



# 12 APOSTLES COAST & HINTERLAND

DESTINATION ACTION PLAN 2020 - 2023

November 2019



Australian Government

**BUILDING OUR FUTURE**



GREAT OCEAN ROAD  
REGIONAL TOURISM LIMITED





# ACKNOWLEDGEMENTS

The development of the 12 Apostles Coast and Hinterland Destination Action Plan has been facilitated by Great Ocean Road Regional Tourism Ltd. The process brought together representatives from all stakeholder groups that benefit from the visitor economy; local government, state government agencies, industry and the community to develop a plan.

Specifically we would like to thank the individuals that participated in the plan development process:

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## **Destination Action Plan Leadership Group**

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Cr Neil Trotter – South West Ward, Corangamite Shire

Images courtesy of Great Ocean Road Regional Tourism.



# INTRODUCTION

This Destination Action Plan for 12 Apostles Coast & Hinterland identifies priority strategies and actions for the area including the towns of Port Campbell, Peterborough, Princeton, Moonlight Head, Simpson, Cooriemungle, Timboon and Cobden along with the Port Campbell National Park and Bay of Islands Coastal Park.

If implemented over the next three to five years, the actions will enhance the visitor economy competitiveness of 12 Apostles Coast and Hinterland within the Great Ocean Road region. These strategic actions will also be reflected in the Master Plan for the Visitor Economy for the region to facilitate regional collaboration and cooperation.

The 12 Apostles Coast and Hinterland Destination Action Plan has been prepared by a facilitated workshop process involving business and community representatives who considered and reached consensus on tourism development, marketing and management opportunities along with addressing the challenges. The group has identified and agreed upon the key priorities and actions that will make a positive difference to the growth and sustainability of the 12 Apostles Coast and Hinterland visitor economy and experience.



# THE VISITOR ECONOMY

The visitor economy of the Great Ocean Road region has experienced year on year growth of visitor numbers for decades and is now Victoria's most visited region, specifically by international visitors. However, while the region has high demand and forecasts indicate that this growth will continue, the region lacks supply of accommodation and infrastructure to meet and manage demand.

The 12 Apostles is an Australian tourism destination icon and the site currently attracts 2.8m visitors each year, forecast to grow to 4m by 2026. The 12 Apostles are Australia's most visited natural attraction. Day trip visitation results in low yield to the local community relative to the overall scale of visitation. Capitalising on the volume of day trips and growing longer stays is a priority challenge and opportunity.

This regional and local demand/supply gap was recognised by the Strategic Master Plan for the Great Ocean Road Region Visitor Economy 2015-25 as requiring \$1b public and private investment. Since 2015 a pipeline of such investment exceeding \$1.5b as well as governance reform via the State Governments Great Ocean Road Action Plan offers the prospect of transforming the region beyond 2025, allowing for planning approvals and implementation.

Of this pipeline the implementation of the 12 Apostles Precinct Master Plan will be a major game changer.

This Plan covers the period up to the transformation and identifies strategic priorities and actions to address challenges and opportunities, guided by the following objectives (see page 7).

To implement this Plan will require collaboration at local, region, state and federal levels. However, local leadership and engagement will be a pivotal success factor and therefore this Action Plan provides the guiding direction and focus for the next 3-5 years.







# THE VISITOR ECONOMY

Visitation to the Great Ocean Road  
year ending June 2019

## TOTAL VISITATION

VISITORS



7.4m\*

VISITOR  
NIGHTS



8.0m

VISITOR  
EXPENDITURE



\$1.5b

DAY TRIP  
VISITORS



4.5m

\* Includes International Day Trips

## DOMESTIC VISITATION

### OVERNIGHT TRAVEL

VISITORS



2.6m

VISITOR  
NIGHTS



7.0m

TOURISM  
CONSUMPTION



\$987m

### DAYTRIP TRAVEL

DAY  
TRIPS



3.7m

TOURISM  
CONSUMPTION



\$362m

## INTERNATIONAL VISITATION

### OVERNIGHT TRAVEL

VISITORS



251.4k

VISITOR  
NIGHTS



976.6k

### DAYTRIP TRAVEL

DAY  
TRIPS



785k

TOURISM  
CONSUMPTION



\$109m

Source: National Visitor Survey & International Visitor Survey, YE June 2019, TRA.





# EXECUTIVE SUMMARY

This Destination Action Plan for 12 Apostles Coast and Hinterland sets out the priorities for the destination over the next three to five years.

## 1. INVESTMENT IN INFRASTRUCTURE

Participate in and support collaborative advocacy.

## 2. PRODUCT DEVELOPMENT

Enhance product offering with focus on growth and diversity in food and experience products and the creation of new nature-based products and experiences.

## 3. WORKFORCE DEVELOPMENT

Increasing skilled workforce and housing availability and affordability to attract a diverse range of residents who want to live, work and do business here.

## 4. COMMUNICATE VISION 'TO BE A WORLD CLASS SUSTAINABLE DESTINATION'

Create a 10-year plan to be a leader in sustainable tourism within the region and nationally – the most sustainable nature-based tourism destination in Australia.

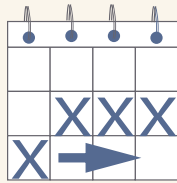
## 5. VISITOR EXPERIENCE ENHANCEMENT

Development of innovative ways for visitors to access interpretive information and stories about the destination attributes and experiences.

## 6. PROMOTE THE VALUE OF THE VISITOR ECONOMY

Educating communities on the value of the visitor economy and engaging industry in the value of working collaboratively to enhance visitor experience.

# OBJECTIVES



Increase visitor length of stay



Increase visitor satisfaction



Increase dispersal — geographical, seasonal and mid-week visitation



Increase visitor expenditure



Increase Industry & community engagement

## Visitor economy Objectives for the Great Ocean Road Region are:

1. To increase visitor length of stay
2. To increase visitor expenditure
3. To increase visitor dispersal (geographically, seasonally and weekday/ time based)
4. To increase visitor satisfaction
5. To increase industry and community engagement, participation and support.

## Destination Objectives for 12 Apostles Coast and Hinterland

Specific Destination objectives for the 12 Apostles Coast and Hinterland are consistent with and pivotal to the above regional objectives. Increasing length of stay at the iconic 12 Apostles will have positive flow on impacts to the region.

Since the previous Destination Action Plan and the Strategic Master Plan for the Region, collaborative advocacy efforts have resulted in Federal and State Government funding commitments and the pipeline of prospective private development projects, as mentioned above, this offers the prospect of transforming the visitor experience of the Destination within the next five years towards the achievement of these objectives.

This Action Plan therefore focusses on practical and achievable actions to prepare the destination for this transformation.



# OUR VISION

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

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

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

Visitors love the authentic connection to local communities and the land and enjoy the high-quality cuisine sourced from local produce.

Visitor servicing here is at the forefront of modern technology and have multiple travel modes available to access the region, high standards of roads and way finding expand the opportunities to connect with the culture and stories of the landscape.

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





# OUR VALUES





# STRENGTHS

1. Passionate industry participants provide a growing range of quality and value products, experiences and visitor services.
2. Strong support from Corangamite Shire and Great Ocean Road Regional Tourism provides opportunities for development and collaborative initiatives.
3. Home to iconic Australian natural assets with national and international brand value.
4. High visitation to key sites exceeds national and global comparative site visitation benchmarks.
5. Potential to activate other high-quality natural sites and to connect with hinterland value adding to visitor experiences.







# CHALLENGES

## Lack of investment in infrastructure

- Enabling infrastructure for future needs – power, water, sewerage, roads
- Public amenity and facilities
- Poor experience/interpretation of natural icons
- Private developments – accommodation
- Implementation of the 12 Apostles Precinct Master Plan and Shipwreck Coast Master Plan
- Visitor management at primary attraction sites

## Workforce and skills shortages

- Lack of working population to fill job vacancies (amplified by industry stigma and accommodation/housing availability & affordability)
- Lack of skilled workers affecting visitor experience through complacency, poor service or limited opening hours

## Lack of product and experiences

- Experience based product
- Sellable, packageable products (complete reliance on nature-based attractions)
- Range of product and accessibility (e.g. food offering & opening hours)
- Events and entertainment
- Hinterland product and experiences

## Transport

- Reliance on self-drive experiences
- Dependence on day-trip bus tours
- Inadequate public transport services

## Community and Industry engagement

- General community lack of understanding of benefits of tourism and resistance to growth/development
- Industry engagement – limited cooperation

## Geological risks

- Safety concerns
- Attractions at risk – i.e. Apostles and Gibson Steps
- Expand promotion to other Shipwreck Coast attractions e.g. Bay of Islands and London Bridge

## Reputational brand damage – balancing advocacy





# OPPORTUNITIES

## Engaging and educating communities on the value of the visitor economy

### Develop a reputation as a hero sustainable visitor destination

- Aim to be Australia's most sustainable tourism destination (environmental, economic, social and cultural)
- Communicate this Plan to all stakeholders
- Low impact experiences – on foot, by bicycle and by public transport
- Business resilience and crisis planning

### Visitor education

- Better story-telling and interpretive information,
- Provide opportunities to learn about environment, geology, cultural stories
- Touring resources (an app or leverage with Alpaca Maps) to increase geographic dispersal

### Product development

- New nature-based experiences
- Quantity, quality and range of accommodation
- Dining, retail, seafood product, makers/arts
- Fostering new entrepreneurs
- Hinterland product offering – encouraging growth in artisan produce, 12 Apostles Trail supporting product
- Diversity in cuisine, experiences and activities
- Quality events celebrating the region
- Collaborative product and packaging – create new products from existing
- Potential to re-route Great Ocean Road to coastline between Peterborough and Warrnambool

### Workforce planning

- Increase working population
- Increase diversity of population including youth retention and migration
- Purpose built housing development in Simpson
- Skills training pathways
- Enhance liveability to encourage population growth

# DIAGNOSTIC RATING

Industry research has established that the following factors are present in successful destinations that are achieving the above objectives. The workshop participants considered these factors relative to 12 Apostles Coast and Hinterland in reaching consensus on the priority strategies and actions.

A focus on continuous improvement of all these factors will contribute to the competitive growth and sustainability of the visitor economy of 12 Apostles Coast and Hinterland.

## SUCCESS FACTORS

CHARACTERISTICS	RATINGS 2015 & 2016	RATING 2019	CHANGE
1. Strong local organisations focused on their core role of visitor servicing	5.3 > 7.0	7.2	>
2. Strong regional organisations focused on their core role of regional marketing and development	5.0 > 7.0	7.8	>
3. Local Government support	5.9 > 7.5	8.0	>
4. Strong, consistent and effective leadership by individuals or organisations	5.4 > 7.0	7.5	>
5. Strategic planning for the region with economic, social, environmental and cultural objectives supported by local destination plans	6.1 > 7.7	Maintain – in progress	–
6. Consistent visitor service excellence	4.7 > 5.7	3.1	<<
7. Research driven cooperative marketing	4.6 > 6.2	6.0	<
8. A breadth and depth of tourism infrastructure, experiences and events matched to market demand	4.1 > 5.2	3.6	<
9. Risk management plans in place	3.3 > 7.9	4.2	<
10. Supportive communities which understand the value of tourism.	3.9 > 4.5	3.7	<

The continued positive growth of success indicators 1-4 provides a solid foundation to address the decline of success factors 6-10. Building on these strengths and addressing the challenges guides this Action Plan.







# ACTION PLAN IMPLEMENTATION

The following Action Plan outlines priorities and actions as a guide for stakeholders to collaboratively and cooperatively implement the Plan. To facilitate this, an Implementation Leadership Group of representatives will be formed. While the Plan identifies primary organisational responsibilities and, in many cases joint responsibility, it is reasonable to expect that the Implementation Leadership Group will consider and review this progressively. One key consideration will be the availability and securing of resources to progress the implementation of the Plan in a timely manner. It may also be appropriate and necessary to involve other organisations and to seek funding for specific projects.

The Plan does not commit any organisation to the actions proposed but is a guide to pursuing priorities and actions which will make a positive difference to the achievement of the tourism objectives noted above.

The priority actions have been assigned a key performance indicator priority rating as a guide. These ratings are:

**HIGH** within the first year

**MEDIUM** within one to two years

**LOW** within three years

Progress review of implementation of the Plan will be undertaken annually by GORRT in consultation with the Implementation Leadership Group. This may result in a revision and updating of the Plan. Regardless, a new plan will be prepared in three years time.





## PRIORITY 1

### INVESTMENT IN INFRASTRUCTURE – PARTICIPATE IN AND SUPPORT COLLABORATIVE ADVOCACY

ACTIONS	RESPONSIBILITIES	PRIORITIES
1.1 Implementation of the 12 Apostles Master Plan and Shipwreck Coast Master Plan.	GORRT leadership	High – ongoing
1.2 Enabling infrastructure – maintenance and resilience <ul style="list-style-type: none"> <li>▪ Energy sourcing and supply (security)</li> <li>▪ Roads and transport (see 1.4)</li> <li>▪ Emergency and Health services</li> <li>▪ Recycling and waste disposal (including sewerage)</li> <li>▪ Pre-emptive planning</li> </ul>	Corangamite Shire	High – ongoing
1.3 Technology and communication <ul style="list-style-type: none"> <li>▪ Connectivity</li> <li>▪ Enabling new visitor servicing</li> </ul>	GORRT leadership Corangamite Shire	High – ongoing
1.4 Public transport and roads – maintenance and improvement <ul style="list-style-type: none"> <li>▪ Accessibility – increased accessibility by public transport (more frequency and more options)</li> <li>▪ Road safety</li> <li>▪ Maintenance and improvement of roads – with consideration of changing travel behaviour</li> </ul>	GORRT leadership Corangamite Shire	High – ongoing





## PRIORITY 1 cont.

### ACTIONS

#### 1.5 Trails and lookouts – support projects to improve and enhance existing

- Shipwreck Coast Master Plan – trails and lookouts beyond Port Campbell National Park and Bay of Islands Coastal Park
- 12 Apostles Precinct
- 12 Apostles Trail and upgrade/maintenance of Camperdown to Timboon Rail Trail

GORRT leadership  
Corangamite Shire

#### 1.6 Accommodation for staff

- Affordable housing or purpose-built worker accommodation initiatives (invest/build/rent/buy)
- Support and engage with the GORRT Workforce planning project

GORRT leadership  
Corangamite Shire

#### 1.7 Wayfinding and information signing

- Support World Class signage strategy

GORRT leadership

### PRIORITIES





## PRIORITY 2

### PRODUCT DEVELOPMENT

Enhance product offering with focus on growth and diversity in food and experience products and the creation of new nature-based products and experiences.

ACTIONS	RESPONSIBILITIES	PRIORITIES
<b>2.1 New nature-based experiences</b> <ul style="list-style-type: none"> <li>Active Adventure: walking and cycling experiences</li> <li>Unique and awe-inspiring nature-based products (accommodation, wildlife encounters)</li> <li>Geothermal – Hot springs</li> </ul>	GORRT leadership Corangamite Shire & TATBG	Medium
<b>2.2 Foster new entrepreneurs and encourage innovation</b> <ul style="list-style-type: none"> <li>New business mentoring and support networks</li> <li>Start up grants</li> <li>'Ideas' prospectus/forums</li> </ul>	Corangamite Shire, GORRT, TATBG	High
<b>2.3 Quantity, quality and range of accommodation</b> <ul style="list-style-type: none"> <li>Support private development that aligns with sustainability values</li> <li>Reduce barriers to regulatory framework and promote business diversification. Welcome new business operators to communities</li> </ul>	Corangamite Shire, GORRT, TATBG	High





## PRIORITY 2 cont.

### ACTIONS

#### 2.4 Enhance dining, retail, makers/arts product offering

- Diversity in cuisine, experiences and activities
- Strive for consistent opening hours – 7 days and evenings

#### 2.5 Hinterland product offering

- Encouraging growth in artisan produce and farm gates
- 12 Apostles Trail supporting product
- Grow product in Cobden and Simpson – consider Dairy Interpretation centre

#### 2.6 Grow events

- Support and attract quality events that celebrate the region and meet visitor expectations during low visitation periods

#### 2.7 Create new product by collaboration and packaging

- Create new products by collaboration of existing
- Promote buy in to Great Southern Touring Route and other Inbound Travel Agents programs

### RESPONSIBILITIES

### PRIORITIES

Corangamite Shire, GORRT, TATBG

Medium

Corangamite Shire, GORRT, TATBG, 12 As Artisans

Medium

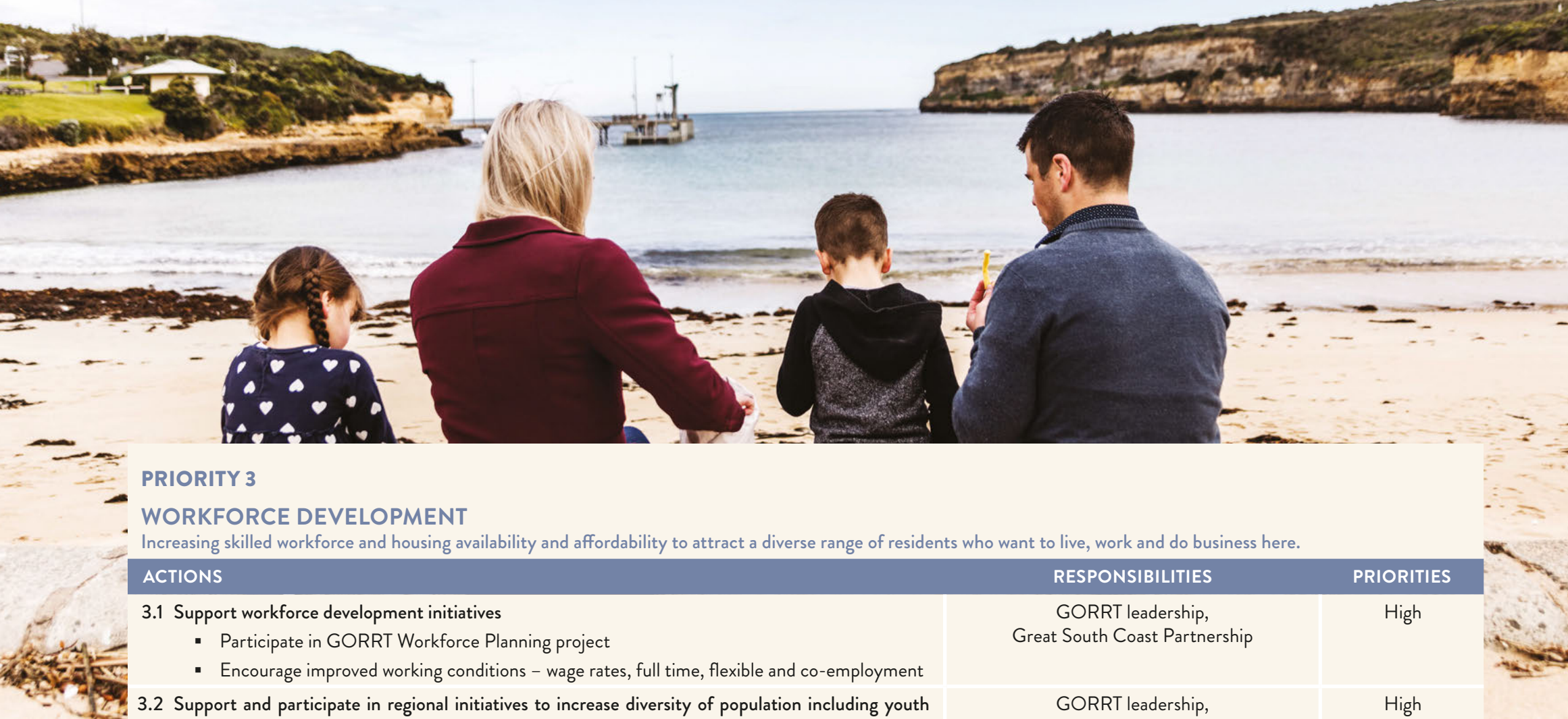
Corangamite Shire, GORRT, TATBG

Medium

Corangamite Shire, GORRT, TATBG

High





### PRIORITY 3

#### WORKFORCE DEVELOPMENT

Increasing skilled workforce and housing availability and affordability to attract a diverse range of residents who want to live, work and do business here.

ACTIONS	RESPONSIBILITIES	PRIORITIES
<b>3.1 Support workforce development initiatives</b> <ul style="list-style-type: none"> <li>Participate in GORRT Workforce Planning project</li> <li>Encourage improved working conditions – wage rates, full time, flexible and co-employment</li> </ul>	GORRT leadership, Great South Coast Partnership	High
<b>3.2 Support and participate in regional initiatives to increase diversity of population including youth retention, return and migration</b>	GORRT leadership, Great South Coast Partnership, Corangamite Shire	High
<b>3.3 Worker housing development in Simpson</b> <ul style="list-style-type: none"> <li>Explore opportunities to create purpose-built worker accommodation solution</li> </ul>	Corangamite Shire	High
<b>3.4 Skills training pathways (Refer 6.2)</b>	GORRT leadership Great South Coast Partnership, Corangamite Shire, Private investors, RTOs	High
<b>3.5 Enhance liveability</b> <ul style="list-style-type: none"> <li>Better community amenity</li> <li>Better managed visitor sites to reduce impact on local communities</li> </ul>	Corangamite Shire	High



## PRIORITY 4

### COMMUNICATE VISION 'TO BE A WORLD CLASS SUSTAINABLE DESTINATION'

Create a 10-year plan to be a leader in sustainable tourism within the region and nationally – the most sustainable nature-based tourism destination in Australia.

ACTIONS	RESPONSIBILITIES	PRIORITIES
<b>4.1 Environmental sustainability</b> <ul style="list-style-type: none"><li>▪ Reduce environmental impact of tourism</li><li>▪ Reduce packaging and ban plastic bags, straws, cups</li><li>▪ Low impact development</li><li>▪ Promote conscious behaviour at key natural attractions</li><li>▪ Celebrate nature-based tourism experiences</li></ul>	GORRT leadership, Corangamite Shire TATBG & community groups, Parks Vic	High – ongoing
<b>4.2 Social Sustainability</b> <ul style="list-style-type: none"><li>▪ Reduce impact of tourism on communities</li><li>▪ Recognising community values, access (e.g. fishing &amp; surfing)</li></ul>	GORRT leadership, Corangamite Shire TATBG & community groups, Parks Vic	High – ongoing
<b>4.3 Cultural Sustainability</b> <ul style="list-style-type: none"><li>▪ Cultural interpretation – indigenous stories</li><li>▪ Support Great Ocean Road Aboriginal Product Development Strategy implementation</li></ul>	GORRT leadership, Corangamite Shire TATBG & community groups, Parks Vic	High – ongoing
<b>4.4 Economic Sustainability</b> <ul style="list-style-type: none"><li>▪ Promote business resilience – training</li><li>▪ Crisis management and preparedness – business and community</li><li>▪ Promote seasonal dispersal – support off-peak marketing initiatives and year-round product development</li></ul>	GORRT leadership, Corangamite Shire TATBG & community groups, Parks Vic	High – ongoing
<b>4.5 Communication</b> <ul style="list-style-type: none"><li>▪ Engage with the industry and community to develop and implement a community and visitor communication plan</li><li>▪ Continue the TATBG communication program</li></ul>	GORRT leadership, Corangamite Shire TATBG & community groups, Parks Vic	High – ongoing





## PRIORITY 5

### VISITOR EXPERIENCE ENHANCEMENT

Visitors will access interpretive information and stories about the destination attributes and experiences in innovative ways.

ACTIONS	RESPONSIBILITIES	PRIORITIES
<b>5.1 Encourage and promote Better Story-telling and interpretive information</b> <ul style="list-style-type: none"> <li>Utilise digital technology to tell stories</li> <li>Interpretive signage at key locations</li> <li>Roving ambassadors – act on and integrate new GOR visitor servicing model</li> </ul>	GORRT, Corangamite Shire, TATBG, Parks Victoria	High
<b>5.2 Provide opportunities to learn about environment, geology, cultural stories</b>	GORRT, Corangamite Shire, TATBG, Parks Victoria	High
<b>5.3 Create and grow Visitor touring resources</b> <ul style="list-style-type: none"> <li>Promote the hinterland touring experience opportunities</li> <li>Create tools to encourage geographic dispersal (touring app or leverage from Alpaca Maps)</li> <li>Participate in Great Ocean Road World Class Signage project implementation</li> </ul>	GORRT, Corangamite Shire, TATBG, TEVE	High





## PRIORITY 6

### PROMOTE THE VALUE OF THE VISITOR ECONOMY

Educating communities on the value of the visitor economy and engaging industry in the value of working collaboratively to enhance visitor experience.

ACTIONS	RESPONSIBILITIES	PRIORITIES
<b>6.1 Engage with and promote the value of tourism to the community</b> <ul style="list-style-type: none"><li>▪ Communicate good news stories from the industry to the wider community</li><li>▪ Communicate the value of tourism to the economy with local focus examples as well as the region</li><li>▪ Communicate progress occurring in public planning and infrastructure projects (Great Ocean Road Parks and Marine Authority, Shipwreck Coast Masterplan, 12 Apostles Trail) and with implementation the reduced impact of visitation on local communities</li><li>▪ Communicate community benefits of proposed developments, including collaboration with project developers</li><li>▪ Engage on community social media</li><li>▪ Invite community organisations and people to industry networking events</li></ul>	GORRT, Corangamite Shire, TATBG	High
<b>6.2 Provide industry development opportunities to enhance visitor experience in region</b> <ul style="list-style-type: none"><li>▪ Provide industry development opportunities for operators to enhance skills in marketing, innovation and business growth</li><li>▪ Create training pathways and work with training organisations to create a better skilled workforce</li><li>▪ Develop training program to enhance visitor servicing with aim to create consistency across region including customer service training</li></ul>	GORRT, Corangamite Shire, TATBG	High
<b>6.3 Co-operative marketing</b> <ul style="list-style-type: none"><li>▪ Develop marketing activity that supports the brand development</li><li>▪ Encourage operators to utilise and integrate the brand narrative and tools</li><li>▪ Encourage buy in to GORRT marketing program</li></ul>	GORRT, Corangamite Shire, TATBG	High



# THE GREAT OCEAN ROAD VISITOR ECONOMY LANDSCAPE

