

GLENELG TOURISM STRATEGY

2019-2026



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Contents

Introduction.....	1
Policy Context.....	2
Tourism in Glenelg Shire	5
Tourism Assets.....	7
Strengths & Opportunities.....	10
Our Focus Areas.....	12
Brand Development.....	13
Product Development.....	13
Marketing & Promotion.....	14
Customer Engagement.....	14
Indigenous Tourism Products.....	15
Tourism Infrastructure.....	15

Introduction

Located in the beautiful south west of Victoria, Glenelg Shire offers a spectacular array of natural attractions and historic sites. From the rugged coastline and pristine beaches of the Southern Ocean to Indigenous heritage sites and mighty rivers, Glenelg Shire boasts some of Australia's most spectacular locations.

Known as Victoria's birthplace, Portland is steeped in history. The rural city was the first European settlement in Victoria and is home to the oldest known buildings in the state. Further north, Casterton is filled with pioneering history and is well known as the birthplace of the Kelpie, which it celebrates each year during the Australian Kelpie Muster.

The Shire is home to one of Australia's most significant Aboriginal tourist attractions - Budj Bim - the traditional homeland of the Gunditjmarra people. The Budj Bim Cultural Landscape contains one of the world's oldest known aquaculture systems, built some 6,600 years ago. Visitors can experience this ancient culture through tours with local Aboriginal guides.

The Lower Glenelg National Park offers some of the most spectacular scenery in the Shire. With steep gorges and limestone caves, the park is a popular destination for canoeing on the Glenelg River or exploring the Great South West Walk.

Events in Glenelg Shire continue to be a significant driver of tourism. From country racing in Casterton to Portland's Upwelling Festival, our program of major events play a vital role in supporting Council's work to diversify our economic base.

Aims & Objectives

The Glenelg Shire Tourism Strategy has been developed to guide Council's work to support our Shire's tourism industry, improve visitor experiences and address barriers to industry growth.

The strategy identifies the Shire's key tourism assets and outlines opportunities for growth and development of our tourism industry. The six focus areas that are established under the strategy will be supported by a detailed implementation plan.

Policy Context

In 2016-17, total tourism spending in Australia reached \$122.9 billion, an increase of 20 percent since 2013-14. This spending supported 598,200 direct tourism jobs and added \$55.3 billion to the national economy - or 3.2 percent of GDP.¹ On this basis, tourism is now responsible for more than 10 percent of Australia's national export earnings, making it our biggest service export industry.

National

The growth of Australia's tourism industry has occurred under *Tourism 2020*, our national long-term tourism strategy. The strategy was developed in 2009 to provide a framework for growth that addressed ongoing challenges and emerging opportunities in the Australian tourism sector. Tourism ministers from around Australia have identified four priority policy areas under *Tourism 2020*.

These are to:

- Encourage high-quality tourism experiences, including Indigenous tourism;
- Limit the tax, red tape and other regulatory burdens the industry faces;
- Undertake coordinated and effective marketing campaigns to drive demand; and
- Work with industry to support the development of tourism infrastructure that can drive demand.

Tourism 2020 is accompanied by a detailed action plan that identifies the key activities needed under each priority area to help Australia's tourism industry reach its full potential.

¹ Tourism Research Australia, *State of the Industry 2016-17*, February 2018.

Victoria

The Victorian State Government's plans for tourism growth are outlined in its 2016 *Victorian Visitor Economy Strategy*. The strategy recognises the tremendous contribution tourism makes to the state's economy - which it estimates is worth around \$20 billion per annum - and establishes nine priority areas that are critical to the future success of Victoria's tourism sector:

- More private sector investment;
- Build on the potential of regional and rural Victoria;
- Improved branding and marketing;
- Maximise the benefits of events;
- Improved experiences for visitors from Asia;
- Better tourism infrastructure;
- Improved access into and around Victoria;
- A skilled and capable sector; and
- More effective coordination.

The strategy is accompanied by a four-year action plan outlining the key activities planned for each priority area.

Regional

Glenelg Shire is part of the Great Ocean Road region in south west Victoria. In 2016-17, the region hosted more than 5 million visitors, who added \$994 million to the regional economy.

In conjunction with participating councils, industry participants and stakeholders, Great Ocean Road Regional Tourism (GORRT) has developed the *Strategic Master Plan for the Great Ocean Road Region Visitor Economy 2015-2025* to provide leadership and direction to the region's tourism industry. The plan is intended to foster collaboration and unity of purpose amongst tourism industry participants and local government authorities within the region.

The master plan identifies three key strategies aimed at sustainably growing the region's visitor economy:

- Development - Maintaining and developing visitor infrastructure, products and experiences within the region.

- Marketing - Marketing the region, its destinations and experiences to maximise economic yield and dispersal outcomes.
- Management - Managing growth in visitor numbers in a sustainable manner that minimises negative impacts on communities and the environment.

GORRT has also facilitated the development of destination action plans for fourteen towns and tourist destinations within the region. These plans are aimed at growing the number and value of tourist visitations through strategies that respond to the unique attributes and challenges of destinations across the region.

Destination action plans for Portland and Casterton recognise the need to improve marketing and promotion, and to further develop tourism products that reflect the natural beauty and individual identities of these two towns. Actions identified in the plans have been prioritised, which allows for a staged approach to their implementation.



Tourism in Glenelg Shire

Glenelg Shire is home to some of Australia's most spectacular natural landscapes and Indigenous heritage sites.

The Shire's proximity to the Grampians National Park, Coonawarra wine region, South Australia's Limestone Coast and the

Great Ocean Road makes it an ideal location from which to explore some of Australia's most iconic tourist destinations.

Data from Tourism Research Australia shows that, on average, 379,000 tourists visited the Shire annually between 2014 and 2017, adding almost \$90 million in direct spending to the local economy. A summary of key tourism metrics for Glenelg Shire is presented at Table 1.

Table 1 - Glenelg Shire Key Tourism Annual Metrics - 2017.²

	International	Domestic Overnight	Domestic Day	TOTAL
Visitors ('000)	11	154	214	379
Nights ('000)	36	450	-	486
Average stay (nights)	3	3	-	3
Spend (\$m)	3	61	24	88
Average spend per trip (\$)	315	394	110	232
Average spend per night (\$)	91	135	-	132
Average spend (commercial accommodation) per night (\$)	134	141	-	140

² Source: Tourism Research Australia, *Local Government Profile - Glenelg Shire*, 2017. Data is based on a four-year average from 2014 to 2017.

Visitors to Glenelg Shire

There are many reasons visitors travel to Glenelg Shire. Data from Tourism Research Australia shows that domestic day visits for holidays are by far the most common category of visitation, while international tourist holidays represent less than 4.5 percent of visitations.

In relation to accommodation choices, almost a third of overnight visitors to the Shire stay with friends or relatives. The popularity of Glenelg Shire as a destination for nature-based tourism is reflected in the number of visitors saying in commercial camping grounds and caravan parks.

Table 2 presents a breakdown of the reasons visitors come to Glenelg Shire, the type of travel parties they belong to and the popularity of different modes of accommodation. As the dataset is incomplete, it should not be used to measure the number of visitors in each category but offers valuable insights into the relative popularity of travel choices.

Table 2 - Glenelg Shire Visitor Profile - 2017³

Visitors to Glenelg Shire	International	Domestic Overnight	Domestic Day	TOTAL
Reason (visitors '000)				
Holiday	9	69	125	203
Visiting friends or relatives	np	49	np	np
Business	np	np	np	np
Other	np	np	np	np
Travel party type (visitors '000)				
Unaccompanied	4	36	-	40
Couple	4	50	-	54
Family group	np	29	-	np
Friends/relatives travelling together	np	30	-	np
Accommodation (nights '000)				
Hotel or similar	6	97	-	103
Home of friend or relative	np	144	-	np
Commercial camping/caravan park	4	102	-	106
Backpacker	np	np	-	np
Other	8	105	-	113

³ Source: Tourism Research Australia, *Local Government Profile - Glenelg Shire*, 2017. Data is based on a four-year average from 2014 to 2017.

np = the estimate is unreliable and cannot be published.

Tourism Assets

Glenelg Shire offers visitors a wide range of attractions, many of which leverage the region's rich heritage and stunning natural beauty. Our major tourism assets are key drivers of the Shire's tourism industry.

Budj Bim Cultural Landscape

Budj Bim is the site of one of Australia's earliest and largest aquaculture systems. Historical and archaeological evidence shows that the Gunditjmara people were farming eels for food and trade as early as 6,600 years ago.

Budj Bim is located on the Budj Bim lava flow, formed nearly 30,000 years ago when Budj Bim (formerly known as Mount Eccles) erupted. The lava flow blocked pre-existing valleys to form new wetlands and waterways, including nearby Lake Condah.

In 2017, Budj Bim was proposed for inclusion on the UNESCO World Heritage List.

Cape Bridgewater & the Discovery Coast

Cape Bridgewater is home to the largest mainland colony of Australian fur seals, which can be viewed from the clifftops or by boat tours.

The area offers pristine beaches, volcanic lakes, spectacular coastal walks and terrific beach-side amenities. Popular attractions include the 'Petrified Forest' rock formations, the 'Bridgewater Blowholes' and nearby sand dunes. The cliffs above Cape Bridgewater provide a great vantage point for whale watching.

Glenelg River

The lower reaches of the Glenelg River presents visitors with some of the most spectacular scenery in the region. Framed by steep gorges and limestone caves, the river is a popular destination for anglers, nature lovers and adventurers alike.

The 75-kilometre-long stretch between Dartmoor and Nelson offers excellent flat-water canoeing, which is a favourite activity amongst tourists.

Great South West Walk

The Great South West Walk is one of the regions most iconic attractions. The walk is comprised of a 250-kilometre-long loop track that passes through coastal, forest and river landscapes between Portland and Nelson.

The walk is well serviced by campsites equipped with fireplaces, shelters and toilets. Each of the fifteen individual sections of the walk can be completed as day hikes or joined together to form a longer route.

Princess Margaret Rose Cave

Approximately 15 minutes from Nelson, Princess Margaret Rose Cave is one of Australia's most decorative limestone caves. Visitors to the cave can see stalactites and stalagmites, helictites, cave coral and many other beautiful rock formations.

The cave is located in the Lower Glenelg National Park, which offers camping sites with good amenities or huts equipped with kitchens and bunks.

Australian Kelpie Centre & Kelpie Muster

Opened in 2018 in Casterton - the birthplace of the Kelpie - the Australian Kelpie Centre celebrates the quintessential Australian working dog. The centre, which is located in the heart of the Kelpie Trail, includes a Visitor Information Centre and an interpretive display showcasing the history of Kelpie.

Each year, the Australian Kelpie Muster and Kelpie Festival draws thousands of visitors to Casterton to celebrate all things Kelpie. This iconic event includes a street parade, the Kelpie Auction, and the famous Stockman's Challenge.

Festivals & Major Events

Glenelg Shire hosts an impressive calendar of festivals and major events. From country racing at Casterton and the Casterton Show to Wood Wine and Roses, Hooked on Portland and the Upwelling Festival, the Shire's major events are a significant driver of tourist visitations.

Forests & Parks

Vast areas of Glenelg Shire are of such environmental significance that they are reserved for conservation purposes and compatible recreational uses. These areas include nine National, State and Coastal parks reserved under the National Parks Act, as well as numerous forest reservations and wildlife reserves.

Collectively, these forests and parks receive up to 500,000 visits annually.⁴

While most of these visitors are from within the local and regional catchment, the more developed tourist-orientated areas - such as Cape Bridgewater, Cape Nelson and Princess Margaret Rose Cave - are favourite destinations for interstate and overseas visitors.

Heritage Sites

Glenelg Shire is rich in heritage sites that tell the story of thousands of years of Aboriginal culture and early European settlement.

Significant Indigenous heritage sites - such as Budj Bim, Lake Condah and Tyrendarra - present important opportunities for visitors to learn about local Aboriginal history while guests on Gunditjmara country.

The Shire's largest population centre - Portland - was the first European settlement in Victoria. Popular attractions include the Portland Cable Tram, Maritime Discovery Centre, Cape Nelson Lighthouse, Powerhouse Vintage Car Museum and the Portland History Trail.

Many historical buildings and places of interest for their heritage value can be found in Casterton, Heywood, and the smaller townships of Dartmoor, Narrawong, Digby and Merino, the latter of which was the first inland pastoral settlement in the state.

Marine Activities

Glenelg Shire's southern boundary is formed by the coastline facing the Southern Ocean. From rugged clifftops and sandy beaches to estuaries and the Portland Foreshore, the Shire's ocean aspect is a

tremendous tourism asset. Favourite marine activities include whale watching, boating, seal tours and fishing.

Known as Australia's Southern Bluefin Tuna capital, Portland comes alive each April as recreational fishers from around the country come to compete in the annual 'Hooked on Tuna' fishing competition.

⁴ Parks Victoria, *Ngootyoong Gunditj Ngootyoong Mara - South West Management Plan, 2015.*

Strengths & Opportunities

Glenelg Shire's location, competitive advantages and an incredible variety of tourism assets combine to create significant opportunities to grow our tourism industry.

The following strengths and opportunities will be advanced within the focus areas established under the Glenelg Shire Tourism Strategy.

Nature-based Tourism

Nature-based tourism is a key strength of Glenelg Shire. The region is rich in nature-based tourism assets that are amongst the best Australia has to offer.

There is a significant opportunity to grow this market segment by improving the way these assets are activated. This should include interpretation of the cultural and natural value of sites around the Shire; further developing tour offerings and activities; supporting eco-based accommodation and associated amenities; improving tracks and trail infrastructure; and better branding and promotion.

Indigenous Tourism Products

The Gunditjmarra, Bunganditj and Jardwadjali people have called the land we know as Glenelg Shire home for tens of thousands of years. Before European settlement in the early 1800's, the Indigenous people of the Shire formed complex societies with strong connections to the land and each other.

Traditional stories and oral histories show the Gunditjmarra Aboriginal population in western Victoria were present when Budj Bim to the south of the Shire erupted almost 30,000 years ago. As one of the world's oldest civilisations, there is strong and growing interest both nationally and internationally in Aboriginal culture and history.

With some of Australia's most significant Indigenous heritage sites located in Glenelg Shire, this thirst for knowledge and authentic experiences presents a good opportunity to grow visitations in conjunction with our local Aboriginal partners.

The Visitor Experience

Many tourism assets in Glenelg Shire are nature-based or founded on the history of the region. Further investment in the visitor experience at these iconic destinations is needed to improve their marketability and grow visitations.

From elevated viewing platforms and interpretive signage to high-quality displays and visitor amenities, the appeal of nature-based and historical destinations can be significantly enhanced by the addition of infrastructure and activations that are sympathetic to the environment.

Marketing & Promotion

Previously, work to promote tourist interest in Glenelg Shire has taken a place-based approach that has not capitalised on cross-promotional opportunities. It is considered that the development of a more integrated approach to the promotion of tourism in Glenelg Shire would be more efficient and effective.

Council will explore the development of consistent branding and uniform promotional material for use by Council,

industry operators and stakeholders across media channels, in signage and at tourist destinations.

Cruise Ships

Portland's naturally deep-water port brings cruise ships to Glenelg Shire through the summer cruising season. While the number and frequency of ships varies from year to year, their arrival in Portland presents a tremendous opportunity for local tourism and hospitality businesses.

To date, the on-shore offerings for cruise ship passengers have taken many visitors to destinations outside of Glenelg Shire, such as the Great Ocean Road, Coonawarra Wine Region and the Grampians National Park. These activities are of limited benefit to the Shire's tourism industry.

There is a significant opportunity to develop high-quality shore-based activities that leverage Glenelg Shire's tourism assets to appeal to cruise ship passengers. As cruise ships are typically docked in Portland for less than ten hours, half-day guided nature-based activities in close proximity to the port are likely to be popular.

Our Focus Areas

The following focus areas have been developed to guide the work of Council in supporting our tourism industry and grow visitations across the Shire.

- Brand Development
- Product Identification & Development
- Marketing & Promotion
- Customer Engagement
- Indigenous Tourism Products
- Tourism Infrastructure

Actions within each focus area will leverage our Shire's tourism assets and capitalise on the strengths and opportunities of our tourism sector.

A detailed implementation plan will be developed to support the delivery of these actions under the Glenelg Shire Tourism Strategy.

Brand Development

A good brand strategy communicates a region's 'personality' and characteristics in a way that is relevant and meaningful to the target audience. The development of effective branding will be critical to the promotion of tourism in Glenelg Shire.

Council will explore opportunities to develop consistent branding to promote tourist destinations and activities in Glenelg Shire. This branding should reflect the unique characteristics and appeal of each destination or activity, while being clearly identifiable as belonging to the Shire.

Product Development

Glenelg Shire offers a tremendous variety of tourism products. However, further work is needed to identify where these products need improvement, or where new products should be developed to fill market gaps.

Council will work to identify where enhancements to our tourism offering or market gaps present opportunities for growth or new products. Council will also work to ensure its current approach to major events and cruise ship visitations is delivering best value for Glenelg Shire.

Marketing & Promotion

Council is committed to continuing its work to promote Glenelg Shire through regional partnerships, collaborations with tourism industry participants and across media channels.

To help ensure this work delivers value for our community, Council will explore opportunities to better align marketing activities across media channels - including social media and online - and adopt more effective communication streams that engage target audiences.

Customer Engagement

Excellence in customer engagement is vital to the success of local tourism industries. For tourists, ready access to helpful information and a friendly reception can greatly influence perceptions of a destination.

Council will explore opportunities to improve the quality and accessibility of our visitor information services to ensure the needs of consumers are being met.

Indigenous Tourism Products

Indigenous tourism is recognised as one of Glenelg Shire's emerging strengths. Increasing global and national interest in Aboriginal history and culture presents a tremendous opportunity to grow our tourism industry.

Council will continue to support the Gunditjmarra Aboriginal people in their work to preserve and promote the Budj Bim Cultural Landscape and to share the history and significance of their ancestral lands with visitors to the Shire. Council will also explore opportunities to promote the importance of Indigenous tourism products through our regional partnerships.

Tourism Infrastructure

Providing the high-quality infrastructure needed to support tourism is a key role for government. The provision of appropriate infrastructure at many of the Shire's nature-based tourist attractions requires careful planning that is sympathetic to our environment.

Council will identify opportunities to improve infrastructure to support tourism and tourist activities across Glenelg Shire. Private-sector partnerships and government funding support will be actively pursued.

