy and deliverables. Use as a sounding board for strategic ideas and seeking input where required. Clear strategic purpose - NOT to be used as a channel for individual wish lists.</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
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<td>DIRECTION 21: UNDERTAKE AN ANNUAL TOURISM INDUSTRY AND RETAIL NETWORKING NIGHT</td>
<td>Establish a tourism and retail networking night which keeps all of the tourism industry informed about what is occurring in the region. This night will also be used to promote and gain buy in marketing initiatives and showcase Glenelg’s product. Present the Tourism Strategy at the Industry Networking Event</td>
<td>Economic Development and Tourism</td>
<td>Year One</td>
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<td>DIRECTION 22: UNDERTAKE ONGOING MONITORING OF THE INDUSTRY USING PRIMARY AND SECONDARY RESOURCES INCLUDING MONITOR AND TRA DATA</td>
<td>Implement and continue to utilize the Monitor program to track business performance across the Glenelg Shire. Present findings from Monitor at industry briefings and maintain records to support and promote strategic business development and new tourism activities. Establish a program of reporting on other secondary tourism indicators from Tourism Research Australia.</td>
<td>Economic Development and Tourism</td>
<td>Year One &amp; Ongoing</td>
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