Ministerial Foreword

Last year I was delighted to release the product audit gap report, the Great Ocean Road World Class Tourism Investment Study with The Hon. Martin Ferguson, the Commonwealth Minister for Tourism.

The study is included in this Destination Management Plan ('The Plan'), along with a number of other key tourism reports and audits – which are significant for the Great Ocean Road and the whole Victorian tourism industry.

I commend the Commonwealth Government for its commitment to this Plan, through funding provided by Regional Development Australia and its endorsement of the Great Ocean Road World Class Tourism Investment Study, which outlines potential tourism priority infrastructure projects to assist in meeting long term visitor needs.

With this year marking the 80th Anniversary of the Great Ocean Road, it is only fitting that we turn our attention to this leading tourism destination and reflect on its unique history and outstanding natural environment, as well as its enormous investment potential.

Our competitiveness hinges on investment. New tourism infrastructure, attractions and accommodation will ensure the Great Ocean Road remains a compelling destination.

The Plan identifies the actions and investment necessary to further develop tourism opportunities in the region for both international and domestic markets in line with forecast visitor growth identified in the national tourism strategy Tourism 2020.

The Great Ocean Road and Victoria is poised to take advantage of some of the exciting opportunities being created, particularly through the powerhouse China market, our fastest growing and highest international spending market – worth $892 million in Victoria last year alone.

I wish to recognise the many partners involved in developing the Plan, which was jointly funded by the industry, the Commonwealth and the Victorian State Government. The Plan identifies the Great Ocean Road's natural competitive advantages and those ‘game changer’ projects that will be required to realise the tourism sector's full potential.

The Victorian State Government will continue to work with industry and the Commonwealth Government to support the implementation of the Destination Management Plan.
Great Ocean Road
Tourism Opportunities

GREAT OCEAN ROAD TOURISM | FEBRUARY 2012
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PART A
BACKGROUND

Presents study background and provides an overview of visitor markets and demand for tourism opportunities in the Great Ocean Road Region.
1. **THE GREAT OCEAN ROAD REGION**

1.1. **DIVERSE AND ACCESSIBLE REGION**

The Great Ocean Road Region is one of Australia’s iconic tourism destinations. The area’s natural beauty has resulted in it becoming an important tourism destination, attracting the largest share of visitors in Victoria.

The Great Ocean Road Region is highlighted in the map below.

The Great Ocean Road Region has its primary strength in nature based tourism. Nature based tourism is available at a number of nodes in the region, including the Great Otway National Park and Otway Forest, Port Campbell National Park and Cape Bridgewater/Lower Glenelg National Park. Water based tourism is a consistent theme throughout the Great Ocean Road region.

Secondary strengths include food and wine, wildlife, history and heritage and events. Emerging product includes indigenous and wellness tourism.

The Great Ocean Road Region is one of the largest tourism regions in Victoria; it is located in Victoria’s south west and includes the core tourism experiences centred around The Great Ocean Road, Geelong Waterfront, Port Phillip Bay, the Bellarine Peninsula, The Otways, 12 Apostles, Shipwreck Coast and Cape Bridgewater to name a few.
1.2. NUMBER ONE VICTORIAN DESTINATION

GREAT OCEAN ROAD REGION IN 2010

Tourism in the Great Ocean Road Region captures around 7 million visitors, contributes over 7000 jobs and has a direct economic output of $1.1 Billion per annum.

TABLE 1 GREAT OCEAN ROAD REGION HIGHLIGHTS 2010

<table>
<thead>
<tr>
<th>Visitors</th>
<th>Jobs</th>
<th>Direct Economic Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.8 million</td>
<td>7,098</td>
<td>$1.14 Billion</td>
</tr>
</tbody>
</table>

Source: National and International Visitor Survey, Tourism Research Australia, Tourism Economic Impact Analysis, Compelling Economics

TRENDS IN VISITATION – CONSISTENT VISITATION 2001–2010

Visitation to the Great Ocean Road Region peaked in 2000, coinciding with the Sydney Olympics. Since 2001 the region has received consistent visitation between 6.5 and 7.5 million visitors per year.

FIGURE 1 VISITORS TO THE GOR REGION 2000–2010

Source: National and International Visitor Survey, Tourism Research Australia

VISITOR NIGHTS – GROWTH IN INTERNATIONAL AND INTERSTATE MARKETS

Historical data shows that visitor nights from international and interstate visitors has seen significant growth in the past decade, growing at 8% and 5% p.a., respectively.

FIGURE 2 VISITOR NIGHTS TO THE GOR REGION 2000–2010

Source: National and International Visitor Survey, Tourism Research Australia
**TOTAL VISITOR EXPENDITURE - STRONG GROWTH FROM 2006-2010**

The Great Ocean Road Region has seen sustained growth in visitor expenditure from both the international and domestic visitor markets. Over the past decade, international visitor expenditure has grown at an average of 4% p.a. to $670 million in 2010. In the same period, domestic visitor expenditure has grown by 3% p.a. to a total expenditure of $1.4 billion in 2010.

**TABLE 2 VISITOR EXPENDITURE 2010**

![Graph showing visitor expenditure from 2000 to 2010 for both international and domestic visitors.]

Source: National and International Visitor Survey, Tourism Research Australia

**COMPARISON WITH OTHER REGIONAL TOURISM DESTINATIONS**

The Great Ocean Road Region captures more domestic and international visitors than any other tourism region in Regional Victoria.

**FIGURE 3 VISITATION TO REGIONAL VICTORIA TOURISM DESTINATIONS 2010**

![Bar graph comparing visitation to different regions in Victoria.]

Source: National and International Visitor Survey, Tourism Research Australia
2. Governance and Policy

2.1. Nationally Significant Landscape

The Australian Government supports tourism through the Department of Resources, Energy and Tourism and Tourism Australia. The Government’s 2009 National Long Term Tourism Strategy surmises that in order for Australia to remain competitive in the Global tourism market continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

The Great Ocean Road is one of 10 regions in Australia considered a nationally significant landscape. Australia’s National Landscapes program was developed to provide a long term strategic approach to tourism and conservation to highlight Australia’s most outstanding natural and cultural environments. The program aims to achieve partnerships between tourism and conservation to:

- Promote Australia’s world class, high quality visitor experiences;
- Enhance the value of tourism to regional economies;
- Enhance the role of protected areas in those economies; and
- Build support for protecting our natural and cultural assets.

2.2. Priority Victorian Destination

The Great Ocean Road Region is a key feature in Tourism Victoria’s strategic planning directions. The Nature Based Tourism Strategy highlights the importance of the Great Ocean Road in delivering authentic, memorable experiences to the visitor and identifies a number of tourism infrastructure and product initiatives to achieve this. Other strategies prepared by Tourism Victoria, such as the Regional Action Plan, highlight Tourism Victoria’s commitment to the Great Ocean Road. In conjunction with other government agencies, Tourism Victoria has allocated $2.1 million for promotion of Victoria’s nature based tourism, with a focus on the Great Ocean Walk.

There is significant strategy and policy support at the local and regional level for further development of tourism product and infrastructure in the Great Ocean Road Region. A focus of these is to build on the strengths of the region in nature based tourism. Much of the focus of regional policy is on improving visitor experience through the provision of high quality tourism product and infrastructure. Regional planning has evolved significantly in recent years with the formation of G21 [Geelong Regional Alliance] and Great South Coast economic development organisations. These organisations represent Local Government in the Great Ocean Road Region and have worked collaboratively to prioritise major investment projects in the region.
3. Tourism Development Needs

3.1. Market Segments

A number of the key market segments in the region comprise higher yielding visitors and subsequently have become the focus of product development and destination marketing. The primary market segment for international tourists visiting the Great Ocean Road Region is Experience Seekers. In terms of countries, significant Great Ocean Road Region markets include:

- United Kingdom;
- China;
- Germany;
- Japan;
- United States of America;
- New Zealand; and
- India.

The key Roy Morgan Market Values Segments identified by Tourism Victoria for domestic marketing are Visible Achievement, Socially Aware, Traditional Family Life and Young Optimism. Additionally, the Melbourne short break market is considered important for the Great Ocean Road Region.

3.1.1. Key International Experience Seekers

FIGURE 4 International Market Segments

Source: Tourism Research Australia, International Visitor Survey

2.7 million experience seekers who Australia in 2010, of these 260,000 visited the Great Ocean Road Region. The Great Ocean Road region attracted a higher proportion of experience seekers from United Kingdom, Germany, China and continental Europe. The Great Ocean Road Region is under-represented in experience seekers from New Zealand, Indonesia, Singapore and Japan; both Japan and New Zealand are considered...
key experience seeker markets for Australia. The reason for this is partly due to the product and experience availability in the Great Ocean Road Region, not meeting market segments preferences. For instance, data from the International Visitor Survey highlights that Japanese visitors have a low preference for nature based tourism. The Indian experience seeker market is in its infancy and visitation to the Great Ocean Road Region is currently low (around 3%); however expectations are that this segment will grow significantly over time.

The key experience seeker preferences which overlap across all of the key origin markets include:

**PRIMARY PREFERENCES**

- Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key origin markets.
- Nature based experience. This is the second most common preference for experience seekers from all origin markets and is a key preference for all markets identified except Japan.
- Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

**SECONDARY PREFERENCES**

- Festivals and events. German, British and American experience seekers had a preference for attending festivals and events.
- Walking experience. German and American experience seekers had a preference for a walking experience, however this was not matched by other markets.

**ACCOMMODATION PREFERENCES**

The accommodation preferences for international experience seekers varies significantly by market and highlights the need to provide a variety of accommodation options to meet the experience seeker market demand. Preferences include budget hotels, 4/5 star hotels, guest houses/B&Bs and self-contained accommodation and Tourist Parks.

**YIELD**

The international experience seeker market with the highest yield when visiting the Great Ocean Road Region is Germany. International experience seekers from New Zealand and the United Kingdom have moderate levels of spend in the Region. The emerging market of China has the lowest spend of experience seeker segments in the Great Ocean Road Region.
3.1.2. DOMESTIC MARKET SEGMENTS

FIGURE 5 KEY DOMESTIC VISITOR SEGMENTS

In terms of holiday preferences the following experiences are important to the Visible Achievement and Socially Aware segments:

- Food and wine
- Nature based tourism
- Wildlife

The Great Ocean Road Region attracts high proportions of Visible Achievement and Socially Aware segments, highlighting a good match between product and experience supply and market preferences for these segments.

YIELD

Socially Aware is the highest yielding domestic segment, followed by Traditional Family Life and Visible Achievement. The Great Ocean Road Region’s product mix is well suited to the Socially Aware market preferences.

#Note the remaining 23% of visitors are spread across a six other segments which are less important for tourism due to low travel preferences.

Source: Holiday Tracking Study, Roy Morgan Research

The key Roy Morgan Market Values Segments identified by Tourism Victoria for domestic markets are Visible Achievement, Socially Aware, Traditional Family Life and Young Optimism. These segments contribute around 77% of domestic visitors in Australia.

Of these four market segments the key targets for the Great Ocean Road Region are Visible Achievement and Socially Aware, as these segments are more likely to seek out unique experiences and spend more when visiting.
3.2. FORECAST GROWTH

FORECAST GROWTH IN THE GREAT OCEAN ROAD REGION

Forecasts indicate that the Great Ocean Road Region will attract between 9.6 million and 10.5 million visitors by 2030: a growth of 2.4 million on existing visitation.

TABLE 3 PROJECTED GROWTH SCENARIOS

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2030 Low-Base Growth Scenario</th>
<th>2030 Medium Growth Scenario</th>
<th>2030 High Growth Scenario</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>7.2 Million</td>
<td>9.6 Million</td>
<td>9.7 Million</td>
<td>10.5 Million</td>
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</table>

Source: Great Ocean Road Product Audit

INTERNATIONAL VISITOR FORECAST

Using the low base case scenario, international visitors to the Great Ocean Road region are forecast to increase at 3.9% per annum from 2010 to 2030. This equates to an additional 560,000, or more than double, the international visitors to the Great Ocean Road Region over the period. The experience seeker markets that are projected to grow most in percentage terms are:

- India (8.9%);
- China (8.5%);
- Continental Europe (4.1%);
- USA (3.1%).

By 2030, Continental Europe is expected to provide the most international experience seeker visitors to the Great Ocean Road Region, followed by China.

In terms of visitor expenditure Continental Europe is predicted to strengthen its position as the most important experience seeker segment in the Great Ocean Road Region by 2030. In contrast China’s projected growth is less pronounced when total expenditure is projected, due to the lower yield of the Chinese visitor segment.

DOMESTIC VISITOR FORECAST

Using the base case scenario, domestic visitation is projected to increase by 1.7 million visitors between 2010-2030. The key markets that are projected to grow the most by percentage increase are:

- Traditional Family Life (2.3%);
- Socially Aware (1.1%).

Visible Achievement provided the largest number of visitors to the Great Ocean Road Region in 2010 of all domestic values segments. Forecast projections for the Great Ocean Road Region show that Socially Aware will equal this by 2030. Socially Aware is the highest performing segment in terms of total expenditure in 2010 and by 2030 Socially
Aware will increase its position over other segments in terms of expenditure, highlighting the increasing importance of this Socially Aware for the Great Ocean Road Region.

**FIGURE 7 PROJECTED GROWTH KEY DOMESTIC SEGMENTS (TOTAL VISITORS)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Visible Achievement</th>
<th>Traditional Family Life</th>
<th>Young Optimism</th>
<th>Socially Aware</th>
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<tbody>
<tr>
<td>2010</td>
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<td>2030</td>
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</tbody>
</table>

3.3. GAPS IN TOURISM PRODUCT AND INFRASTRUCTURE

3.3.1. PRODUCT GAPS

Gaps in the region relate to the lack of complementary product and infrastructure supporting the key product themes of the region, such as nature based tourism, food and wine and history and heritage. This includes day visitor facilities, interpretation and accommodation linked to nature based attractions. Food and wine product can be strengthened through leveraging off the seafood strengths and local produce in the region.

The food and wine and nature based tourism experiences in the hinterland are hampered by the lack of connections to the Great Ocean Road.

The table following provides an overview of gaps in tourism product.
### TABLE 4: GAPS IN TOURISM PRODUCT

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Key Strengths</th>
<th>Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Product</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature Based Tourism</td>
<td>Port Campbell National Park, including the 12 Apostles&lt;br&gt;Great Otway National Park&lt;br&gt;Cape Bridgewater/Lower Glenelg NP&lt;br&gt;Marine National Parks&lt;br&gt;Great Ocean Walk, Great South Coast Walk, Surf Coast Walk&lt;br&gt;Tower Hill&lt;br&gt;Waterfalls</td>
<td>Lack of interpretation of natural attractions&lt;br&gt;Poor access to marine National Parks&lt;br&gt;Day visitor facilities at National Parks&lt;br&gt;Accommodation linking to natural attractions&lt;br&gt;Trail infrastructure</td>
</tr>
<tr>
<td>Secondary Product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife</td>
<td>Koalas at Kennett River&lt;br&gt;Kangaroos, emus and Wallabies at Tower Hill&lt;br&gt;Whale and seal watching at Apollo Bay, Warrnambool and Portland&lt;br&gt;Platypus at Lake Elizabeth</td>
<td>Formal infrastructure and facilities at wildlife viewing points&lt;br&gt;Access to whale watching/tours</td>
</tr>
<tr>
<td>Food and Wine</td>
<td>Geelong and Henty wine regions&lt;br&gt;Villages dining&lt;br&gt;Local produce</td>
<td>Fresh seafood sales&lt;br&gt;Fresh seafood restaurants&lt;br&gt;Waterside dining</td>
</tr>
<tr>
<td>History and Heritage</td>
<td>Surfing history&lt;br&gt;Shipwreck history&lt;br&gt;Flagstaff Hill Maritime Village</td>
<td>Quality of surf museum.&lt;br&gt;History of the road itself - consider National, and possible World Heritage Listing</td>
</tr>
<tr>
<td>Art and culture</td>
<td>Village boutiques&lt;br&gt;Surf culture</td>
<td>No large regional gallery outside of Geelong.</td>
</tr>
<tr>
<td>Golf</td>
<td>Coastal courses</td>
<td>Complimentary product - accommodation, food, retail</td>
</tr>
<tr>
<td><strong>Accommodation</strong></td>
<td>Motels&lt;br&gt;3 star quality accommodation&lt;br&gt;B&amp;Bs&lt;br&gt;Coastal Holiday and Caravan Parks</td>
<td>Internationally branded hotels, particularly on the Great Ocean Road (past Torquay)&lt;br&gt;Farm stay&lt;br&gt;Integrated resort, Corangamite Shire</td>
</tr>
<tr>
<td>Cycling</td>
<td>Challenging and scenic trails</td>
<td>Services for cyclists (spares etc.)&lt;br&gt;Complimentary product - Accommodation, food, retail</td>
</tr>
<tr>
<td>Festivals and events</td>
<td>Music festivals&lt;br&gt;Nature based&lt;br&gt;Recreation/sports events</td>
<td>Event venues</td>
</tr>
<tr>
<td>Business Events = Meetings, Incentives, Conventions and Exhibitions</td>
<td>Business Events&lt;br&gt;Conferencing</td>
<td>No large international event venue&lt;br&gt;No large dining venue outside hotels</td>
</tr>
<tr>
<td>Indigenous</td>
<td>Lake Condah/Mt Eccles&lt;br&gt;Tower Hill</td>
<td>Facilities at Tower Hill and Mt Eccles</td>
</tr>
<tr>
<td>Emerging Product</td>
<td>Lorne and Torquay&lt;br&gt;Warrnambool Geothermal Spa</td>
<td>No large spa or wellness facility&lt;br&gt;Geothermal spas</td>
</tr>
<tr>
<td>Spa and well-being</td>
<td></td>
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</tbody>
</table>
3.3.2. INFRASTRUCTURE GAPS

The following infrastructure items are identified for improvement in the Great Ocean Road region; these will assist to support the growth of tourism.

- Improvements and capacity of the Great Ocean Road. The Great Ocean Road is at capacity during peak times. Improvement to parking bays, rest areas and passing bays needs to be explored. The general road quality also needs to be improved;

- Princes Highway. The Princes Highway is in poor condition from Winchelsea to Warrnambool, there is a need to improve the road into a dual carriageway to support growth in population and visitors. This project will be staged over the next 10 years, with the first stage underway.

- Harbours, marinas, piers and jetties. There are numerous development plans in places for harbours and marinas along the coast. These will improve water access significantly in the region;

- Park infrastructure. There is a need to improve facilities and infrastructure at various parks locations across the region to meet visitor expectations;

- Airport upgrades. Airport upgrades are required at Warrnambool and Avalon. This will improve access into the region significantly;

- Public transport. Improved regularity of train services along the Princes Highway Corridor and significantly improved public bus transport along the Great Ocean Road is necessary to meet existing and future demand for independent travellers. There is also a need to upgrade the rolling stock servicing this corridor.

- Accommodation. There are areas within the Great Ocean Road region that lack tourist accommodation, particularly internationally branded accommodation at the higher end of the market.

3.4. PROJECTED INVESTMENT NEEDS

ACCOMMODATION

An additional 3,440 commercial guest rooms will be required across the Great Ocean Road Region should the high growth scenario be reached by 2030. Indicatively, the following accommodation establishments will be required to support projected growth:

- Up to 4 large resorts of 4.5 star standard;
- 90 farm stay accommodation establishments;
- Up to 5 new large backpacker hostels;
- Up to 5 new caravan or tourist parks;
- Up to 12 new hotels/motels of various scale and star rating including budget and also 5 star with international branding;
- Up to 50 Guest houses and B&Bs;
- Self-contained apartments and houses across the region.

Some of the projected requirement for additional capacity should be directed to existing accommodation establishments. Increasing the size of existing establishments would improve economies of scale and viability of businesses.

TRANSPORT

Transport in and to the region will need to be improved to support the forecast growth in visitation. The following strategies are considered critical to provide for long term growth:

- Princes Highway duplication to Colac;
- Continuous improvement of safety and road quality including shoulder sealing, ongoing maintenance, and rescaling sections on the Great Ocean Road and associated link roads.
- Additional rail services and new rolling stock to cater for visitors travelling by train;
- Increased bus services on the Great Ocean Road;
- Air services to international markets through Avalon Airport.
The base case scenario of an additional 2.4 million visitors will have a significant impact on attractions in the region. Capacity and infrastructure at existing attractions will need to be upgraded to support forecast demand, whilst new attractions suited to key visitor markets should also be considered in the region.
PART B
TOURISM OPPORTUNITIES

Presents game changer projects for the Great Ocean Road Region as well as specific destination based opportunities.
4. **GAME CHANGER PROJECTS**

4.1. **INTRODUCTION**

The following section presents eight priority investment projects that have been identified as having the greatest potential to transform the tourism landscape.

These projects were initially identified in the Great Ocean Road Tourism Product Gap Audit. These projects best meet the following criteria developed in conjunction with the project control group.

**HIGHEST WEIGHTED CRITERIA (RANKING OUT OF 40)**

- **Game changer.** Project will have major impact on tourism in the region by enabling significant new investment. In addition the project is a game changer if it has the potential to influence visitation to the State of Victoria as a whole and also provides the opportunity to showcase the Victoria.

**HIGH WEIGHTED CRITERIA (RANKING OUT OF 30)**

- **Matches to/enables demand by experience seeker segments.** Preferences for key target international and interstate experience seeker markets have been met;

- **Creates/ enables an iconic experience.** Projects which provide or facilitate an iconic experience in the Great Ocean Road Region which becomes a motivator for travel;

- **Encourages yield, length of stay of visitors.** Projects which encourage greater visitor yield as opposed higher levels of lower yielding visitors;

- **Creates/ enables additional capacity.** Projects which create more capacity within the region to accommodate projected growth;

- **Facilitates/ enables new niche higher yielding visitor markets.** Projects which provide a new experience which encourages new higher yield markets to visit which may not currently being accommodated in the region.

**MEDIUM WEIGHTED CRITERIA (RANKING OUT 20)**

- **Encourages/ enables seasonal dispersal of visitors.** Projects which encourage visitation during the off peak and shoulder periods;

- **Encourages/ enables geographic dispersal of visitors.** Projects which encourage dispersal of visitors to geographic locations which do not attract high levels of peak visitation.

**LOW WEIGHTED CRITERIA (RANKING OUT OF 10)**

- **Matches/ enables demand from Melbourne short break market.** These are locations of product and product typologies that meet the high yield Melbourne short break market.

There were a number of other projects which are also important for tourism in the region; these are included in Section 5.
1. PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE

ESTIMATED PROJECT COST

$100 Million

ECONOMIC IMPACT

Short term: $281,500,000, 710 Jobs

Annual operational impact: $19m, 99 jobs

PROJECT OVERVIEW

The Loch Ard Gorge interpretive Centre proposal is for a facility incorporating a state of the art interpretive and education facility, food and beverage facilities, tours and information centre.

Port Campbell National Park attracts over 2 million visitors annually, of which a large proportion are daytrip visitors. The visitor experience of the National Park is limited to trails, static information displays and viewing platforms. In order to meet the expectations of experience seeker visitors, there is a need to further invest in infrastructure to provide a positive, value-adding experience that generates additional spend in the region. This includes nature based activities as well as food related and dining opportunities in appropriate locations.

2. GREAT OCEAN WALK

ESTIMATED PROJECT COST

$10 Million

ECONOMIC IMPACT

Short term: $21,850,000, 71 Jobs

Annual operational impact: cannot be determined without further research

PROJECT OVERVIEW

The Great Ocean Walk has developed into one of the iconic experiences within the Region. The walk, whilst navigable, has a number of areas where further infrastructure improvements and trail development is required.

Further investment in trail infrastructure is required to transform the Great Ocean Walk to a walk of international status.

The walk provides opportunity to retain visitors in the region for greater periods, and also encourages further investment from the private sector in nature based accommodation and other tours and activities.
3. GREAT OCEAN ROAD SIGNATURE ACCOMMODATION, MOONLIGHT HEAD

ESTIMATED PROJECT COST

$20 Million

ECONOMIC IMPACT

Short term: $43,705,000, 135 jobs

Annual operational impact: $59 million, 158 jobs

PROJECT OVERVIEW

There is not a signature accommodation provider in the Great Ocean Road Region. However, there are a number of settings which provide opportunity for world class branded accommodation. Areas around Moonlight Head provide a unique wilderness setting for this type of accommodation.

Permits are in place for a high quality 5 star hotel at Moonlight Head, although there is little evidence that this project will proceed in the immediate term.

Victoria is the only state in Australia which does not have a ‘luxury lodge’ as identified by luxurylodgesofaustralia.com.au.

4. LAKE CONDAH/ BUDJ BIM NATIONAL HERITAGE LANDSCAPE

ESTIMATED PROJECT COST

$54 Million

ECONOMIC IMPACT

Short term: $99,600,000, 181 jobs

Annual operational impact: $8 million

PROJECT OVERVIEW

There is significant aboriginal history and heritage at Lake Condah. The area provides a new and interesting story around aboriginal culture and contrasts greatly with the nomadic aboriginal culture of northern Australia. The story at Lake Condah has been strengthened considerably with the construction of a weir which has led to the reinstatement of Lake Condah as a permanent water body. The project includes improved interpretive experience, accommodation and guided tours.
5. AVALON AIRPORT UPGRADE

ESTIMATED PROJECT COST
$15 Million

ECONOMIC IMPACT
Short term: $32,775,000, 92 jobs
Annual operational impact: $519 million, 1,076 jobs

PROJECT OVERVIEW
There is potential for Avalon Airport to be developed for international arrivals and departures. Some upgrades to infrastructure will be required to facilitate this.

International arrivals directly into Avalon Airport will reduce travel times to destinations in the Great Ocean Road Region. An international airport will allow visitors to travel direct from the airport into the region for the first night's stay. The upgrade of Avalon Airport will be a significant game changer for the region as it will effectively provide Geelong and the Great Ocean Road Region with its own international airport. This will allow Geelong and surrounding areas to further develop into a significant international destination, providing ready access to some of the iconic product in the Great Ocean Road Region.

In addition, the upgrade of Avalon Airport will provide a second international airport in Victoria which will allow for additional capacity for visitors to enter the state.

6. GREAT OCEAN ROAD UPGRADE

ESTIMATED PROJECT COST
$50 Million

ECONOMIC IMPACT
Short term: $114,432,000, 293 jobs
Annual operational impact: Cannot be determined without further research

PROJECT OVERVIEW
The Great Ocean Road is the key piece of infrastructure as well as product in the region. It provides the iconic driving experience and also links the numerous tourism villages and destinations along the coast. It is essential that the road is maintained and developed to meet forecast demand from visitors.

The road is not currently prioritised as a road of national significance, however its importance for the region's economy cannot be understated.

There is potential for the Great Ocean Road to become a 'showcase' road to reflect its importance for touring. This would see the road being redeveloped with premium road surfaces, shoulder sealing and improvements to link roads which provide access to the Great Ocean Road.
7. GREAT OCEAN ROAD INTEGRATED RESORT, PORT CAMPBELL AREA

**ESTIMATED PROJECT COST**

$35 Million

**ECONOMIC IMPACT**

Short term: $76,475,000, 249 jobs

Annual operational impact: $19 million, 195 jobs

**PROJECT OVERVIEW**

There are no internationally branded, integrated resorts along the Great Ocean Road near Port Campbell National Park. There is potential to develop an integrated resort development which provides a number of accommodation options for visitors. This will ensure that touring markets are appropriately catered for in close proximity to the iconic product, and provide incentive for visitors to stay longer in the region.

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8. GEELONG CONVENTION AND EXHIBITION CENTRE

**ESTIMATED PROJECT COST**

$200 Million

**ECONOMIC IMPACT**

Short term: $437,000,000, 1,136 jobs

Annual operational impact: $49 million, 262 jobs

**PROJECT OVERVIEW**

A Geelong Region Convention and Exhibition Centre will position the region as a viable, well located option that complements Melbourne and stamps Victoria as a global and national competitor for business events. The Geelong Convention and Exhibition Centre, whilst not specifically targeting experience seeker markets, will provide greater profile of the Great Ocean Road Region in international business markets and will enable visitation to the region through attraction of visitors to the venue.

Business events currently generate approximately $1 billion per annum, or 9% of Victoria’s total tourism revenues. Geelong businesses already generate over 2,000 events per annum that are accommodated in inadequate venues. An additional 16% of events are lost to Melbourne because of deficient facilities.

In addition, the Centre will encourage visitation throughout the Great Ocean Road Region through pre- and post- trip tours and provide event organisers with the option to include field visits in their schedule to increase the attractiveness of events. The Convention and Exhibition Centre is a significant game changer for the Great Ocean Road through increasing exposure of the region to new markets and providing a new destination at the region’s gateway city.
5. Tourism Opportunities by Key Visitor Node

5.1. Introduction

The following section presents all of the infrastructure, product and experience opportunities for the Great Ocean Road. Information presented in this section draws upon both products identified within the product gap audit undertaken for the Department of Energy Resources and Tourism, as well as opportunities identified within the experience audit undertaken for Great Ocean Road Tourism. Extensive consultation through the Great Ocean Road Region has led to the identification of priority projects and other business opportunities.

For the purpose of this section, the opportunities within the region have been divided into the 11 visitor nodes below, including opportunities that affect the region as a whole. These 11 visitor nodes have been identified as they represent a concentration of tourism product and experiences in a certain town or area within the Great Ocean Road region.

- Geelong
- Bellarine
- Torquay
- Lorne & Anglesea
- Otway’s Hinterland
- Apollo Bay & Cape Otway
- Lakes and Volcanoes
- Port Campbell and Surrounds
- Warrnambool & Port Fairy
- Portland and Surrounds
5.2. GEELONG

ABOUT GEELONG

The City of Geelong has an enviable position. Just an hour from Melbourne, it is set on Port Phillip Bay with a well-developed waterfront precinct and a renowned and award-winning local wine region. It’s fascinating past is brought to life in cultural attractions, public art installations and heritage buildings. As a large regional city Geelong has a thriving entertainment scene, quality hospitality venues and a large diversity and number of accommodation facilities.

PRIORITY INVESTMENT PROJECTS

1. Upgrade of Avalon Airport to International Standard. Establishment of an international terminal to accommodate international flights.

2. Development of Geelong Convention and Exhibition Centre including Eastern Beach Spa Complex. A major centre housing a 1200 person function space, 1000 seat auditorium, 4000m2 exhibition area, 200 room hotel and spa complex.

3. Improvement and development of cruise ship infrastructure. Terminal and infrastructure to support cruise shipping.

OTHER BUSINESS OPPORTUNITIES

- Day or overnight tours of Geelong Region wineries from Melbourne. There are very few tours linking Melbourne with the Geelong Wine Region, the diversity and quality of wine provides tour opportunities with a significant opportunity.

- Signature dining on Geelong’s Waterfront. Geelong’s waterfront is growing in prestige and there remains further opportunity for signature dining in the precinct.
5.3. BELLARINE

ABOUT BELLARINE

The charming towns and villages of the Bellarine offer a huge range of things to do. The Bellarine Peninsula faces Port Phillip Bay on its northern and eastern shores and Bass Strait on the south. This provides numerous water activities, ranging from gentle bay beaches that are great for families and fishing to sensational surf beaches and world-class scuba diving sites.

The Bellarine has been building a reputation as a food and wine destination and the Bellarine Taste Trail brings together many of the gourmet offerings of the region including wineries, restaurants and cafes, breweries, fresh produce, goats cheese, olive oil and seafood.

Key tourist towns on the Bellarine include Portarlington, Queenscliff, Point Lonsdale, Ocean Grove and Barwon Heads.

PRIORITY INVESTMENT PROJECTS

1. **Portarlington Harbour.** Portarlington harbour upgrade including a new town square, beachfront boardwalk, enhancement of open spaces, new and improved pier, improved protection for boats, expansion of marina and mooring facilities.

2. **Bellarine shared use trail.** Development of a north-south horse and off road cycling trail on the Bellarine, from Portarlington in the north to Queenscliff in the south.

3. **Queenscliff Amphitheatre.** Marine amphitheatre development at Queenscliffe Harbour to showcase stingray feeding.

OTHER BUSINESS OPPORTUNITIES

- **Large dining offer.** There are very few facilities on the Bellerine that can cater for large business groups and events, there is opportunity for a facility that provide large capacity dining options.

- **Fort Queenscliff.** Redevelopment of Fort Queenscliff with improved interpretation and tours will provide a new heritage attraction for the Bellarine.

- **Seafood experience.** Seafood cooking classes integrated with a premium seafood restaurant or fishing charter on one of the Bellarine’s coastal towns.
5.4. TORQUAY

ABOUT TORQUAY

Torquay is home to Bells Beach and is the birth place of iconic surf brands: it is the surfing capital of Australia. Located 95km South West of Melbourne, it is the official start of the Great Ocean Road.

Torquay offers a range of food and wine, unique shopping at Surf City retailers, beginner surf lessons and for the more experienced, surfing at Bells Beach.

PRIORITY INVESTMENT PROJECTS

1. Redevelopment of Surf City. Multi-faceted project includes a number of tourism elements including new Surf City precinct (retail and offices), Surf World museum and VIC and conference facilities.

2. Bells Beach improvements. Upgrade to the car park and visitor facilities and enhancement of the visitor experience by greatly improving the interpretation and education opportunities.

3. Torquay Foreshore Caravan Park upgrade. Staged upgrade of the caravan park including power upgrades, new cabins and landscaping.

4. Redevelopment of Torquay's Fisherman's Beach precinct. Fishermans Beach redevelopment will deliver a brand new, purpose-built community, tourism and recreation facility on the Torquay foreshore including new and improved facilities for the Torquay Angling Club and new restaurant and kiosk.

5. Surf Coast Walk. Staged delivery of a shared cycle and walking trail from Torquay to Lorne.

OTHER BUSINESS OPPORTUNITIES

Torquay has seen a substantial amount of development over the past decade, with a new accommodation facility on the Esplanade, a golf resort and a shopping centre. However new business opportunities will come from a number of the priority investment projects, such as dining and retail opportunities.
5.5. LORNE & ANGLESEA

ABOUT LORNE AND ANGLESEA

Lorne, Anglesea and Aireys Inlet are popular and scenic coastal towns along the Great Ocean Road. Each of the towns is surrounded by the Otways Forrest and provides spectacular views over the Coast. Key features include Split Point Lighthouse, Great Otway National Park, patrolled beaches, cafes and restaurants, and entertainment facilities.

Lorne presents a key accommodation node along the Great Ocean Road and houses the last branded accommodation before Warrnambool.

PRIORITY INVESTMENT PROJECTS

6. **Point Grey Redevelopment.** Redevelopment of the Port Grey precinct, Lorne including an improved dining experience, upgraded coo, improved landscaping and improved water access.

7. **Great Ocean Road Heritage Centre.** The “Great Ocean Road Heritage Centre” would tell the story of the construction of the Great Ocean Road and become a centre for permanent and temporary displays on the history of the Great Ocean Road. The Great Ocean Road Heritage Centre will be co-located with the Lorne Visitor Information Centre.

OTHER BUSINESS OPPORTUNITIES

- **Signature dining on the Lorne waterfront.** There is further potential for signature dining in Lorne. The redevelopment at Point Grey will provide opportunities for this.

- **Fishing/surf fishing and sailing adventures.** Improved water access will provide further opportunity for fishing charters and other water based tours from Lorne.
5.6. OTWAY’S HINTERLAND

ABOUT THE OTWAY’S HINTERLAND

The Otway’s hinterland is an emerging food area, with numerous operators selling from farm gate. The region is also home to unique and interesting rural townships including Birregurra, Forrest, Pennyroyal and Deans Marsh.

Forrest, a former timber town, is now a growing tourist hub with high quality mountain bike trails and complimentary tourist facilities.

The newly developed Otway Harvest Trail provides an opportunity for touring the Otway Ranges whilst trying some of the excellent local produce.

PRIORITY INVESTMENT PROJECTS

1. Great Ocean Road and Link Roads Upgrade. Continuous improvement of the Great Ocean Road and link roads to a ‘showcase’ standard to reflect the road’s role for tourism.

OTHER BUSINESS OPPORTUNITIES

• Hinterland accommodation including farm stays. The Hinterland provides opportunity for overflow accommodation capitalising on the pristine Otway’s countryside and provides an alternative to coastal accommodation.

• Increased variety of operators within the Otway’s Harvest Trail. There is further opportunity for new operators to develop their farm gate business in the Otways.

5.7. APOLLO BAY & CAPE OTWAY

ABOUT APOLLO BAY & CAPE OTWAY

Apollo Bay is at the Centre of the Great Ocean Road. Set on a scenic sheltered bay, the township provides an excellent location for boating, swimming and other water based activities. Apollo Bay is provides an excellent starting point for the Great Ocean Walk or a hub for exploring the Otway Ranges and Cape Otway.

PRIORITY INVESTMENT PROJECTS

1. Apollo Bay Internationally Branded Hotel. A 4.5 star 60+ room hotel in Apollo Bay focused towards both international and domestic markets. (This may be included within the Marina and Harbour project);

2. Apollo Bay Harbour and Marina Project. Project includes a new Fisherman’s Co-operative, commercial buildings (restaurants), new recreational marina (including deepening); and new saltwater outdoor lap pool;

3. Cape Otway Lighthouse and Koala Experience Centre. New product and experiences at the Cape Otway precinct including a day visitor and interpretive centre with food and beverage operation, raised boardwalks and walking trails for Koala viewing, nature based accommodation and improvements to Lighthouse interpretation and on site accommodation.

4. Otway Ranges Touring Route. Designation of a touring route through the Otway Ranges including improved signage and marketing.

OTHER BUSINESS OPPORTUNITIES

• Licensed fishing and wildlife charters.
5.8. LAKES AND VOLCANOES

ABOUT THE LAKES AND VOLCANOES

The Lakes and Volcanoes region refers to the area north to north east of Port Campbell and includes the towns of Terang, Camperdown and Cobden. The area is home to Kanawinka Geopark, whose landscape is dotted with volcanic formations including deep crater lakes and conical peaks which are said to have erupted between 5,000 and 20,000 years ago.

Visitors have the opportunity to explore the region via a number of walking trails and enjoy the beautiful vistas from the top of Mount Leura, Mount Noorat and Mt Elephant and explore the numerous volcanic lakes such as Bullen Merri and Purrumbete.

PRIORITY INVESTMENT PROJECTS

1. **Volcanic lakes infrastructure improvements.** Improvements to water access and foreshore reserves including fishing jetties.

2. **Visitor and interpretive centre at Mt Elephant.** A planned interpretive centre

OTHER BUSINESS OPPORTUNITIES

- **Food, beverage and accommodation** facilities overlooking the crater lakes and in proximity to geological forms.
5.9. PORT CAMPBELL AND SURROUNDS

ABOUT PORT CAMPBELL AND SURROUNDS
This section of the Great Ocean Road incorporates one of the key visitor attractions of the region, the dramatic rock sculptures of the 12 Apostles, which is located within Port Campbell National Park, just west of Princetown.

Key attractions include the 12 Apostles and Loch Ard Gorge, as well as the Gibsons Steps, the Bay of Martyrs and Bay of Islands. In addition to the stunning coastal landscape, visitors can be treated to a number of wildlife viewing opportunities.

There is also an emerging gourmet food precinct north of Port Campbell in the Timboon area, which provides added incentive for visitors to stay longer in the region.

PRIORITY INVESTMENT PROJECTS
1. Port Campbell Precinct and Loch Ard Interpretive Centre. The establishment of a significant interpretive centre at Loch Ard Gorge and upgrade to Parks infrastructure throughout the Port Campbell area.
2. Great Ocean Road Integrated Resort, Port Campbell Area. A 4 star internationally branded resort in the Port Campbell area with outstanding coastal views. This would cater for large coach groups and independent touring visitors.
3. Great Ocean Road Signature Accommodation. A 5 star internationally branded wilderness lodge in the Moonlight Head area with outstanding coastal views.
4. Apostles Shared Trail. Investment in a shared use trail which links Timboon to Port Campbell and on to the 12 Apostles.
5. Accommodation for walkers. Self-contained nature based accommodation in various locations linking to the Great Ocean Walk.

OTHER BUSINESS OPPORTUNITIES
- Glenample Homestead redevelopment. There is opportunity to redevelop the Glenample homestead to provide accommodation in close proximity to the 12 Apostles.
- Adventure boat cruises from Port Campbell of the 12 Apostles. Leaving from Port Campbell, this will provide a new way to experience the 12 Apostles.
- See or estuary kayak tour off Port Campbell or Peterborough. Opportunity for tour operators to provide a unique water based experience in the Port Campbell area.
- Organised tours including food experience of the 12 Apostles Gourmet Trail. Growing in reputation the trail provides a unique opportunity to provide a food experience to visitors travelling to Port Campbell.
- Expanded farm gate offer and experience within the 12 Apostles Gourmet Trail. Further potential for new operators to develop farm gate and link to the trail.
5.10. WARRNAMBOOL & PORT FAIRY

ABOUT WARRNAMBOOL AND PORT FAIRY

Warrnambool is South West Victoria’s major regional centre and is set on the rugged and majestic Shipwreck Coast. It is home to Flagstaff Hill Maritime Village which houses an extensive collection of shipwreck and maritime artefacts.

Tower Hill Native Game Reserve is a key visitor attraction located mid way between Warrnambool and Port Fairy. It is a significant wildlife haven and key Aboriginal heritage site.

Port Fairy is a fishing village boasting an impressive collection of intact cottages from the 1800s. It is also home to hugely successful Port Fairy Folk Festival and a number of dining experiences.

PRIORITY INVESTMENT PROJECTS

1. **Flagstaff Hill Continuous Improvement.** The continuous improvement of Flagstaff Hill includes group accommodation, temporary exhibition space, night show enhancements, slipway redevelopment and a expanded function centre.

2. **Upgrade of Warrnambool Airport (lengthening of runway).** Lengthen and strengthen the Warrnambool Airport to support passenger jets.

3. **Tower Hill Native Game Reserve.** Product and infrastructure included as part of the masterplan concept includes high quality walking trails, including board walks, bird watching facilities, wildlife watching platforms with interpretation, geological and aboriginal interpretation, improved day visitor facilities including picnic tables, bbqs and toilets, fixed tent accommodation.

4. **Upgrade V Line rolling stock and increase services.** New trains purchased for the Warrnambool line.

5. **Warrnambool Harbour.** Staged works to improve infrastructure and capacity of the Warrnambool Harbour

TOURISM BUSINESS OPPORTUNITIES

- Development of diving opportunities off the coast. Including potential sinking of a wreck off Warrnambool or Port Fairy.
- Attraction of world class exhibitions to Warrnambool Art Gallery.
- Development of maritime linkages between Flagstaff Hill Maritime Village and Loch Ard Gorge Interpretive Centre.
5.11. PORTLAND AND SURRounds

ABOUT PORTLAND

Portland is located on stunning coastline at the western end of the Great Ocean Road Region. It is known for the abundance of marine life and attracts a healthy number of visitors keen to reel in some salmon, tuna or King George Whiting. Opportunities to view whales off the Portland Coast is also a key visitor attraction as is the maritime history of the town.

PRIORITY INVESTMENT PROJECTS

1. Lake Condah/ Budj Bim National Heritage Landscape. Major new infrastructure established to promote aboriginal tourism, including nature based accommodation, development of nodes across the Lake Condah/Mount Eccles area, development of a new international learning centre, reinstatement and interpretation of eel trapping and stone dwellings, heritage trails, interpretation of the church mission site, education and bush food tours.

2. Portland foreshore redevelopment. Staged redevelopment of Portland Foreshore and harbour to provide a world class port, beach and marina.

3. Cruise Ship Infrastructure - Improvements to cruise ship infrastructure to provide improved entry to the Great Ocean Road Region.

TOURISM BUSINESS OPPORTUNITIES

- Whale watching tours from Portland. Opportunity for tour operators to leave from Portland for whale watching and other wildlife tours.

- Retailing fresh seafood from Portland Harbor. Portland has an abundance of fresh fish caught and brought back to port, there is opportunity to develop the seafood experience through improved seafood retail and dining opportunities.

- South West Walk continuous improvement including tour operators. South West walk offers spectacular coastal scenery and has the potential to be developed as a great icon of Victoria’s west coast.

- Licensed Game Fishing Charters. There is potential for further development and promotion of game fishing charters, particularly during the renowned tuna season.
Identifies the way forward for delivering investment to the Great Ocean Road Region
6. **Next Steps**

6.1. **Overview**

Further work is required to deliver the opportunities for the Great Ocean Road.

This section provides recommendations relating to delivery of gaps and opportunities identified through the Product Gap Audit and Experience Audit undertaken in the Great Ocean Road. It provides key areas of focus for delivery of infrastructure, product and experience development in the Great Ocean Road.

Areas of focus include:

- Product development;
- Removal of barriers to investment;
- Investment attraction.

6.2. **Product Development**

**Seafood**

Seafood, and its variety, is a strength of the region. However the accessibility to fresh seafood by visitors is limited through low awareness and poor infrastructure and product.

Further detailed work in the Great Ocean Region should focus on the following:

- Establish a seafood reference group;
- Audit of seafood available across the region;
- Audit of locations where fresh seafood is accessible;
- Identify and recommend how to deal with accessing seafood in the region, such as where co-ops could be strengthened;
- Identify sites throughout the region which could attract seafood related development/dining experiences;
- Specific opportunities for private investment in tours and food experiences; and
- Development of a themed Great Ocean Road Seafood experience tour that links the entire region.
WILDLIFE

Wildlife is a recurring theme across the Great Ocean Road Region, however the infrastructure and accessibility of this experience is limited. There is a need to strengthen the visitor experience through improved infrastructure across the region.

Further detailed work in the Great Ocean Road Region should focus on the following:

- An audit of all wildlife sites and supporting infrastructure available;
- An audit of existing collateral and marketing material relating to wildlife sites;
- Identify infrastructure which could be developed to support the wildlife experience. This includes directional signage, interpretive signage, viewing platforms and associated smart phone applications; and
- Specify opportunities for wildlife tour operators and other private sector investment.

MARITIME HISTORY

The maritime history of the region is unquestionably one of its strengths. This is well developed and recognised in some areas, through well-developed attractions such as Flagstaff Hill and at Loch Ard Gorge. There is potential to strengthen this theme across the entirety of the Great Ocean Road, from Geelong to Portland.

Further strategic work should focus on the following:

- Audit of all maritime history sites - shipwrecks, lighthouses, cannons etc;
- Identification of existing maritime history infrastructure; and
- Development of a themed Great Ocean Road maritime history experience tour that links the entire region.

DIVING

There has been potential identified in relation to creating additional diving opportunities along the coast. The region already boasts a unique diving environment; however there is potential to enhance the experience and encourage further marine life to thrive through sinking a vessel or piece of art such as took place off the coast at Ocean Grove in 2009.

Further work should focus on the following:

- Establish a diving reference group;
- An audit of current significant dive sites along the coast;
- Identification of potential dive sites and supporting infrastructure;
- Undertaking a cost analysis in relation to sinking a dive piece in the west of the region (Warrnambool or Port Fairy);
- Developing opportunities for private investment in diving tours.

EVENTS

There are numerous music and recreational events across the Great Ocean Road Region. However there is no overarching strategy to provide goals and directions for existing and potential events. An events strategy will help to determine which events are suited to the Great Ocean Road Region and where there are gaps in the timing, location and theme of events.

Further work should focus on the following:

- Gaps and opportunities for events;
- Responsibility for event development;
- Marketing of events;
- Themes for events to be explored: outdoor adventure, cycling, food and wine, music.
- Identify events which come become ‘internationally’ focused.
LUXURY TRAVELLERS

Evidence from international wholesalers indicates that luxury international travel in the Great Ocean Road Region is almost non-existent. The core reason for this is the lack of product targeted to this market, in particular high quality signature accommodation. There is a need to investigate this market more thoroughly and identify experiences and opportunities to attract this niche and lucrative visitation.

Further strategic work should focus on the following:

- Case studies of other luxury destinations;
- Identification of needs to support this market;
- Promote the development opportunities required to attract this market;
- Spa and wellness product.

6.3. REMOVAL OF BARRIERS

RURAL ZONES

The Farming Zone and Rural Conservation Zones in the rural areas of the region place significant limitations on tourism use and investment. Limitations on tourism uses in the Farming Zone include:

- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property);
- Helicopters are unable to land in a Farming Zone, unless it is for a farming use, which limits the possibility for tourist uses.

In Rural Zones where the increasing demand for residential and tourism uses necessitates increased flexibility, implementation of Rural Activity Zones or Special Use Zones should be considered. The Golden Plains Shire provides an example, where recently the Moorabool Valley was rezoned to facilitate tourism in the area. Corangamite Shire has also undertaken an extensive study which recommends rezoning in some rural areas to accommodate tourism development. One of the gaps noted in recent planning panel reports is identification of strategic rural areas for tourism development facilitation.

Further strategic planning work should focus on the following:

- Agreement on a standard approach to facilitating tourism development in the rural zones.
- Identify strategic nodes in rural areas where tourism development is needed and should be supported.
- Utilise the product gap audit, experience audit and tourism opportunities study as justification for recommendations.
TOURISM DEVELOPMENT ON PUBLIC LAND

There are a number of issues around public land regulation for tourism purposes that pose a barrier and threat to private sector investment. The Victorian Tourism Industry Council has acknowledged and provided a number of recommendations in relation to the issues identified below:

Some operators believe that the leasehold length for public land is too short, making it difficult to obtain investment funding and make substantial capital investments. In 2009 amendments to the Crown Land Act extended the normal lease period to 21 years, with provision for the Minister to offer 50 to 99 years if there is to be a new building erected or improvements to be made. In comparison, Queensland and Tasmania offer 99 year leases. Extending the length of the leasehold and assessing each lease on its individual merits will help facilitate investment in public land through providing certainty of tenure.

Victoria’s Competitive Neutrality Policy’s objective is to ensure that those benefiting from public resources do not distort the market when competing with private enterprise: this is also an issue with the leasing of public land. To ensure that operators on private land remain competitive with operators leasing Crown Land, rents must be set at a rate equivalent to the broader market.

Further to this, there is some concern in the tourism community regarding government agencies such as Parks Victoria facilitating development on Crown Land. It is important for considerable analysis to be undertaken by Government to justify each development that they undertake, to provide assurances to the local community that the development will be beneficial to the region’s economy, and not impact on existing tourism operators.

Public land offers the capacity to deliver the opportunities identified in this report. A study which reviews public land holdings and identifies sites which may be used for private sector investment should be undertaken.

Further strategic work should focus on the following:

- Developing clear guidelines for tour operators in National Parks
- Determining a set number of licenses for National Parks, so as not to flood the tour market;
- Identifying areas with low environmental values, but high scenic qualities which could be leased for development.

SUPPORTING INFRASTRUCTURE

Discussions with developers during the course of the study has highlighted the need for Government to provide some additional incentive to attract investment in a very competitive and difficult market post GFC. In particular, assistance with servicing infrastructure in locations identified for tourism investment would provide boosted incentive.

Further investigation into strategic locations utilised for tourism investment should be accompanied by a study investigating servicing needs and costs. In addition the Great Ocean Road Region should lobby Government to help fund servicing infrastructure in these strategic locations.

6.4. ATTRACTING INVESTMENT

MARKETING AND PROMOTION

Promoting the opportunities for investment is critical to attracting interest in the Great Ocean Road Region. There is now extensive data and information regarding opportunities, tourism markets and projected demand in the region however further packaging of investment sites should follow.

This should focus on sites that are investment ready, and provide specific details on these sites in order to attract investment, including details around land area, services provided, and appropriate zoning.

FACILITATING INVESTMENT

Facilitating investment in the region has primarily been the role of Local Government. There may also be a role for an officer to facilitate investment in the Great Ocean Road Region, who has strong links with State Government and large investors, and who can act as a conduit between Local Government and potential investors. This allows the Great Ocean Road Region to provide a more competitive and provide a greater range of investment opportunities than a single Council.
Great Ocean Road – Tourism Economic Impact Analysis

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Great Ocean Road – Tourism Economic Impact Analysis

Great Ocean Road: Tourism Economic Impact Analysis

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RESOURCES

All modelling has been undertaken using REMPLAN™ software that has been authored by Principal Research Fellow (ret.), Ian Pinge, at La Trobe University Bendigo.

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1. Executive Summary

The Great Ocean Road spans over 200 km from the City of Greater Geelong in the East through to Glenelg Shire in the West which meets the border with South Australia. The region supports an estimated 126,404 jobs. A key objective of this study has been to estimate the proportion of these jobs that are supported by the demand for goods and services by visitors to the region, as opposed to demand by local residents.

ES - 1 Employment Servicing Visitors and Remainder Servicing Locals

<table>
<thead>
<tr>
<th>Industry</th>
<th>Jobs Supported by Visitors</th>
<th>Jobs Supported by Locals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>9,255</td>
<td>17,821</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>4,901</td>
<td>11,012</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>1,550</td>
<td>15,679</td>
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<tr>
<td>Arts &amp; Recreation Services</td>
<td>3,283</td>
<td>17,960</td>
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<tr>
<td>Health Care &amp; Social Assistance</td>
<td>4,519</td>
<td>4,816</td>
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<tr>
<td>Administrative &amp; Support Services</td>
<td>1,547</td>
<td>9,389</td>
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<tr>
<td>Manufacturing</td>
<td></td>
<td>98</td>
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<tr>
<td>Other Services</td>
<td></td>
<td>2,390</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td></td>
<td>1,393</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>5,096 jobs</td>
<td></td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Sewer Services</td>
<td>1,266 jobs</td>
<td></td>
</tr>
<tr>
<td>Public Administration &amp; Safety</td>
<td></td>
<td>6,883</td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td>8,483</td>
</tr>
<tr>
<td>Tourism</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rest of Economy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Of the 126,404 people employed in the Great Ocean Road, it is estimated that demand by visitors for goods and services supports 7,098 jobs (highlighted in yellow above). That is, the tourism sector represents 5.6 percent of total employment in the Great Ocean Road. The major tourism related activities include accommodation & food services (3,693 jobs), retail trade (1,483 jobs), transport (510 jobs), education & training (505 jobs) and arts & recreation services (272 jobs). The map below highlights concentrations of tourism jobs across the Great Ocean Road.

ES - 2 Key Tourism Employment Locations

The map above highlights the fact that there are key nodes of tourism activity in the region which generate the bulk of the tourism output across the Great Ocean Road. This report addresses the total value of tourism for the region and also its relative importance for each for the local government areas within the Great Ocean Road.

- **Moyne Shire** - 277 jobs in the tourism sector, or 4.9 % of total employment
- **Golden Plains Shire** - 48 jobs in the tourism sector, or 2.1 % of total employment
- **Surf Coast Shire** - 792 jobs in the tourism sector, or 13.3 % of total employment
- **Corangamite Shire** - 325 jobs in the tourism sector, or 4.5 % of total employment
- **Borough of Queenscliffe** - 226 jobs in the tourism sector, or 17.4 % of total employment
- **City of Greater Geelong** - 3,355 jobs in the tourism sector, or 4.5 % of total employment
- **Warrnambool City** - 930 jobs in the tourism sector, or 7.0 % of total employment
- **Glenelg Shire** - 401 jobs in the tourism sector, or 5.1 % of total employment
- **Colac Otway Shire** - 643 jobs in the tourism sector, or 7.4 % of total employment

The tourism sector in the Great Ocean Road is estimated to generate $1.145 Billion in annual economic output. The industries contributing most to the Great Ocean Road’s tourism sector are those that are the greatest beneficiaries of expenditure by visitors. On average, for each dollar spent by a visitor to the Great Ocean Road $0.42 is for accommodation & food services, $0.13 for transport and $0.13 for retail trade.

For every dollar of direct expenditure by visitors to the Great Ocean Road, the broader local economy is estimated to benefit by a further $0.84 once flow-on industrial and consumption effects are taken into consideration. This can also be expressed as a tourism output multiplier of 1.84.

An important finding in the report is that industry sectors benefiting from visitor expenditure include ‘financial & insurance services’ and ‘professional, scientific & technical services’, despite these sectors not typically having any direct connection to tourists. This highlights the fact that the region’s economy is an interconnected system where direct benefits to one industry will ripple to the economy to impact on all sectors to varying degrees.

Applying the tourism industry multiplier of 1.842 to the total output generated by the Great Ocean Road’s tourism sector of $1.145 Billion, the total value (direct + indirect + consumption) of tourism to the region’s economy is estimated at up to $2.109 Billion. This economic output is estimated to support 10,794 jobs in the region.
2. Introduction

2.1 Background

2.2 Purpose and Aim
This report has been prepared for Regional Development Australia as part of the Great Ocean Road Tourism Destination Management Plan 2011, with the aim of detailing the benefits of tourism for the Great Ocean Road and for each of the Local Government Areas (LGAs) in the region.

2.3 Intended Outcomes
This report will detail the unique structure of tourism for the Great Ocean Road Region, and for each of the individual LGAs in the region. The report will examine the contribution made to the Great Ocean Road Region by the various industry sectors that comprise the tourism industry and will highlight the importance of the tourism industry to the region.

2.4 Scope of Work
This report examines the role and contributions of tourism to the economy of the each of the LGAs in the Great Ocean Road region and of the region as a whole. Tourism is viewed in terms of an amalgam of activities such as retail, accommodation, cafes & restaurants, and cultural & recreational services, and is unique to each region. Visitation encompasses all people spending money in the region who do not usually live or work in the region. This includes both Australians and overseas visitors. This visitation includes recreational tourism, people visiting friends and relatives, business travellers and also people visiting to access services such as retail, health, education and government services.

2.5 Methodology
REPLAN models are built on the latest available datasets sourced from the Australian Bureau of Statistics (ABS) and Tourism Research Australia (TRA). The underlying ABS and TRA datasets used are:

- ABS, Journey to Work data from the 2006 Census of Population and Housing
- ABS, 2006/2007, ABS, National Input/Output Tables
- ABS, June 2010 estimates of Victoria’s Gross State Product
- ABS, 2010, Tourism Satellite Account
- 2009/2010, Tourism Research Australia, Regional Tourism Profiles; Western region and Geelong region

These datasets have been used to build REPLAN Tourism datasets, detailing the economic contributions of Tourism alongside estimates for other industry sectors for the Great Ocean Road region.

Under the methodological approach applied in this report the economic contributions of the tourism sector are determined by the number of local tourism related jobs as a proportion of the total tourism related jobs across the country. Therefore, the greater the number of local jobs in tourism intensive sectors such as accommodation, the greater the estimate of the region’s tourism product output, and the greater the region’s proportionate contribution to Australia’s tourism product output.

The estimate of the Great Ocean Road’s tourism product output, added to that of all other regions across the nation, in total equals the latest estimate of Australia’s tourism product output from the Australian Bureau of Statistics’ Tourism Satellite Account.

It is important to note that most tourism analysis undertaken in the past relied upon Tourism Research Australia estimates of average visitor expenditure for the region multiplied by the estimated number of visitors to the area. This approach can in some circumstances lead to anomalies such as over estimating the value of tourism output relative to the output associated with servicing demand for goods and services by local people. The employment based approach applied in this report removes the potential for such anomalies to arise as the number tourism jobs in an area is always a sub-component of the overall level of employment.

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1 As per Tourism Research Australia’s definition of tourism related visitation.
2.6 Region Definition

The economic impact analysis has been undertaken in the context of the Great Ocean Road Region, defined by the combined LGA boundaries of Surf Coast (S), Greater Geelong (C), Colac-Otway (S), Queenscliffe (B), Corangamite (S), Warrnambool (C), Moyne (S), Glenelg (S) and Golden Plains (S).

3. Tourism – The Great Ocean Road Region

Tourism is an amalgam of activities. Figure 3-1 presents estimates of the proportion of industry sector employment that is servicing demand from visitors to the Great Ocean Road Region. The remainder is the estimated proportion of employment attributable to servicing demand from local businesses and consumers.

In total, the Great Ocean Road economy supports 126,404 jobs\(^2\). The accommodation & food services sector employs 9,235 people, of which it is estimated that 3,693 people (39.9 percent, depicted in gold above) are employed to service demand for goods and services from visitors to the Great Ocean Road.

In Figure 3-2 below the ‘gold’ tourism component of Figure 3-1 is presented separately.

\(^2\) Australian Bureau Statistics 2006 Census
In total, it is estimated that the tourism sector in the Great Ocean Road employs 7,098 people; 3,693 people in accommodation & food services, 1,483 people in retail trade and 510 people in transport. Tourism sector jobs represent 5.6 percent of total employment in the region. The map below highlights concentrations of tourism jobs.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Number of Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>3,090</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>1,403</td>
</tr>
<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td>510</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>690</td>
</tr>
<tr>
<td>Arts &amp; Recreation Services</td>
<td>272</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>173</td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td>127</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>113</td>
</tr>
<tr>
<td>Other Services</td>
<td>46</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>35</td>
</tr>
<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
<td>44</td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>29</td>
</tr>
<tr>
<td>Information Media &amp; Telecommunications</td>
<td>20</td>
</tr>
<tr>
<td>Ownership of Dwellings</td>
<td>5</td>
</tr>
<tr>
<td>Financial &amp; Insurance Services</td>
<td>5</td>
</tr>
<tr>
<td>Mining</td>
<td>0</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>0</td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Post Services</td>
<td>0</td>
</tr>
<tr>
<td>Public Administration &amp; Security</td>
<td>0</td>
</tr>
<tr>
<td>Construction</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: REMPLAN Tourism Analysis Module, July 2011

Accommodation is a central component of tourism. From figure 3-3 concentrations of tourism and accommodation employment have been identified in the following locations:

- Anglesea (60 Accommodation jobs)
- Apollo Bay (109 Accommodation jobs)
- Colac (45 Accommodation jobs)
- Geelong CBD (117 Accommodation jobs)
- Lorne (160 Accommodation jobs)
- Barwon Heads / Ocean Grove (66 Accommodation jobs)
- Point Lonsdale / Queenscliffe (107 Accommodation jobs)
- Portland (101 Accommodation jobs)
- Port Arlington (101 Accommodation jobs)
- Port Fairy (96 Accommodation jobs)
- Torquay / Jan Juc (48 Accommodation jobs)
- Warrnambool (256 Accommodation jobs)

The accommodation sector employment figures are based on the Australian Bureau of Statistics place of work employment data from the 2006 Census and provide insights regarding the degree to which the respective localities attract and service visitors.

Across the Great Ocean Road the tourism sector is estimated to employ 7,098 people, which represents 5.6 percent of total jobs. The relative economic contribution of tourism varies significantly across the region's local government areas.
Of total employment in Surf Coast (S) of 5,939 jobs, tourism contributes 792 jobs, or 13%.

Of total employment in Greater Geelong (C) of 74,177 jobs, tourism contributes 3,355 jobs, or 4.5%.

Of total employment in Colac-Otway (S) of 8,639 jobs, tourism contributes 643 jobs, or 7.4%.

Of total employment in Queenscliffe (B) of 1,296 jobs, tourism contributes 226 jobs, or 17.4%.
Great Ocean Road – Tourism Economic Impact Analysis

Figure 3-8 Corangamite (S)

- Agriculture, Forestry & Fishing: 268 jobs
- Health Care & Social Assistance: 229 jobs
- Retail Trade: 273 jobs
- Manufacturing: 373 jobs
- Construction: 160 jobs
- Education & Training: 465 jobs
- Tourism: 482 jobs
- Wholesale Trade: 123 jobs
- Transport, Postal & Warehousing: 144 jobs
- Public Administration & Safety: 196 jobs
- Other Services: 196 jobs
- Accommodation & Food Services: 240 jobs
- Professional, Scientific & Technical Services: 117 jobs
- Administrative & Support Services: 147 jobs
- Mining: 79 jobs
- Financial & Insurance Services: 25 jobs
- Electricity, Gas, Water & Waste Services: 24 jobs
- Information Media & Telecommunications: 26 jobs
- Other Services: 26 jobs

Ownership of Dwellings: 2,463

Of total employment in Corangamite (S) of 7,160 jobs, tourism contributes 325 jobs, or 4.5 %.

Figure 3-9 Warrnambool (C)

- Agriculture, Forestry & Fishing: 466 jobs
- Health Care & Social Assistance: 393 jobs
- Retail Trade: 650 jobs
- Manufacturing: 373 jobs
- Construction: 160 jobs
- Education & Training: 465 jobs
- Tourism: 482 jobs
- Wholesale Trade: 123 jobs
- Transport, Postal & Warehousing: 144 jobs
- Public Administration & Safety: 196 jobs
- Other Services: 196 jobs
- Accommodation & Food Services: 240 jobs
- Professional, Scientific & Technical Services: 117 jobs
- Administrative & Support Services: 147 jobs
- Mining: 79 jobs
- Financial & Insurance Services: 25 jobs
- Electricity, Gas, Water & Waste Services: 24 jobs
- Information Media & Telecommunications: 26 jobs
- Other Services: 26 jobs

Ownership of Dwellings: 1,031

Of total employment in Warrnambool (C) of 13,380 jobs, tourism contributes 930 jobs, or 7.0 %.

Figure 3-10 Moyne (S)

- Agriculture, Forestry & Fishing: 1,011 jobs
- Manufacturing: 1,336 jobs
- Retail Trade: 277 jobs
- Tourism: 277 jobs
- Health Care & Social Assistance: 277 jobs
- Construction: 277 jobs
- Education & Training: 216 jobs
- Transport, Postal & Warehousing: 214 jobs
- Public Administration & Safety: 180 jobs
- Accommodation & Food Services: 181 jobs
- Wholesale Trade: 185 jobs
- Other Services: 187 jobs
- Professional, Scientific & Technical Services: 27 jobs
- Administrative & Support Services: 48 jobs
- Arts & Recreation Services: 65 jobs
- Financial & Insurance Services: 60 jobs
- Electricity, Gas, Water & Waste Services: 24 jobs
- Information Media & Telecommunications: 14 jobs
- Other Services: 12 jobs
- Public Administration & Safety: 7 jobs
- Transport, Postal & Warehousing: 5 jobs
- Wholesale Trade: 5 jobs
- Construction: 5 jobs
- Education & Training: 5 jobs
- Health Care & Social Assistance: 5 jobs
- Mining: 5 jobs
- Tourism: 5 jobs
- Other Services: 5 jobs

Ownership of Dwellings: 1,199

Of total employment in Moyne (S) of 5,645 jobs, tourism contributes 277 jobs, or 4.9 %.

Figure 3-11 Glenelg (S)

- Agriculture, Forestry & Fishing: 830 jobs
- Manufacturing: 510 jobs
- Retail Trade: 192 jobs
- Tourism: 192 jobs
- Health Care & Social Assistance: 192 jobs
- Construction: 192 jobs
- Education & Training: 192 jobs
- Public Administration & Safety: 192 jobs
- Other Services: 192 jobs
- Accommodation & Food Services: 192 jobs
- Professional, Scientific & Technical Services: 192 jobs
- Administrative & Support Services: 192 jobs
- Wholesale Trade: 192 jobs
- Financial & Insurance Services: 192 jobs
- Electricity, Gas, Water & Waste Services: 192 jobs
- Information Media & Telecommunications: 192 jobs
- Other Services: 192 jobs
- Mining: 13 jobs
- Agriculture, Forestry & Fishing: 13 jobs
- Mining: 13 jobs
- Health Care & Social Assistance: 13 jobs
- Construction: 13 jobs
- Education & Training: 13 jobs
- Public Administration & Safety: 13 jobs
- Other Services: 13 jobs
- Accommodation & Food Services: 13 jobs
- Professional, Scientific & Technical Services: 13 jobs
- Administrative & Support Services: 13 jobs
- Wholesale Trade: 13 jobs
- Financial & Insurance Services: 13 jobs
- Electricity, Gas, Water & Waste Services: 13 jobs
- Information Media & Telecommunications: 13 jobs
- Other Services: 13 jobs
- Mining: 13 jobs
- Agriculture, Forestry & Fishing: 13 jobs
- Mining: 13 jobs
- Health Care & Social Assistance: 13 jobs
- Construction: 13 jobs
- Education & Training: 13 jobs
- Public Administration & Safety: 13 jobs
- Other Services: 13 jobs
- Accommodation & Food Services: 13 jobs
- Professional, Scientific & Technical Services: 13 jobs
- Administrative & Support Services: 13 jobs
- Wholesale Trade: 13 jobs
- Financial & Insurance Services: 13 jobs
- Electricity, Gas, Water & Waste Services: 13 jobs
- Information Media & Telecommunications: 13 jobs
- Other Services: 13 jobs
- Mining: 13 jobs

Ownership of Dwellings: 830

Of total employment in Glenelg (S) of 7,864 jobs, tourism contributes 401 jobs, or 5.1 %.
The 7,098 people employed in tourism across the Great Ocean Road are estimated to generate over $1 Billion in direct economic output.

The tourism sector in the Great Ocean Road is estimated to generate $1.148 Billion in direct annual economic output. The industries contributing to the Great Ocean Road’s tourism sector are detailed in Figure 3-5 below.

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income. The output generated to service demand from visitors for each industry sector has been estimated through applying industry profiles from the Australian Bureau of Statistics Tourism Satellite Account and consolidated into a separate tourism sector, shown highlighted in gold in the graph.
Great Ocean Road – Tourism Economic Impact Analysis

Figure 3-15 Output Attributable to Tourism ($ Million)

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Output Attributable to Tourism ($ Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>$77.3</td>
</tr>
<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td>$145.7</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>$148.1</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>$99.0</td>
</tr>
<tr>
<td>Ownership of Dwellings</td>
<td>$66.4</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>$66.1</td>
</tr>
<tr>
<td>Arts &amp; Recreation Services</td>
<td>$64.6</td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td>$28.3</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>$22.1</td>
</tr>
<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
<td>$19.4</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>$15.9</td>
</tr>
<tr>
<td>Information Media &amp; Telecommunications</td>
<td>$11.1</td>
</tr>
<tr>
<td>Other Services</td>
<td>$3.3</td>
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<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>$5.7</td>
</tr>
<tr>
<td>Financial &amp; Insurance Services</td>
<td>$1.6</td>
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<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>$0.0</td>
</tr>
<tr>
<td>Construction</td>
<td>$0.0</td>
</tr>
<tr>
<td>Mining</td>
<td>$0.0</td>
</tr>
<tr>
<td>Public Administration &amp; Safety</td>
<td>$0.0</td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>$0.0</td>
</tr>
</tbody>
</table>

Source: REMPLAN Tourism Analysis Module, July 2011

Of the Great Ocean Road’s total tourism sector output of $1.148 Billion, it is estimated that $477.0 Million is contributed by the accommodation & food services sector.

Great Ocean Road – Tourism Economic Impact Analysis

The 7,098 people employed in tourism are estimated to receive $295.1 Million in wages & salaries.

Figure 3-16 Tourism Wages & Salaries ($ Million)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Wages &amp; Salaries ($ Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>$1,155.0</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>$478.1</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>$366.0</td>
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<tr>
<td>Retail Trade</td>
<td>$152.2</td>
</tr>
<tr>
<td>Public Administration &amp; Safety</td>
<td>$181.2</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>$89.3</td>
</tr>
<tr>
<td>Financial &amp; Insurance Services</td>
<td>$82.3</td>
</tr>
<tr>
<td>Construction</td>
<td>$68.9</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>$58.5</td>
</tr>
<tr>
<td>Tourism</td>
<td>$73.5</td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td>$28.3</td>
</tr>
<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td>$20.6</td>
</tr>
<tr>
<td>Other Services</td>
<td>$12.0</td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>$19.5</td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>$19.3</td>
</tr>
<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
<td>$11.8</td>
</tr>
<tr>
<td>Information Media &amp; Telecommunications</td>
<td>$9.1</td>
</tr>
<tr>
<td>Arts &amp; Recreation Services</td>
<td>$5.0</td>
</tr>
<tr>
<td>Mining</td>
<td>$1.0</td>
</tr>
<tr>
<td>Ownership of Dwellings</td>
<td>$0.0</td>
</tr>
</tbody>
</table>

Source: REMPLAN Tourism Analysis Module, July 2011

Of the $295.1 Million in wages & salaries paid to tourism sector workers a proportionate is anticipated to be used for consumption, and a proportion of this consumption is expected to be captured within the Great Ocean Road economy.
As presented above, the Great Ocean Road’s tourism sector is estimated to generate $1.148 Billion in annual economic output. Output is a measure of gross revenue which includes all the intermediate goods and services required by sectors such as accommodation & food services as inputs into production. When these local and imported inputs into production are subtracted from output the remainder is referred to as the value-added. That is, the value that has been added once the costs and the goods and services sold are removed. The total value added by tourism in the Great Ocean Road is estimated at $535.0 Million.

Figure 3.17 Tourism Value-Added ($ Million)

Value-added represents the contributions that industries make to the Great Ocean Road Region’s Gross Regional Product (GRP)\(^4\), which is estimated at $17.014 Billion.

\(^4\)GRP is the net measure of wealth generated by the region. GRP can be measured by using the incomes approach, where all incomes earned by individuals (wages and salaries), firms (gross operating surplus) and governments (taxes on products or services) are added. Alternatively an expenditure approach can be taken where all forms of final expenditure, including consumption by households, consumption by governments, additions or increases to assets (minus disposals) and exports (minus imports), are added. The expenditure approach does not include intermediate expenditure, as this would lead to double counting, e.g. the wheat and flour in a loaf of bread. These methodological approaches are the same as those used to calculate Gross Domestic Product (GDP) at a national level.

### 4. Tourism Sector Supply Chains

The tourism sector in the Great Ocean Road is estimated to generate $1.148 Billion in annual economic output. The industries contributing most to the Great Ocean Road’s tourism sector are those that are the greatest beneficiaries of expenditure by visitors. The breakdown of tourism output presented in Figure 3.5 above can be expressed as one dollar of visitor expenditure.

Figure 4.1 Distribution of each $1 spent by a visitor - Great Ocean Road

On average, for each dollar spent by a visitor to the Great Ocean Road $0.42 is for accommodation & food services, $0.13 for transport and $0.13 for retail trade. The data provides the basis for understanding the likely direct benefits for the Great Ocean Road economy should visitation and the associated expenditure increase.

Under an increased visitor expenditure scenario it is anticipated that indirect or flow-on benefits would also be realised in the region’s economy. Increased visitation would boost the revenue generated by tourism related business, which would increase their demand for intermediate goods and services, some of which are likely to be sourced locally. The flow-on benefits associated with purchases of local intermediate goods and services are referred to as industrial effects.
Increased demand for local goods and services by visitors would typically correspond to job creation and the payment of additional wages and salaries, delivering further consumption related benefits for the region’s economy. The likely direct and flow-on benefits for the Great Ocean Road economy of an additional $1 Million in visitor expenditure are detailed below.

<table>
<thead>
<tr>
<th>Output</th>
<th>Direct Effect ($M)</th>
<th>Industrial Consumption Effect ($M)</th>
<th>Total ($M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>0.010</td>
<td>0.026</td>
<td>0.044</td>
</tr>
<tr>
<td>Mining</td>
<td>0.004</td>
<td>0.001</td>
<td>0.005</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>0.090</td>
<td>0.116</td>
<td>0.270</td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>0.013</td>
<td>0.008</td>
<td>0.021</td>
</tr>
<tr>
<td>Construction</td>
<td>0.021</td>
<td>0.006</td>
<td>0.026</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>0.020</td>
<td>0.020</td>
<td>0.069</td>
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<td>0.073</td>
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<tr>
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<td>0.002</td>
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<td>0.027</td>
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<td>0.049</td>
</tr>
<tr>
<td>Other Services</td>
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<td>0.014</td>
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</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1.000</td>
<td>0.460</td>
<td>1.842</td>
</tr>
</tbody>
</table>

Source: REMPLAN

For $1 Million of direct expenditure by visitors to the Great Ocean Road, the broader local economy is estimated to benefit by a further $0.842 Million once flow-on industrial and consumption effects are taken into consideration. The total benefit for the region’s economy under this scenario would be $1.842 and so for each dollar spent by a visitor the broader economy is estimated to benefit by a further $0.84. This can also be expressed as a tourism output multiplier of 1.842. It is important to note that the multiplier also represents the likely indirect negative impacts for the economy should tourism activity contract.

Industry sectors benefiting from visitor expenditure in Figure 3-19 include ‘financial & insurance services’ and ‘professional, scientific & technical services’, despite these sectors not typically having any direct connection to tourists. This highlights the fact that the region’s economy is an interconnected system where direct benefits to one industry will ripple to the economy to impact on all sectors to varying degrees.

Applying the tourism industry multiplier of 1.842 to the total output generated by the Great Ocean Road’s tourism sector of $1.145 Billion, the total value (direct + industrial + consumption) of tourism to the region’s economy is estimated at up to $2.109 Billion. This economic output is estimated to support 10,794 jobs in the region.
5. Event Impact Analysis

Section 4 details how visitors to the Great Ocean Road spend their money and how this expenditure is likely to flow through the economy to benefit other industry sectors. The key question remaining is how much are visitors to an event likely to spend.

This information can be captured via visitor surveys or sourced from previous studies undertaken in relation to similar events. Tourism Research Australia’s Regional Tourism profiles also provide broad guidance regarding expenditure by visitor type.

Figure 5-1 Visitor Expenditure Profile

<table>
<thead>
<tr>
<th></th>
<th>Domestic Day</th>
<th>Domestic Overnight</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Stay (nights)</td>
<td>-</td>
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<td>8</td>
</tr>
<tr>
<td>Average Spend per trip ($)</td>
<td>$85</td>
<td>$434</td>
<td>$640</td>
</tr>
<tr>
<td>Average Spend per night ($)</td>
<td>-</td>
<td>$134</td>
<td>$79</td>
</tr>
</tbody>
</table>

Source: 2009 / 2010, TRA, Regional Tourism Profiles; Western region and Geelong region - weighted average
Authors
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Fiona Dunn

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In the course of our preparation of this report, projections have been prepared on the basis of assumptions and methodology which have been described in the report. It is possible that some of the assumptions underlying the projections may change. Nevertheless, the professional judgement of the members and employees of Urban Enterprise Pty. Ltd. have been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.
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1. Executive Summary

1.1. Overview

Urban Enterprise has been engaged to undertake an experience audit of the Great Ocean Road Region for the purpose of identifying the key priorities for future experience development.

Within this report the experience audit is divided into six local government area precincts, namely: Geelong/Queenscliffe/Golden Plains, Surf Coast, Colac Otway, Corangamite, Warrnambool/Moyne and Glenelg. The audit examines experiences based on the following categories:

- food and wine;
- history and heritage;
- nature based/adventure/walking;
- indigenous culture;
- wildlife;
- shopping; and
- events

In addition to this, the information has been matched with the key international and domestic experience seeker markets and this information has been used to highlight gaps in the experience offer and potential experience opportunities.

1.2. What is an Experience Seeker?

This report looks at the domestic and international experience seeker markets. Tourism Australia has identified this market as a key, high yielding market for Australia and represents up to 50% of potential long distance travellers leaving from Australia's key inbound markets.

Experience seekers are frequent travellers that are looking to involve themselves in the culture of the destination and connect with the local people. They want to challenge themselves and actively participate and experience life from the local's perspective.

Experience seekers have preference for the following activities:

1. Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key inbound markets.
2. Nature based experience. This is the second most common preference for experience seekers from all inbound markets and is a key preference for all markets identified except Japan.
3. Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.
4. Festivals and events. German, British and American experience seekers had a preference for attending festivals and events.
5. Walking experience. German and American experience seekers had a preference for a walking experience; however this was not matched by other markets.
1.3. EXPERIENCE AUDIT

The experience audit undertaken for this project highlights the strong presence of nature based, adventure and walking experiences and in particular activities that can be undertaken along the coast. These experience strengths spread across all six precincts. The iconic walking experience is the Great Ocean Walk; however there are numerous other coastal and inland walks throughout the region’s parks that are prominent.

Cycling, including road and mountain biking is a growing experience in the region which links to the coastal and rural hinterland environment.

Water based experiences are strong across the region; however the opportunity to participate in organised tours or hire equipment does vary across the precincts.

Food and Wine experiences feature heavily in the region with Geelong, Queenscliffe, Golden Plains and Surf Coast featuring the most diverse food and wine experiences. The Geelong Wine Region is a well-developed presence in the eastern part of the Great Ocean Road, supported by various dining experiences. There are some emerging nodes outside of the eastern Great Ocean Road precincts, including the Timboon hinterland area which features the 12 Apostles Gourmet Food Trail and the Otway Harvest Trail which extends from the Surf Coast through to the Otways hinterland.

The abundance of fresh seafood is also a clear regional strength, with mussels, abalone, rock lobster, crayfish, Portland bay bugs and salmon all present.

Festivals and Events have a very strong presence due to the number of established and well known music festivals within the region. Sports and nature based events are also growing in strength and participation.

The key themes with regards to History and Heritage are maritime based history, military history, surfing culture and the history of the Great Ocean Road.

All precincts within the Great Ocean Road Region offer wildlife experiences, with whale watching being a unique regional strength. There are also seal and dolphin watching and Australian fauna experiences on offer.

The highlight of the Touring experience offer within the region is undoubtedly touring along the Great Ocean Road which spans several precincts within the region.

Indigenous experiences are limited and largely undeveloped; the two developed experiences include Tower Hill Reserve, Warrnambool and Narana Creations, Geelong.

The strengths associated with golfing experiences across the region lie in the impressive scenery and views.

1.4. POTENTIAL EXPERIENCE OPPORTUNITIES

Analysis of the existing experiences within the Great Ocean Road and information sourced from the product audit has identified potential experience opportunities, which build on existing undeveloped infrastructure or may require new infrastructure for delivery. Consultation with the tourism industry has assisted in identifying experience opportunities.

FOOD & WINE

Whilst it is acknowledged that food and wine experiences are not considered a primary experience strength by Tourism Victoria, there is a wealth of quality regional produce available within the region. A number of opportunities have been identified to strengthen both access to this quality produce and to create unique dining and food touring experiences which take advantage of the unique setting of the Great Ocean Road Region.

Experience opportunities have been identified to enable visitors to access fresh local seafood both within casual and more formal dining settings. This has the potential to help develop the region’s reputation for fresh seafood.

Another experience opportunity is the development and strengthening of the Bellarine Taste Trail, the 12 Apostles Gourmet Food Trail and the Otway Harvest Trail, which extends from the Surf Coast through to the Otways hinterland. Although all three trails are at different stages of development, there are opportunities to diversify the mix of producers in order to effectively showcase the regional produce strengths, as well as build recognition or the trails.

There is further opportunity to develop signature dining experiences across the region which harness the wealth of regional produce and which are set within unique wilderness or waterfront locations.

HISTORY & HERITAGE

History and heritage experience opportunities within the region relate to the themes of surfing culture and history, maritime history, military history and the history of the Great Ocean Road.
There are distinct opportunities to enhance the existing offering through additional interpretation and to explore touring to link destinations.

**NATURE BASED/ADVENTURE/WALKING**

Undoubtedly adventure and nature based experiences are the core strength driving visitation to the region. A number of opportunities have been identified to enhance this reputation and provide additional incentive for visitors to spend more time in the region.

The development of accommodation within a unique wilderness setting, as well as development along the precincts two iconic walks, the Great Ocean Walk and the Great South West Walk also feature as opportunities.

**WATER BASED**

There is significant opportunity to develop additional organised water based tours, opportunities to hire vessels to explore the water as well as diving, surfing and off shore fishing adventures which would undoubtedly lead to an increase in stay within the region.

**INDIGENOUS**

Although there are not a significant number of indigenous cultural experiences within the region, there are opportunities to bring life to the indigenous story through developing interpretation at key sites as well as providing small touring opportunities.

One of the priority projects identified within the Product Gap Audit was the Lake Conda/Budj Bim National Heritage Landscape project which has the potential to become an iconic indigenous site. As such, there is the potential to create additional touring experiences which leverage from this significant heritage site.

**WILDLIFE**

Wildlife experience development centres around enabling more active participation through small touring opportunities and the creation of unique experiences bringing the wildlife closer to the visitor with increased levels of interpretation. The most significant opportunity relates to developing whale watching tours along the coast, similar to Kaikoura in New Zealand.

**EVENTS**

Strengthening an already impressive list of events and festivals within the region is at the core of the opportunities within the region. In particular, events which build on the food and wine and nature based strengths of the region.

**INITIAL RECOMMENDATIONS**

It is recommended that a number of themed strategic plans be developed for the Great Ocean Road Region that will strengthen and develop the experience opportunities. There has been significant regional strategic studies already undertaken to strengthen nature based tourism, through work undertaken by Parks Victoria, Tourism Victoria and the Department of Sustainability and Environment, however a number of the other experiential strengths of the region have had limited regional strategic planning and prioritisation.

Specifically themed strategic plans should be developed across the Great Ocean Road Region for:

- Seafood;
- Wildlife;
- Maritime heritage;
- Diving;
- Events;
- Luxury traveller market plan;
- Indigenous.

Section 8 provides further detail on these initiatives.
2. **INTRODUCTION**

2.1. **PROJECT BACKGROUND**

Urban Enterprise has been engaged to undertake an experience audit for the Great Ocean Road. This project builds upon the product and infrastructure audit undertaken by Urban Enterprise for the Great Ocean Road Region on behalf of the Department of Resources, Energy and Tourism.

The purpose of this study is to undertake an extensive experience audit across the Great Ocean Road Region as well as examine the experience opportunities that exist to enhance this offering. The study will be focusing on strengths within precincts as well as the entire region, as well as by experience type. The market for these strengths will be analysing according to the Experience Seeker Segments as defined by Tourism Australia and the Roy Morgan Value Segments.

2.2. **THE GREAT OCEAN ROAD REGION**

The Great Ocean Road Region is one of the largest tourism regions in Victoria. It is located in Victoria’s south west and includes the core tourism experiences centred around the Great Ocean Road: The 12 Apostles, Bells Beach, Great Ocean Walk, Geelong Waterfront and Port Phillip Bay, surfing, outdoor adventure, wildlife viewing, Cape Bridgewater and Maritime History.

There are nine local government municipalities within the Great Ocean Road. For the purpose of this report, the region is divided into six precincts:

- Geelong, Queenscliffe and Golden Plains;
- Surf Coast;
- Colac Otway;
- Corangamite;
- Warrnambool and Moyne; and
- Glenelg.

The precincts of Geelong/Queenscliff/Golden Plains and Warrnambool/Moyne have been referenced together due to their close proximity and the potential to develop tourism experiences across these municipalities.

**FIGURE 1 GREAT OCEAN ROAD REGION**
3. **What Constitutes a Tourism Experience?**

3.1. **What is a Tourism Experience?**

There is much contention about what constitutes a Tourism Experience. Although the term is used in a number of contexts, there has been little work done to determine a widely accepted definition. In essence, the Tourism Experience is different for everyone and subsequently is difficult to limit to a single definition.

3.1.1. **Definitions from Literature**

There are few academic papers that have attempted to define the term Tourism Experience. Figure 2 and Figure 3 are taken from the book *Quality Tourism Experiences* (Jennings and Nickerson, 2006) and both indicate that a ‘travel experience’ begins and ends at home.

It demonstrates that the experience begins during the planning stage. It is for this reason that tourist destinations need to invest in interactive marketing that connects with the tourist. The reflective stage is also of importance. In practical terms, it may be necessary to provide an outlet for visitors to discuss and share their experiences. Reflection can occur whilst on the trip and continue once the visitor has returned home. This makes the experience more meaningful and can allow the visitor to undertake self-actualisation which is considered important in terms of the reflection process.

3.1.2. **Practical Application of the Term**

The term Tourism Experience is used in a number of marketing and development plans. It is seen as key in tourism destination / brand development platform and informs all aspects of marketing and product development.

---

**FIGURE 2 THE TRAVEL EXPERIENCE**

*Original source: Krillon, 1992 (after Clawson, 1963), sourced from Jennings and Nickerson, 2006

**FIGURE 3 THREE PHASES OF THE TRAVEL EXPERIENCE**

*Original source: Craig Smith and French, 1994, sourced from Jennings and Nickerson, 2006

An experience needs to have geographical boundaries to be marketable. Boundaries do not have to be strictly adhered to, but rather a fluid guide that can change to adapt to new tourism products and experiences. An example of this would be the Australia Alps, although it is not bound by state lines or any other geographical areas, it has a clear and varied product and as a result is marketable.
A Tourism Experience is generally made up of a number of different product types for example, a food and wine experience combined with a wildlife experience in a natural area. These can be tailored towards each individual or group. This will ensure that the visitor perceives their experience as unique, a key component in creating a Tourism Experience.

The key component of the Tourism Experience is a connection with their surroundings and a feeling of authenticity which is cultivated differently depending on the individual. The book, The Tourist (Schoken, 1976), who says travellers want to find “a connection between truth, intimacy, and sharing the life behind the scenes”. Some believe that authenticity is synonymous with travel to “pristine natural areas and untrodden villages where native peoples retain traditional values” (Kutay 2002). Tourism Australia generally refers to natural experiences when talking about a ‘tourist experience’ however cultural experiences are also seen as an avenue for a Tourism Experience as the visitor is able to forge a connection with the local people.

The term Tourism Experience, is defined in the Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan 2008-2014 as:

> "Something which provides a physical, emotional, spiritual or intellectual connection with this place and its people. It may or may not be linked with a product and it is priceless. i.e. it doesn't cost the visitor more but it creates the highest levels of satisfaction."

### 3.2. How Are Tourism Experiences Created?

Tourism Experiences should allow for immersion in the local culture, environment and lifestyle while delivering on the preferences of the target market, for example, meeting locals, participating in living heritage, local events and engaging activities such as horse riding, walking, cycling or kayaking.

Tourism Experiences can be created by improving on existing products, for example mountain biking or rail trails are lifted to a new level by providing opportunities to taste and purchase local produce, a ride through a traditional cattle property, and followed by a cup of tea with a mountain cattleman as the sun goes down. Or learn about the Gunditjumara people on a guided tour of Tower Hill surrounded by the abundance of native wildlife and animals, followed by an indigenous inspired meal and overnight accommodation surrounded by the natural environment of Tower Hill.

Larger regions may wish to consider themes or journeys that deliver Tourism Experiences that provide a sense of intimacy with the surrounding area, to prevent the experience form seeming too generic and common.

Visitors are increasingly favouring Tourism Experiences over individual activities. This is most evident in literature surrounding ‘Australia’s National Landscapes’, which promotes holistic tourism experiences based around the natural environment. Providing a point of difference that cannot be replicated and being able to tailor a specific trip to the individual is vital in constructing a Tourism Experience: this means providing visitors to the area with experiences rather than activities.

### 3.3. State Government Plans

A number of strategic plans refer to the tourism experience; however very few go on to explain this term. The term seems to be used in terms of ensuring a diverse product mix and overlap of different market segments; these can be seen in the aims of the following marketing campaigns:

#### 3.3.1. Spa and Well-Being Action Plan 2011–201

This strategy aims to raise awareness of Victoria as a leading spa and wellbeing destination in key interstate markets by differentiating Victoria from other spa and wellbeing destinations. The strategy refers to the spa and wellbeing market as a key component of future tourism marketing strategies as it connects well with other complementary products and experiences to create a holistic wellbeing experience. Food and wine experiences including organic produce and farm gate experiences as well as nature based tourism to which the Great Ocean Walk is referenced. These complementary products linking up to create a greater experience only enhance a region’s offering and increase a visitor’s length of stay.

#### 3.3.2. Nature Based Tourism Strategy 2008–12

Nature-Based Tourism Strategy 2008-12. This strategy aims to build Victoria’s credibility as a nature-based destination by offering a diverse range of natural experiences complemented by sophisticated offerings. The Great Ocean Road is a key component of this strategy and in particular, the potential of the Great Ocean Walk complemented by
quality accommodation. Yet the strategy refers to Victoria lacking a key point of difference. It states that we already have the natural attractions but lack the associated accommodation, amenity and activities in order to set it apart and create a greater experience. The Great Ocean Walk is referenced as having the potential to be one of Australia’s premier walks with the offering of a “high yield, multi day bushwalk with roofed accommodation immersed with the park experience”.

3.3.3. FOOD AND WINE MARKET SEGMENT 2004 – 2007

Food and wine experiences in Victoria allow visitors to participate in a cultural discovery that represents unique regional history, characteristics and flavours.

In Victoria, food and wine tourism experiences include:

- Integrated food and wine experiences with events, arts and culture, touring, business events, adventure, shopping and golf;
- Winery cellar doors and winery tours;
- Experiencing Melbourne’s diverse range of restaurants, cafés and bars;
- Dining in Victoria’s regional restaurants;
- Festivals and events that feature local food and wine;
- Farmers’ markets;
- Agri-tourism activities, such as fruit picking;
- Farm visits (including purchasing produce at the farmgate);
- Factory tours;
- Microbreweries and breweries;
- Cooking schools;
- Purchasing local fare at produce stores;
- Food and wine trails;
- Winery tourism experiences including accommodation, restaurants and activities.

These experiences involve much more than just tasting food and wine, it allows the participants to become a part of the process and provides a unique experience that cannot be replicated at home.

The Great Ocean Road is referred to in this report as having the potential to benefit from a greater focus on dining experiences in particular. This includes delivering on the demand for regional produce including seafood and wine, filling the gap of high profile iconic dining experiences and increasing the quality of waterside dining experiences at Lorne, Apollo Bay, Warrnambool and Portland.

3.4. CONCLUSIONS

Identifying a destination’s key experiences is essential in developing the brand and marketing the destination. Those visitors seeking experiences are active travellers and are looking for authentic interactions, to immerse themselves in the culture and environment and are seeking to connect with and understand the people. They want to challenge themselves and actively participate and experience life from the local’s perspective.

In order to enhance these tourism experiences within a region and appeal to the experience seeker, one key characteristic is the need to provide a suite of diverse and unique experiences that enhance the product offering and provide key points of difference for a region. Another key feature is a diverse range of experiences that link up, interact with one another or create a journey.

Being more likely to explore regional areas, stay longer in a destination and therefore spend more, the experience seeker is a visitor that is highly valuable to any destination. For a developed tourism region such as the Great Ocean Road, there is tremendous opportunity to create an even more compelling experience offer by building on existing products and experiences to create greater regional dispersal and yield; such as nature based and food and wine experiences.
4. WHAT EXPERIENCES ARE THE VISITORS LOOKING FOR?

4.1. OVERVIEW

This section of the report examines the experience preferences of the key international and domestic market segments and then aligning these with the existing experiences within the Great Ocean Road. The information has been analysed with respect to the six key international markets and for the four key Roy Morgan domestic value segments.

4.2. KEY MARKET SEGMENTS

According to the Experience Development Strategies paper, the Experience Seeker is Tourism Australia’s target demographic. Tourism Australia has identified Experience Seekers as its target market which represents up to 50% of possible long haul travellers from Australia’s main inbound markets.

The experience seeker can be defined as a “globe trotter who is seeking authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture”. There are seven key types of Tourism experiences:

- Nature in Australia;
- Aussie Coastal lifestyle;
- Food and Wine;
- Aboriginal Australia;
- Journeys;
- Australian Major Cities; and
- Outback Australia.

Experience seekers are more likely to visit regional areas, stay longer in the region and have a higher than average yield. Personal interaction with natural and cultural values is integral to a high quality visitor experience for this market. The experience seeker is looking for a unique, authentic and personal experience and to feel a connection towards the culture or the land.

This market segment is “generally well educated, worldly, media savvy and marketing wary” The key things that the ‘Experience Seeker’ is looking for in their travel experience includes:

- Authentic personal experiences;
- Social interactions;
- Meeting and interacting with the locals;
- Experiencing something different from their normal day-to-day life;
- Understanding and learning about different lifestyles and cultures;
- Participating in the lifestyle and experiencing it, rather than observing it;
- Challenging themselves - physically, emotionally and/or mentally;
- Visiting authentic destinations that are not necessarily part of the tourist route; and
- Exposure to unique and compelling experiences.

4.2.1. INTERNATIONAL VISITOR MARKETS: TOURISM AUSTRALIA EXPERIENCE SEEKER SEGMENTS

The following table outlines the general experience seeker preferences for the key five international markets identified by Tourism Australia.
### Table 1: International Experience Seeker Preferences

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<th></th>
<th>United Kingdom</th>
<th>China</th>
<th>Germany</th>
<th>United States of America</th>
<th>New Zealand</th>
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<td>✓</td>
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### 4.2.2. Domestic Visitor Segments: Roy Morgan Value Segments

The four Roy Morgan Value Segments included in the following table account for 77% of all domestic visitation in Australia.

### Table 2: Domestic Experience Preferences

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</tr>
<tr>
<td>History &amp; Heritage</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature Based/Adventure/Walking</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Indigenous Culture</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Art &amp; Culture</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.3. KEY MARKETS AND THE GREAT OCEAN ROAD EXPERIENCE

Table 3 looks at the characteristics of an experience seeker matched with a sample of the key experiences within the Great Ocean Road Region, and provides indication that the Experience Seeker’s preferences can be met in the region.

4.4. CONCLUSIONS

There are several key experience seeker preferences which overlap across all of the key origin markets and these include:

**PRIMARY PREFERENCES**

1. Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key inbound markets.

2. Nature based experience. This is the second most common preference for experience seekers from all inbound markets and is a key preference for all markets identified except Japan.

3. Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

**SECONDARY PREFERENCES**

4. Festivals and events. New Zealand, German, British and American experience seekers had a preference for attending festivals and events.

5. Walking experience. German and American experience seekers had a preference for walking experiences; however this was not matched by other markets.

---

**TABLE 3 EXPERIENCE SEEKERS – WHAT THEY ARE LOOKING FOR AND HOW THIS RELATES TO THE GREAT OCEAN ROAD**

<table>
<thead>
<tr>
<th>Experience Seeker Preferences</th>
<th>The Great Ocean Road can offer these experiences (examples)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experience authentic personal experiences which they can talk about</td>
<td>Experience the magnificent Mountain Ash of the Otway Ranges at the Otway Fly</td>
</tr>
<tr>
<td>Interact with and meet locals</td>
<td>Visit one of the many vibrant local markets and villages along the Great Ocean Road</td>
</tr>
<tr>
<td>Experience something different from the daily routine</td>
<td>Koala viewing at Kennett River and Tower Hill</td>
</tr>
<tr>
<td>Understand and learn about different lifestyles and cultures</td>
<td>Learn about Australia’s Maritime history and heritage at Flagstaff Hill Maritime Village, Warrnambool</td>
</tr>
<tr>
<td></td>
<td>Learning about Indigenous heritage and contemporary culture at Narana Creations and Tower Hill</td>
</tr>
<tr>
<td>Participate in the lifestyle and experiencing it, rather than observing it</td>
<td>Dining at seaside villages of the Great Ocean Road - Port Fairy, Port Campbell, Apollo Bay, Lorne</td>
</tr>
<tr>
<td></td>
<td>Experience Australian Rules Football at Kardinia Park</td>
</tr>
<tr>
<td>Challenge themselves - physically, emotionally and/or mentally</td>
<td>Dive shipwrecks at Port Campbell and Queenscliff</td>
</tr>
<tr>
<td></td>
<td>Swim with dolphins and seals on Port Phillip Bay</td>
</tr>
<tr>
<td></td>
<td>Experience the region by foot on the Great Ocean Walk</td>
</tr>
<tr>
<td>Visit authentic destinations that are not necessarily part of the tourist route</td>
<td>See the rare Australian Platypus at Lake Elizabeth</td>
</tr>
<tr>
<td>Be exposed to unique and compelling experiences</td>
<td>Play golf with the kangaroos at Anglesea</td>
</tr>
<tr>
<td></td>
<td>Walk in nature along the breathtaking Great Ocean Walk from Apollo Bay to the 12 Apostles</td>
</tr>
</tbody>
</table>
5. INTERNATIONAL WHOLESALERS

5.1. INTRODUCTION

This section of the report will provide an overview of consultation with international wholesalers and international tourism operators. Telephone interviews were undertaken with international wholesalers as well as with Tourism Victoria’s international department, and focused on gathering their views on the experience and product gaps within the Great Ocean Road region.

5.2. KEY FINDINGS

Discussions indicated that there is a lack of commissionable product available during the trip planning stages in the Great Ocean Road Region. This results in a reduction in time that visitors are in the region, leading to daytrip visits rather than extended overnight stays. With a lack of commissionable product, inbound operators are not inclined to sell, or promote the products.

A key point captured from discussions indicated that there is limited product targeting the luxury market. Given the iconic status of the 12 Apostles and the Great Ocean Road, there is great potential to attract the luxury market to the region with targeted product and experiences. The existing product offer needs to be elevated to a higher level of service and experiential reward and those that deal with the deluxe and luxury markets feel that this sector is missing within the region. Accommodation options to suit this market were cited as a significant gap in this regard.

In regards to perceived food and wine product and experience gaps, several comments were made in regards to quality the lack of local produce within the current offering as well as a lack of iconic, quality dining options. Wildlife touring options were cited as a gap as well as walking tours and indigenous experiences.
### TABLE 4 EXPERIENCE AND PRODUCT GAPS—INTERNATIONAL WHOLESALERS

<table>
<thead>
<tr>
<th>GAPS</th>
<th>North America</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accommodation</strong></td>
<td></td>
<td>There is a distinct lack of upmarket accommodation along the Great Ocean Road. One inbound tour operator mentioned that they did not have anything they could confidently sell knowing it will suit a client who is staying in some of the luxury lodges elsewhere in Australia. The properties they sell are nice but dated and in need of an upgrade. They would be looking for one unique lodge somewhere in the middle of the route. Another gap identified was additional boutique guest houses in Apollo Bay, Port Fairy or in Port Campbell which is an idea stop for overnight and which they think has nothing to offer the luxury market at present.</td>
</tr>
<tr>
<td></td>
<td>• Top end luxury accommodation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Smaller more personalised luxury properties</td>
<td></td>
</tr>
<tr>
<td></td>
<td>•  Accommodation with views.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Port Campbell lacks accommodation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>•  Accommodation with on-site restaurants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>•  Accommodation along the Great Ocean Walk</td>
<td></td>
</tr>
<tr>
<td><strong>Touring</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>North America</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Local touring along the way with guides in a small mini bus format</td>
<td></td>
</tr>
<tr>
<td><strong>Nature Based/Adventure/Walking</strong></td>
<td>North America</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not unique but enjoyable</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>General Observations</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>There are quite a few unique experiences i.e. Great Ocean Walk but not enough awareness Walking tours</td>
<td></td>
</tr>
<tr>
<td><strong>Food &amp; Wine</strong></td>
<td></td>
<td>Major gap in regards to food &amp; wine offering. US in particular- this is a main motive for travelling Better food options especially in Port Campbell, Lorne and Apollo Bay. There are some good options available in Port Fairy and Warrnambool Quality seafood restaurants needed Lack of must dos, no iconic experiences NZ, UK &amp; US markets- food &amp; wine is very important and they seek out these opportunities</td>
</tr>
<tr>
<td>GAPS</td>
<td>Indigenous</td>
<td>General Observations</td>
</tr>
<tr>
<td>------</td>
<td>------------</td>
<td>----------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a lot more that could be done in order to enhance the indigenous experience offer. The US and Italian markets in particular are very interested in these experiences.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Wildlife Experiences</th>
<th>North America</th>
<th>General Observations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No real day excursions they can sell into as a seat in small mini bus</td>
<td>Not aware of any unique wildlife experiences to that region</td>
</tr>
<tr>
<td></td>
<td>Both self-drive and organised tours needed. There are some good tours based out of Melbourne but not particularly focussed on wildlife.</td>
<td></td>
</tr>
</tbody>
</table>
6. **WHAT EXPERIENCES ARE AVAILABLE IN THE GREAT OCEAN ROAD?**

6.1. **INTRODUCTION**

This section identifies the experiential strengths of the region, drawing on existing literature, marketing materials, consultation with Local Government and industry and the product and infrastructure audit.

6.2. **KEY FINDINGS**

Visitor experiences in the Great Ocean Road Region have been identified through a review of existing literature and through consultation with GOR stakeholders. The iconic and unique visitor experiences in the Great Ocean Road Region include:

- Drive the Great Ocean Road;
- View the 12 Apostles;
- Follow the Great Ocean Walk;
- Surf Bells Beach and other pristine Ocean breaks;
- Discover maritime history;
- View Australian wildlife.

The majority of the iconic experiences in the Great Ocean Road Region are centred on nature based tourism. There are a range of other experiences across the region, whilst not iconic, provide the visitor with quality experiences that have scope for further development, these include:

- Food and wine experience including dining at seaside villages and visiting wineries/cellar doors;
- Wildlife viewing including koala viewing at Kennett River, kangaroos, emus and wallaby viewing at Tower Hill State Reserve and whale and seal watching off Portland, Warrnambool and Apollo Bay.

- Heritage and history experience including maritime history along the shipwreck coast such as Flagstaff Hill and surf history in Torquay.
- Events and Festivals: Various well branded and high quality recreation/ nature based events (e.g.: Great Ocean Road marathon, Melbourne to Warrnambool Classic cycling race, Fun4Kids Festival, Australian Rules football at Kardinia Park) and large music events (e.g.: Falls Festival, Port Fairy Folk Festival). In addition to music and nature based events, business events are also prominent in the region, particularly in Geelong and Surf Coast.

These experiences could be further developed through investment in infrastructure and product, leading to the development of new iconic experiences, this includes:

- Cycle the Great Ocean Road;
- Experience the Wild South Ocean by Sea;
- Taste the flavours of the Great Ocean Road;
- Learn about Southern Australian Aboriginal Culture and Settlement;
- Attend a Great Australian Music Event; and
- Attend a Great Australian Sporting Event.
6.3. MARKETED ICONIC EXPERIENCES

Below are some of the key experiences as marketed on the Great Ocean Road website. Must have experiences include:

- The 12 Apostles. Witness the rugged splendour of the famous 12 Apostles, Loch Ard Gorge, the Gibsons Steps, Bay of Martyrs and Bay of Islands, magnificent rock stacks that rise up majestically from the Southern Ocean on Victoria’s dramatic coastline.

- Great Ocean Walk. The Great Ocean Walk, on Victoria’s spectacular west coast, stretches 104kms from the idyllic resort town of Apollo Bay, to the magnificent 12 Apostles.

- Geelong Waterfront. Geelong’s picturesque waterfront is the perfect place to take in the sea air, dine alfresco and enjoy a hive of waterfront activities.

- Surfing. Surf the west coast of Victoria at many beaches throughout the Great Ocean Road region from the famed breaks of Bells Beach, a much-loved icon of Australia’s surf scene where the Rip Curl Pro is held every Easter, to the big right-handers of Blacknose, famous in a big south westerly with a heavy sea, beyond Discovery Bay.

- Outdoor adventure. If you are heading out of doors in the Great Ocean Road, the beautiful beaches are bound to feature. The ocean offers great waves for swimmers and surfers, different vantage points and lucky catches for recreational anglers and has a beautiful backdrop, both in sight and sound, for cycling, horse riding, kayaking, golf and rambling coastal cliff top walks.

- Wildlife viewing. See amazing wildlife in the Great Ocean Road region from whale watching and swimming with dolphins to spotting koalas and the elusive platypus. See kangaroos and koalas up close at the Tower Hill State Game Reserve or wander through Melba Gully to view a large colony of glow worms providing a spectacular light show.

- Great South West Walk. Explore the beautiful limestone galleries of the Princess Margaret Rose Cave in Lower Glenelg National Park. Admire the ocean views at Discovery Bay and see the stunning spring wildflowers blossoming along the magnificent Glenelg River.

- Cape Bridgewater. See some of the highest coastal cliffs in Victoria overlooking the deep blue waters of Bridgewater Bay that stretches in a perfect crescent around the rim of a huge, ancient volcano crater

- Maritime History. Discover the dramatic past of the Great Ocean Road region’s treacherous section of coast that has claimed more than 180 ships in its colourful maritime heritage. Take in spectacular views from historic lighthouses dotted along Victoria’s south west coastline. Flagstaff Hill Maritime Village, Warrnambool, provides a glimpse into the maritime lifestyles and trades of the 1870’s era, the peak of Australia’s maritime heritage.

- Horse Riding. Ride along pristine beaches and take in some of Australia’s most beautiful coastal scenery. Sunset rides are particularly special. Enjoy the exhilarating feeling of galloping along the sand with the wind in your hair or ride along coastal cliff tops in beautiful bushland settings.
6.4. EXPERIENCE AUDIT

The various experience seeker preferences have been presented in the diagrams below against the supply of key experiences offered in the Great Ocean Road region. They have been broken into both experience preferences and six sub-regions which include the following:

- Geelong, Queenscliffe and Golden Plains;
- Surf Coast;
- Colac Otway;
- Corangamite;
- Warrnambool and Moyne; and
- Glenelg.

It should be noted that this list of experiences is not exhaustive. It does however, examine the key experiences which have been drawn from consultation with industry and Local Government, a review of online material and from the previous experience audit undertaken in the region in 2008 by Fresh Projects.
FIGURE 4 GEELONG, QUEENSCLIFFE & GOLDEN PLAINS EXPERIENCE PROFILE

FOOD & WINE
- Wine tasting and dining at the cool climate wineries of Geelong/Bellarine and Moorabool Valley
- Dining at the Geelong waterfront overlooking Corio Bay
- Visit up to 65 local producers along the Bellarine Taste Trail
- Taste fresh mussels from the Portarlington Pier
- Taste fresh local seafood from the Bellarine
- Visit one of the berry farms around Drysdale and Wallington
- Enjoy uninterrupted views across the bay to Geelong and the You Yangs at various Bellarine wineries
- Dine overlooking the Estuary at Barwon Heads
- Dine overlooking Queenscliff Harbour

HISTORY & HERITAGE
- Experience the historic seaside town of Queenscliff and learn about its rich maritime past
- Discover the history of Point Lonsdale and Queenscliff Lighthouses
- Experience Geelong’s historic waterfront and industrial heritage - including Bollards Trail
- Experience National Wool Museum, Ford Discovery Centre and Old Geelong Jail.
- Visit the National Trust Properties in Geelong and Portarlington
- Experience Geelong Art Gallery
- Visit the Queenscliff Maritime Museum

NATURE BASED / ADVENTURE / WALKING
- Horse trail rides through the Bellarine Peninsula
- Dive Southern Port Phillip Bay Marine National Parks including shipwrecks (ex HMAS Canberra)
- Cycle trails in Geelong/Bellarine
- Mountain Biking in the You Yangs Regional Park
- Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff
- Take the ferry journey from Sorrento to Queenscliff

GOLF
- Play courses with spectacular ocean views and coastal scenery, Barwon Heads, 13th Beach and Curlewis

INDIGENOUS
- Learning about Indigenous heritage and contemporary culture at Narana Creations, Geelong
- Experience the William Buckley Trail

ART & CULTURE
- Theatrical performances at The Geelong Performing Arts Centre
- Visit the Geelong Gallery

SHOPPING
- Spend the morning visiting the Geelong, Bannockburn and Bellarine Farmers’ Markets
- Visit Geelong’s major shopping centres (Westfield, Market Square and Warrn Ponds) and strip shopping in Pakington Street Geelong West and High Street Belmont

FESTIVALS & EVENTS
- Attend a conference, exhibition and corporate retreat in Geelong and on the Bellarine.
- Marvel at aircraft new and old at the Australian International Air show, Avalon
- Experience Australian Rules Football at Kardinia Park
- Watching the boats on Corio Bay during Festival of Sail
- Listen to Australia’s best blues, jazz, pop, rock & funk at the Queenscliffe Music and Meredith Festivals
- Watch elite cyclists at the Bay Cycling Classic
- Experience the world’s only Blues Train National Celtic Festival at Portarlington
- Rowing on Barwon River – Head of School Girls and Barwon Regattas
- Experience Geelong’s cool climate wines and regional produce from the Bellarine, Surf Coast and surrounding Moorabool Valley at Toast to the Coast

WILDLIFE
- Swim with dolphins and seals on Port Phillip Bay
- View sting rays in Queenscliff Marine
- View the underwater world from a glass bottom boat at Queenscliff
- Visit Jirrahlinga Koala & Wildlife Sanctuary in Barwon Heads

GEELONG, QUEENSCLIFFE AND GOLDEN PLAINS

GEELONG
- Queenscliff
- Barwon Heads

HISTORY & HERITAGE
- Experience the historic seaside town of Queenscliff and learn about its rich maritime past
- Discover the history of Point Lonsdale and Queenscliff Lighthouses
- Experience Geelong’s historic waterfront and industrial heritage - including Bollards Trail
- Experience National Wool Museum, Ford Discovery Centre and Old Geelong Jail.
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GOLF
- Play courses with spectacular ocean views and coastal scenery, Barwon Heads, 13th Beach and Curlewis

INDIGENOUS
- Learning about Indigenous heritage and contemporary culture at Narana Creations, Geelong
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ART & CULTURE
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SHOPPING
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WILDLIFE
- Swim with dolphins and seals on Port Phillip Bay
- View sting rays in Queenscliff Marine
- View the underwater world from a glass bottom boat at Queenscliff
- Visit Jirrahlinga Koala & Wildlife Sanctuary in Barwon Heads

GEELONG, QUEENSCLIFFE BELLARINE

QUEENSCLIFFE
- Barwon Heads

HISTORY & HERITAGE
- Experience the historic seaside town of Queenscliff and learn about its rich maritime past
- Discover the history of Point Lonsdale and Queenscliff Lighthouses
- Experience Geelong’s historic waterfront and industrial heritage - including Bollards Trail
- Experience National Wool Museum, Ford Discovery Centre and Old Geelong Jail.
- Visit the National Trust Properties in Geelong and Portarlington
- Experience Geelong Art Gallery
- Visit the Queenscliff Maritime Museum

NATURE BASED / ADVENTURE / WALKING
- Horse trail rides through the Bellarine Peninsula
- Dive Southern Port Phillip Bay Marine National Parks including shipwrecks (ex HMAS Canberra)
- Cycle trails in Geelong/Bellarine
- Mountain Biking in the You Yangs Regional Park
- Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff
- Take the ferry journey from Sorrento to Queenscliff

GOLF
- Play courses with spectacular ocean views and coastal scenery, Barwon Heads, 13th Beach and Curlewis

INDIGENOUS
- Learning about Indigenous heritage and contemporary culture at Narana Creations, Geelong
- Experience the William Buckley Trail

ART & CULTURE
- Theatrical performances at The Geelong Performing Arts Centre
- Visit the Geelong Gallery

SHOPPING
- Spend the morning visiting the Geelong, Bannockburn and Bellarine Farmers’ Markets
- Visit Geelong’s major shopping centres (Westfield, Market Square and Warrn Ponds) and strip shopping in Pakington Street Geelong West and High Street Belmont

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WILDLIFE
- Swim with dolphins and seals on Port Phillip Bay
- View sting rays in Queenscliff Marine
- View the underwater world from a glass bottom boat at Queenscliff
- Visit Jirrahlinga Koala & Wildlife Sanctuary in Barwon Heads

GEELONG, QUEENSCLIFFE AND GOLDEN PLAINS

WINE & BEER
- Wine tasting and dining at the cool climate wineries of Geelong/Bellarine and Moorabool Valley
- Dining at the Geelong waterfront overlooking Corio Bay
- Visit up to 65 local producers along the Bellarine Taste Trail
- Taste fresh mussels from the Portarlington Pier
- Taste fresh local seafood from the Bellarine
- Visit one of the berry farms around Drysdale and Wallington
- Enjoy uninterrupted views across the bay to Geelong and the You Yangs at various Bellarine wineries
- Dine overlooking the Estuary at Barwon Heads
- Dine overlooking Queenscliff Harbour

HISTORY & HERITAGE
- Experience the historic seaside town of Queenscliff and learn about its rich maritime past
- Discover the history of Point Lonsdale and Queenscliff Lighthouses
- Experience Geelong’s historic waterfront and industrial heritage - including Bollards Trail
- Experience National Wool Museum, Ford Discovery Centre and Old Geelong Jail.
- Visit the National Trust Properties in Geelong and Portarlington
- Experience Geelong Art Gallery
- Visit the Queenscliff Maritime Museum

NATURE BASED / ADVENTURE / WALKING
- Horse trail rides through the Bellarine Peninsula
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- Cycle trails in Geelong/Bellarine
- Mountain Biking in the You Yangs Regional Park
- Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff
- Take the ferry journey from Sorrento to Queenscliff

GOLF
- Play courses with spectacular ocean views and coastal scenery, Barwon Heads, 13th Beach and Curlewis

INDIGENOUS
- Learning about Indigenous heritage and contemporary culture at Narana Creations, Geelong
- Experience the William Buckley Trail

ART & CULTURE
- Theatrical performances at The Geelong Performing Arts Centre
- Visit the Geelong Gallery

SHOPPING
- Spend the morning visiting the Geelong, Bannockburn and Bellarine Farmers’ Markets
- Visit Geelong’s major shopping centres (Westfield, Market Square and Warrn Ponds) and strip shopping in Pakington Street Geelong West and High Street Belmont

FESTIVALS & EVENTS
- Attend a conference, exhibition and corporate retreat in Geelong and on the Bellarine.
- Marvel at aircraft new and old at the Australian International Air show, Avalon
- Experience Australian Rules Football at Kardinia Park
- Watching the boats on Corio Bay during Festival of Sail
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- Experience the world’s only Blues Train National Celtic Festival at Portarlington
- Rowing on Barwon River – Head of School Girls and Barwon Regattas
- Experience Geelong’s cool climate wines and regional produce from the Bellarine, Surf Coast and surrounding Moorabool Valley at Toast to the Coast

WILDLIFE
- Swim with dolphins and seals on Port Phillip Bay
- View sting rays in Queenscliff Marine
- View the underwater world from a glass bottom boat at Queenscliff
- Visit Jirrahlinga Koala & Wildlife Sanctuary in Barwon Heads
FIGURE 5 SURF COAST EXPERIENCE PROFILE

FOOD & WINE
Dining by the seaside village of Lorne
Taste beautiful produce and mix with the locals at farmers markets
Dine on the beachfront at Lorne
Visit over 30 local producers along the Otway Harvest Trail in the hinterland from the Surf Coast to the Otways

NATURE BASED / ADVENTURE / WALKING
Visit the eight different waterfalls inland from the Surf Coast
Surf renowned surf breaks along the coast, including surf lessons
Take in the sweeping ocean and bush views along the Great Ocean Road
Mountain Bike Riding - Anglesea
Swim and walk along the many beautiful beaches on the coast
Enjoy spectacular coastline, dense bushland, forests and waterfalls along the Surf Coast Walk
Paddle the Anglesea River by kayak or canoe

HISTORY & HERITAGE
Learn about the history of surfing and the role of Torquay as the birthplace of Rip Curl and Quicksilver.
Great Ocean Road Archway/Memorial at Eastern View
Admire the National Trust recognized Barwon Park Mansion, Winchelsea

GOLF
Golf with the Kangaroos at Anglesea
Play courses with spectacular ocean views and coastal scenery

SHOPPING
Shop at the iconic local and international surf labels at Torquay Surf Precinct
Meander through the Great Ocean Road village boutiques

FESTIVALS & EVENTS
Swim the iconic Pier to Pub, Lorne
Experience the iconic Rip Curl Pro, Bells Beach
Listen to world class music over the New Year at the Falls Festival
Challenge yourself in the mountain to surf run
Attempt or support your friends at the Great Ocean Road Marathon (Lorne to Apollo Bay)
Challenge yourself in the Anaconda Adventure Race
Cycle the Great Ocean Road in the Amy Gillett Gran Fondo

SURF COAST
TORQUAY
LORNE
ANGLESEA & AIREYS INLET

ART & CULTURE
Experience the flourishing art scene in galleries and cafes dotted throughout the coastal and hinterland towns.

TOURING
Take a drive and absorb some of the impressive views along the Great Ocean Road

WILDLIFE
See Kangaroos at the Anglesea Golf Course
FIGURE 6 COLAC OTWAY EXPERIENCE PROFILE

**FOOD & WINE**
- Dining by the seaside town of Apollo Bay
- Visit over 30 local producers along the Otway Harvest Trail in the hinterland from the Surf Coast to the Otways
- Taste beautiful produce and mix with the locals at farmers market

**HISTORY & HERITAGE**
- Discover the history of Cape Otway Lightstation
- Learn about the Dinosaur age through fossils at Dinosaur Cove, Cape Otway

**GOLF**
- Play courses with spectacular ocean views and coastal scenery

**TOURING**
- Tour along Turton’s Track
- Take a drive and absorb some of the impressive views along the Great Ocean Road and inland through the Great Otway National Park

**NATURE BASED / ADVENTURE / WALKING**
- Horse trail rides through the Otway Ranges
- Visit spectacular waterfalls and temperate rainforest at Otway National Park
- Experience the magnificent Mountain Ash of the Otway Ranges at the Otway Fly
- Experience the challenging single track Mountain biking at Forrest
- Road cycling along the Great Ocean Road
- Walk in nature along the breathtaking Great Ocean Walk from Apollo Bay to the 12 Apostles
- Surf renowned surf breaks along the coast

**SHOPPING**
- Visit the Apollo Bay Foreshore Farmers’ Market
- Meander through the Great Ocean Road village boutiques

**FESTIVALS & EVENTS**
- Experience the Apollo Bay Music Festival.
- Apollo Bay Sea Food Festival

**WILDLIFE**
- Wild Game fishing charters from Apollo Bay
- Koala viewing at Kennett River
- Kayaking and boating through seal colony at Apollo Bay and Cape Bridgewater
- See the rare Australian Platypus at Lake Elizabeth
- Great Ocean Road Centre for Conservation and Ecology - Tiger Quolls and Koalas
- Enjoy a paddle with the platypuses tour from Lorne or Apollo Bay
- Whale watching right along the coast from Apollo Bay

**INDIGENOUS**
- Learn about the Gadabanud people along the Aboriginal Heritage Trail at Cape Otway Lightstation

**ART & CULTURE**
- Experience the flourishing art scene in galleries and cafes dotted throughout the coastal and hinterland towns.
FIGURE 7 CORANGAMITE EXPERIENCE PROFILE

FOOD & WINE
- Follow the 12 Apostles Gourmet Trail
- Taste beautiful produce and mix with the locals at farmers markets
- Enjoy unique high quality fresh seafood, including Rock Lobsters from Port Campbell
- Taste single malt whisky at the Timboon Railway Shed Distillery

HISTORY & HERITAGE
- Visit local wreck sites and view artefacts and stories about local wrecks and rescues on the Shipwreck Coast Trail
- Explore significant historic buildings, dry stone wall networks and cultured streetscapes around Camperdown and Tëräng.

GOLF
- Play courses with spectacular ocean and lake frontage

TOURING
- Take in the region from the road on one of the many touring routes
- Take a drive and absorb some of the impressive views along the Great Ocean Road

NATURE BASED / ADVENTURE / WALKING
- Discover the dramatic rock sculptures of the 12 Apostles and Loch Ard Gorge
- Walk the Gibsons Steps
- Visit the Bay of Matys and Bay of Islands
- View the 12 Apostles by helicopter or scenic boast trip
- Dive shipwrecks at Port Campbell
- Surf renowned surf breaks along the coast
- Take in the sweeping ocean and bush views along the Great Ocean Road
- Cycle the Coast to Crater rail trail from Camperdown to Timboon
- Visit sites of the Kanawinka Geopark, including crater lakes, Mt Elephant and Mt Widderin Caves
- Take in the spectacular western climax of the Great Ocean Walk
- Join the Port Campbell Discovery Walk

SHOPPING
- Meander through the Great Ocean Road village boutiques

FESTIVALS & EVENTS
- Experience the 1950s at the Camperdown Cruise Rockabilly Festival

WILDLIFE
- Fairy penguin viewing at the 12 Apostles at dusk dawn
- Wildlife viewing at Port Campbell National Park
- View Little Penguins at the 12 Apostles and London Bridge at dusk
- View thousands of Shearwaters returning to roost at Mutton Bird Island (Loch Ard Gorge)
- Take a night walk to view glow worms at Melba Gully State Park
- View kangaroos on the Gellibrand River Estuary
- Interact with native wildlife at the Great Ocean Road Wildlife Park

ART & CULTURE
- Experience a growing art scene in galleries and café’s dotted throughout Corangamite’s northern towns

CORANGAMITE
PORT CAMPBELL
CAMPERDOWN
PRINCETOWN
**FOOD & WINE**
- Sample delicious local cheeses in the Warrnambool area
- Dining at the seaside village of Port Fairy
- Taste beautiful produce and mix with the locals at farmers markets
- Dining at Warrnambool foreshore, with ocean views
- Dine at the late 19th century boathouse, Proudfoots Boathouse on the Hopkins River in Warrnambool
- Have breakfast at the Pavilion on the Warrnambool foreshore whilst watching the race horses train in the surf
- Dining at Warrnambool Foreshore

**HISTORY & HERITAGE**
- Learn about Australia’s Maritime history and heritage at Flagstaff Hill Maritime Village, Warrnambool
- Discover Port Fairy lighthouse and tour through and experience the Shipwreck Coast and learn about failed voyages at sea
- Experience the historic seaside town of Port Fairy
- Port Fairy Heritage Walk

**GOLF**
- Play courses with spectacular ocean views and coastal scenery at Warrnambool and Port Fairy

**TOURING**
- Take a drive and absorb some of the impressive views along the Great Ocean Road

**NATURE BASED / ADVENTURE / WALKING**
- Experience the wild coastal reserves and panoramic views west of Port Fairy
- Surf renowned surf breaks along the coast
- View Warrnambool’s Lady Bay by foot along the Foreshore Promenade
- Walk or cycle along the Warrnambool Promenade Foreshore
- Port Fairy to Warrnambool Rail Trail
- Diving the Southern Ocean

**INDIGENOUS**
- Learning about the Worn Gundidj/Tower Hill Game Reserve

**ART & CULTURE**
- Warrnambool Art Gallery
- Warrnambool Lighthouse Theatre
- Experience the flourishing art scene in galleries and cafes dotted throughout the region.

**SHOPPING**
- Visit Port Fairy Village

**FESTIVALS & EVENTS**
- Experience four days of folk, blues, jazz and country music at the Port Fairy Music Festival
- Experience what life was like in Warrnambool in the 1870’s at Flagstaff Hill’s Shipwrecked Sound and Light Show
- Experience the Fun 4 Kids Festival
- Experience the Australian Horse racing culture at Warrnambool racecourse
- Watch elite cyclists take on the oldest road cycling classic in the world – Melbourne to Warrnambool
- Experience the Warrnambool Speedway Summer Festival

**SHOPPING**
- Visit Port Fairy Village

**WILDLIFE**
- Watch southern right whales from the shoreline at the nursery in Warrnambool.
- Viewing Australian megafauna in their habitat (Kangaroos, Emus and Wallabies) at Tower Hill State Reserve
- View the mutton birds at Griffith Island
**FIGURE 9 GLENELG EXPERIENCE PROFILE**

**FOOD & WINE**
- Visiting cellar doors in the Henty Wine Region
- Taste beautiful produce and mix with the locals at farmers markets
- Pick your own strawberries in Portland

**HISTORY & HERITAGE**
- Explore Portland, Victoria’s oldest European settlement
- Portland’s maritime history at Portland Maritime Discovery Centre, Cape Nelson Lighthouse and the WWII Memorial Lookout
- Take a scenic ride along the foreshore on the Portland Cable Tram

**GOLF**
- Play courses with spectacular ocean views and coastal scenery

**NATURE BASED / ADVENTURE / WALKING**
- Encounter the wilderness on the Great South West Walk
- Wild Game fishing charters from Portland
- Experience the rugged coastline by climbing the Cape Nelson Lighthouse
- Take in the picturesque white sandy beaches at Cape Bridgewater & Discovery Bay Coastal Park
- Surf renowned surf breaks along the coast, including surf lessons
- Take in the sweeping ocean and bush views along GOR
- Visit the blowholes and Petrified Forest near Cape Bridgewater
- Fish for salmon, King George whiting, snapper, mulloway, tailor trevally, garfish and kingfish at Portland

**INDIGENOUS**
- Learning about the Budj Bim National Heritage Landscape and the cool climate Indigenous culture, Lake Condah

**PORTLAND**

**SHOPPING**
- Meander through the Great Ocean Road village boutiques

**GLENELG**

**FESTIVALS & EVENTS**
- Casterton Kelpie Festival
- Portland Upwelling Festival
- Heywood Wood, Wine & Rose Festival

**WILDLIFE**
- Kayaking and boating through seal colony at Cape Bridgewater
- Whale watching from the beach at Portland

**NATURE BASED / ADVENTURE / WALKING**
- Portland Arts Centre
The experience audit undertaken for this project highlights the strong presence of nature based, adventure and walking experiences and in particular activities that can be undertaken along the coast. These experience strengths spread across all six precincts. The iconic walking experience is the Great Ocean Walk; however there are numerous other coastal and inland walks throughout the region’s parks that are prominent.

Cycling, including road and mountain biking is a growing experience in the region which links to the coastal and rural hinterland environment.

Water based experiences are strong across the region, the opportunity to participate in organised tours or hire equipment to actively participate does vary, with each sub region offering differing levels of associated infrastructure.

Food and Wine experiences feature heavily in the region with Geelong, Queenscliffe, Golden Plains and Surf Coast area featuring the most diverse food and wine experiences in the region. The Geelong Wine Region is without doubt a well-developed presence in the eastern part of the Great Ocean Road, supported by various dining experiences.

There are some emerging nodes outside of the eastern Great Ocean Road precincts including the Timboon hinterland area which features the 12 Apostles Gourmet Food Trail and the Otway Harvest Trail which extends from the Surf Coast through to the Otways hinterland.

The abundance of fresh seafood within waters off the coast including mussels, abalone, rock lobster, crayfish, Portland bay bugs and salmon is also a clear regional strength.

Festivals and Event experiences have a very strong presence due to the number of established and well known music festivals within the region. Sports and nature based events are also growing in strength and participation.

The key themes with regards to History and Heritage are maritime based history, military history, surfing culture and the history of the GOR.

All precincts within the Great Ocean Road Region are able to offer wildlife experiences with whale watching being a unique regional strength as well as seal and dolphin watching and Australian marsupials.
7. MATCH BETWEEN KEY INTERNATIONAL AND DOMESTIC MARKETS, EXISTING VISITOR EXPERIENCES & GAPS

7.1. OVERVIEW

This section of the report is a match between the key international and domestic markets and the existing visitor experiences available in the Great Ocean Road. This information has been examined under the following seven key experience types:

- Food and Wine;
- History/Heritage
- Nature Based/Adventure/Walking
- Indigenous Culture
- Wildlife
- Shopping
- Events

Information from the Product Gap Audit has then been used to inform the experience gap analysis in this table. As mentioned previously, this list of experiences is not an exhaustive analysis but a list of the key experiences available.
<table>
<thead>
<tr>
<th>Key Markets</th>
<th>The Great Ocean Road can offer these experiences</th>
<th>Potential experience opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food and Wine</strong></td>
<td><strong>Experiences</strong></td>
<td></td>
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</tbody>
</table>
| **International** | Wine tasting and dining at the cool climate wineries of Geelong/Bellarine and Moonsboul Valley  
Dining at the Geelong waterfront overlooking Corio Bay  
Visit up to 65 local producers along the Bellarine Taste Trail  
Taste fresh mussels from the Portarlington Pier  
Taste fresh local seafood from the Bellarine  
Visit one of the berry farms around Drysdale and Wallington  
Taste beautiful produce and mix with the locals at farmers markets  
Enjoy uninterrupted views across the bay to Geelong and the You Yangs at various Bellarine wineries  
Dine overlooking the Estuary at Barwon Heads  
Dine overlooking Queenscliff Harbour  
Dining by the seaside village of Lorne  
Taste beautiful produce and mix with the locals at farmers markets  
Dine on the beachfront at the Lorne  
Visit over 30 local producers along the Otway Harvest Trail in the hinterland from the Surf Coast to the Otways  
Dining by the seaside town of Apollo Bay  
Taste beautiful produce and mix with the locals at farmers markets  
Follow the 12 Apostles Gourmet Trail along the coast east and west of Port Campbell  
Taste beautiful produce and mix with the locals at farmers markets  
Enjoy unique high quality fresh seafood, including Rock Lobsters from Port Campbell  
Taste single malt whisky at the Timboon Railway Shed Distillery  
Sample delicious local cheeses in the Warrnambool area  
Dining at the seaside village of Port Fairy  
Taste beautiful produce and mix with the locals at farmers markets  
Dining at Warrnambool foreshore, with ocean views  
Dine at the late 19th century boathouse, Proudfoots Boathouse on the Hopkins River in Warrnambool  
Visiting cellar doors in the Henty Wine Region  
Pick your own strawberries in Portland | Purchase fresh seafood from one of the many seafood co-ops along the coast  
Eat freshly caught local seafood, including Portland bay bugs, crayfish, abalone and salmon bought from an outlet on the foreshore at Portland  
Taste freshly caught local seafood at one of the quality seafood restaurants on the coast  
Learn how to cook some of the beautiful fresh seafood sourced straight from the ports on a regional seafood tour and cooking lesson  
Taste regional produce at quality waterfront restaurants along the coast  
Experience world class cuisine in a unique wilderness setting at Moonlight Head and Cape Otway  
Experience world class dining and local wines and produce at Bellarine wineries  
Provide the opportunity to purchase fresh local produce from vibrant local farmers markets dotted right throughout the region  
Join a small tour visiting local producers followed by a cooking lesson;  
Take a tour exploring the Aboriginal Cultural and Food History of the Great Ocean Road. Experience food prepared and based on bush produce seen whilst touring  
Join a day tour from Melbourne visiting the best of the Geelong, Bellarine and Moonsboul wineries and breweries  
Experience the region’s unique wildlife and artisan local produce on a small day tour from Port Campbell to Tower Hill  
Join an exclusive food trail tour to taste fresh produce from the farm gate and purchase local fare at the produce stores in the Timboon region or Harvest Trail  
Spend the afternoon visiting local cheese and butter producers at their farm gate or factory stores in Warrnambool and Camperdown  
Join an organised group tour for breakfast at the 12 Apostles |
| **Domestic**       | Visible Achievement  
Socially Aware  
Traditional Family Life |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
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<th>Key Markets</th>
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</thead>
<tbody>
<tr>
<td><strong>International</strong></td>
<td><strong>USA</strong></td>
<td>Maritime heritage tour including self-drive lighthouse tour and Shipwreck Discovery Trail of the Great Ocean Road, supported by smart phone apps for interpretation</td>
</tr>
<tr>
<td></td>
<td><strong>New Zealand</strong></td>
<td>Learn about the maritime history of the Shipwreck Coast through interactive and interpretive displays at the developed Loch Ard Gorge Interpretive Centre with strong connections to the regional maritime history museum at Flagstaff Hill, Warrnambool</td>
</tr>
<tr>
<td></td>
<td><strong>India</strong></td>
<td>Visit the expanded maritime history museum at Flagstaff Hill which can showcase the full collection of over 12,000 pieces of historical significance</td>
</tr>
<tr>
<td><strong>Domestic</strong></td>
<td><strong>Visible Achievement</strong></td>
<td>Stay overnight at the renovated historic Glenample Homestead just a stone’s throw from the 12 Apostles</td>
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<tr>
<td></td>
<td><strong>Socially Aware</strong></td>
<td></td>
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<tr>
<td></td>
<td><strong>Traditional Family Life</strong></td>
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</tbody>
</table>
## The Great Ocean Road can offer these experiences

- Horse trail rides through the Bellarine Peninsula
- Dive Southern Port Phillip Bay Marine National Parks including shipwrecks (ex HMCS Canberra)
- Cycle trails in Geelong/Bellarine
- Mountain Bikes in the You Yangs Regional Park
- Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff
- Take the ferry journey from Sorrento to Queenscliff
- Visit the eight different waterfalls inland from the Surf Coast
- Surf renowned surf breaks along the coast, including surf lessons
- Take in the sweeping ocean and bush views along the Great Ocean Road
- Mountain Bike Riding - Anglesea
- Swim and walk along the many beautiful beaches on the coast
- Enjoy spectacular coastline, dense bushland, forests and waterfalls along the Surf Coast Walk
- Paddle the Anglesea River by kayak or canoe
- Horse trail rides through the Otway Ranges
- Visit spectacular waterfalls and temperate rainforest at Otway National Park
- Experience the magnificent Mountain Ash of the Otway Ranges at the Otway Fly
- Experience the challenging single track Mountain biking at Forrest
- Road cycling along the Great Ocean Road
- Walk the breathtaking Great Ocean Walk from Apollo Bay to the 12 Apostles
- Discover the dramatic rock sculptures of the 12 Apostles and Loch Ard Gorge
- Walk the Gibsons Steps
- Visit the Bay of Matrys and Bay of Islands
- Viewing the 12 Apostles by helicopter or scenic boat trip
- Dive shipwrecks at Port Campbell
- Take in the sweeping ocean and bush views along the Great Ocean Road
- Cycle the Coast to Crater rail trail from Camperdown to Timboon
- Cycle the rail trail from Port Fairy to Koroi
- Visit Kanawinka Geopark
- Experience the wild coastal reserves and panoramic views west of Port Fairy
- Beach Horse riding at Warrnambool
- View Warrnambool's Lady Bay by foot along the Foreshore Promenade
- Encounter the wilderness on the Great South West Walk
- Wild Game fishing charters from Portland and Apollo Bay
- Experience the rugged coastline by climbing the Cape Nelson Lighthouse
- Take in the picturesque white sandy beaches at Cape Bridgewater & Discovery Bay Coastal Park
- Cycle or walk the Twelve Apostles Trail from Timboon via Port Campbell, Loch Ard Gorge, Gibson Steps and on to the estuary village of Princetown
- Experience the beauty and seclusion of the Great Ocean Walk by day and rest in nature based accommodation by night
- View the mutton birds at Griffith Island

## Potential experience opportunities

- Join a surf fishing tour visiting various beaches and stopping off at one of the quality seafood restaurants or cafes along the way
- Explore the extended network of adventure trails by motorbike, 4WD or horseback
- Join a tour or self cycle along the iconic Great Ocean Road
- Get a taste for the best of the Bellarine Peninsula’s golf courses and regional cuisine on a small organised tour of the region
- Join a horse riding tour in the Bellarine, from Portarlington in the north to Queenscliff in the south
- Join a surf fishing or offshore fishing adventure to catch local specialties such as Portland bay bugs, crayfish, abalone and salmon
- Spend the day sailing round the waters off Apollo Bay
- Dive at a purpose designed dive wreck site off Warrnambool
- Join a sea or estuary kayak tour off Port Campbell or Peterborough
- Join a fast speed jet boat tour out to the 12 Apostles from Port Campbell
- Participate in a guided overnight South West Walk tour, being accommodated off the trail each night
- Spend the night surrounded by nature and wildlife at the permanent camp site at Tower Hill State Game Reserve
- Join a day sailing adventure to Lady Julia Percy Island
- Visit the 12 Apostles and learn about the surrounding area at the Loch Ard Interpretive Centre
- Cycle or walk the scenic Apostles Trail from Timboon to Port Campbell
- Spend the night at a unique wilderness camp, waking up to the sound of wildlife whilst surrounded by the beauty of the natural landscape
- Experience the beauty and seclusion of the Great Ocean Walk by day and rest in nature based accommodation by night
- View the mutton birds at Griffith Island

## Key Markets

<table>
<thead>
<tr>
<th>International</th>
<th>Domestic</th>
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<tbody>
<tr>
<td>UK</td>
<td>Visible Achievement</td>
</tr>
<tr>
<td>Germany</td>
<td>Socially Aware</td>
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<tr>
<td>USA</td>
<td></td>
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<tr>
<td>China</td>
<td></td>
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<tr>
<td>New Zealand</td>
<td></td>
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<tr>
<td>Key Markets</td>
<td>The Great Ocean Road can offer these experiences</td>
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</tr>
<tr>
<td><strong>Indigenous Culture Experiences</strong></td>
<td>Learning about Indigenous heritage and contemporary culture at Narana Creations, Geelong Learning about the Budj Bim National Heritage Landscape and the cool climate Indigenous culture, Lake Condah Learning about the Worn Gundidj/Tower Hill Game Reserve Learn about the Gadjabanud people along the Aboriginal Heritage Trail at Cape Otway Lightstation</td>
</tr>
<tr>
<td>International</td>
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<tr>
<td>UK</td>
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<tr>
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<tr>
<td>Traditional Family Life</td>
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<tr>
<td><strong>Wildlife Experiences</strong></td>
<td>Swim with dolphins and seals on Port Philip Bay View sting rays in Queenscliff Marina View the underwater world from a glass bottom boat at Queenscliff Visit Jirrahlinga Koala &amp; Wildlife Sanctuary in Barwon Heads See Kangaroos at the Anglesea Golf Course Wild Game fishing charters from Portland and Apollo Bay Koala viewing at Kennett River Kayaking and boating through seal colony at Apollo Bay and Cape Bridgewater See the rare Australian Platypus at Lake Elizabeth Great Ocean Road Centre for Conservation and Ecology - Tiger Quolls and Koalas Enjoy a paddle with the platypuses tour from Lorne or Apollo Bay Whale watching right along the coast from Apollo Bay Fairy penguin viewing at the 12 Apostles at dusk down Wildlife viewing at Port Campbell National Park Watch southern right whales from the shoreline at the nursery in Warrnambool. Viewing Australian megafauna in their habitat (Kangaroos, Emus and Wallabies) at Tower Hill State Reserve Kayaking and boating through seal colony at Apollo Bay and Cape Bridgewater Whale watching from the beach at Portland View Little Penguins at the 12 Apostles and London Bridge at dusk View thousands of Shearwaters returning to roost at Mutton Bird Island (Loch Ard Gorge) Take a night walk to view glow worms at Melba Gully State Park View kangaroos on the Gellibrand River Estuary Interact with native wildlife at the Great Ocean Road Wildlife Park</td>
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# Shopping Experiences

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<tbody>
<tr>
<td><strong>International</strong></td>
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</tr>
<tr>
<td>Germany</td>
<td>Spend the morning visiting the Geelong, Bannockburn and Bellarine Farmers’ Markets</td>
<td>Visit some of the best Great Ocean Road village boutiques via a self-drive map</td>
</tr>
<tr>
<td>USA</td>
<td>Visit Geelong’s major shopping centres (Westfield, Market Square and Waurn Ponds) and strip shopping in Pakington Street Geelong West and High Street Belmont</td>
<td>Immerse yourself in the surf culture whilst shopping at Surf City, Torquay</td>
</tr>
<tr>
<td>China</td>
<td>Shop at the iconic local and international surf labels at Torquay Surf Precinct</td>
<td>Shop for iconic and quality Great Ocean Road art work at one of the galleries in the region</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Meander through the Great Ocean Road village boutiques</td>
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</tr>
<tr>
<td><strong>Domestic</strong></td>
<td>Visit the Apollo Bay Foreshore Farmers’ Market</td>
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<tr>
<td>Visible Achievement</td>
<td>Visit Port Fairy Village</td>
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<tr>
<td>Young Optimism</td>
<td>Shopping in Warrnambool Regional City</td>
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<tr>
<td>Event Experiences</td>
<td>The Great Ocean Road can offer these experiences</td>
<td>Potential experience opportunities</td>
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</tr>
<tr>
<td>International</td>
<td>Attend a conference, exhibition and corporate retreat in Geelong and on the Bellarine</td>
<td>Meet the locals and taste the local produce at the Timboon &amp; Great Ocean Road Food and Wine Festival</td>
</tr>
<tr>
<td>UK</td>
<td>Marvel at aircraft new and old at the Australian International Air show, Avalon</td>
<td>Experience the best of the Great Ocean Road’s regional produce at the Great Ocean Road Food Adventure</td>
</tr>
<tr>
<td>USA</td>
<td>Experience Australian Rules Football at Kardinia Park</td>
<td>Celebrate the Indigenous heritage of the Great Ocean Road at an event hosted by the traditional owners</td>
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<tr>
<td></td>
<td>Watching the boats on Corio Bay during Festival of Sail</td>
<td>Experience music by the 12 Apostles at the Glenample Homestead</td>
</tr>
<tr>
<td></td>
<td>Listen to Australia’s best blues, jazz, pop, rock &amp; funk at the Queenscliff Music and Meredith Festivals</td>
<td>Participate in an event which celebrates the maritime roots of the region mixed with the wealth of musical talent</td>
</tr>
<tr>
<td></td>
<td>Watch elite cyclists take on the oldest road cycling classic in the world - Melbourne to Warrnambool</td>
<td>Experience an eclectic musical mix at one of the festivals along the ‘Music Coast’</td>
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<td></td>
<td>Experience the unique and world’s only Blues Train</td>
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<td></td>
<td>National Celtic Festival at Portarlington</td>
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<td></td>
<td>Rowing on Barwon River - Head of School Girls and Barwon Regattas</td>
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<td>Swim the iconic Pier to Pub, Lorne</td>
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<td>Experience the iconic Rip Curl Pro, Bells Beach</td>
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<td></td>
<td>Listen to world class music over the New Year at the Falls Festival</td>
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<td>Challenge yourself in the mountain to surf run</td>
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<td>Attempt or support your friends at the Great Ocean Road Marathon (Lorne to Apollo Bay)</td>
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<tr>
<td></td>
<td>Challenge yourself in the Anaconda Adventure Race</td>
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<td></td>
<td>Cycle the Great Ocean Road in the Amy Gillett Gran Fondo</td>
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<td></td>
<td>Experience the Apollo Bay Music Festival.</td>
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<td></td>
<td>Apollo Bay Sea Food Festival</td>
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<td></td>
<td>Experience the 1950s at the Camperdown Cruise Rockabilly Festival</td>
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<td>Be involved with the Casterton Kelpie Festival</td>
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<td>Portland Upwelling Festival</td>
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<td></td>
<td>Experience four days of folk, blues, jazz and country music at the Port Fairy Music Festival</td>
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<td></td>
<td>Experience what life was like in Warrnambool in the 1870’s at Flagstaff Hill’s Shipwrecked Sound and Light Show</td>
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<td>Experience the Fun 4 Kids Festival</td>
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<td>Experience the Australian Horse racing culture at Warrnambool racecourse</td>
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<td></td>
<td>Experience Whale Boat Racing on the Hopkins River</td>
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<td>Watch elite cyclists take on the oldest road cycling classic in the world - Melbourne to Warrnambool</td>
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<tr>
<td></td>
<td>Experience the Warrnambool Speedway</td>
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</table>

| Art & Culture     | Geelong Performing Arts Centre (GPAC)                                                                                                                                                                                                                 | Explore the beauty of the coastline whilst visiting the many sculptures in the Sculpture by the Sea festival                                                                             |
|                   | Geelong Gallery                                                                                                                                                                                                                                       | Tour the hinterland of the Great Ocean Road Region to discover local arts and crafts                                                                                                      |
|                   | Portland Arts Centre                                                                                                                                                                                                                                 |                                                                                                                                                                                           |
|                   | Warrnambool Art Gallery                                                                                                                                                                                                                               | Visit world class exhibitions at the Warrnambool Art Gallery                                                                                                                              |
|                   | Lorne Sculpture Walk                                                                                                                                                                                                                                 |                                                                                                                                                                                           |
|                   | Scope Gallery, Warrnambool                                                                                                                                                                   |                                                                                                                                                                                           |
8. CONCLUSIONS

8.1. EXPERIENTIAL DEVELOPMENT OPPORTUNITIES

This report highlights a multitude of experience development opportunities that exist within the Great Ocean Road. As the beginning of this report emphasizes, in order to appeal to the high yielding experience seeker markets the Great Ocean Road Region must provide authentic and unique experiences, those which challenge the visitor and enable active participation. Opportunities include developing experiences around the wealth of fresh seafood in the region, destination and waterfront dining, as well as enhancing existing product through additional interpretation and interactivity and creating unique experiences around and within the natural landscape.

Much of the product and natural setting is already in place, and it is through the development and enhancement of these assets that truly unique tourism experiences can be created that will be able to set the Great Ocean Road apart from other destinations and create greater regional dispersal and yield.

The following opportunities focus on developing some unique experiences using the existing tourism assets. These opportunities have been developed through industry consultation, analysis of the current experiences within the Great Ocean Road and information sourced from the product audit and gaps identified within this. They have been divided into experience preference.

The following presents some key opportunities which should be the focus of further consideration and development. Whilst it is acknowledged that some of the following opportunities listed here do currently exist, they have been referenced in this report as they have further growth potential.

8.2. FOOD & WINE

Although food and wine is not considered the primary strength, there is an abundance of fresh food produced throughout the region. As a result, several produce trails have emerged, resulting in a greater regional produce experience.

A good example is the Bellarine Taste Trail which has grown to include 65 producers of wine, boutique beers and farmgate produce. There are also some emerging nodes outside of the Eastern precincts, including the Timboon hinterland area which features the 12 Apostles Gourmet Food Trail and the Otway Harvest Trail which extends from the Surf Coast through to the Otways hinterland. All three have the potential to grow further and to develop regional brands synonymous for quality regional produce.

The abundance of fresh seafood off the coast, including mussels, abalone, rock lobster, crayfish, Portland bay bugs and salmon is also a clear regional strength. The potential for further experience development has been divided into three sub themes, seafood experience development, signature dining and food and wine touring.

8.2.1. SEAFOOD EXPERIENCE DEVELOPMENT

There are significant gaps in relation access of fresh seafood, with little opportunity to purchase local seafood within restaurants and seafood outlets as the majority of stock is transported to Melbourne: this is especially the case towards the western end of the region. This presents potential for seafood experience development and opportunity to build the region’s reputation. Some opportunities include:

- Purchase fresh seafood from one of the many seafood co-ops along the coast;
- Eat freshly caught local seafood, including Portland bay bugs, crayfish, abalone and salmon bought from an outlet on the foreshore at Portland;
- Taste freshly caught local seafood at one of the quality seafood restaurants on the coast; and
- Learn how to cook some of the beautiful fresh seafood sourced straight from the ports on a regional seafood tour and cooking lesson.

8.2.2. SIGNATURE DINING EXPERIENCES

The following refers to the development of signature dining experiences, which has been identified as an experience gap within the region. The development of world class dining experiences could enhance the region’s reputation and appeal to the high yielding experience seeker markets. Iconic dining experiences that take advantage of the fresh seafood, fresh regional produce and the unique wilderness setting or iconic seaside location with views over the Great Ocean Road could enhance the region’s experience offering. Some opportunities include:
- Taste regional produce at quality waterfront restaurants along the coast;
- Experience world class cuisine in a unique wilderness setting at Moonlight Head and Cape Otway.
- Experience world class dining and local wines and produce at Bellarine wineries.

8.2.3. FOOD AND WINE TOURING
There is opportunity to develop small touring opportunities that enable visitors to experience authentic and unique food and wine experiences not possible through self-exploration. Opportunities include:
- Provide the opportunity to purchase fresh local produce from vibrant local farmers markets dotted right throughout the region;
- Join a small tour visiting local producers followed by a cooking lesson;
- Take a tour exploring the Aboriginal Cultural and Food History of the Great Ocean Road. Experience food prepared and based on bush produce seen whilst touring;
- Join a day tour from Melbourne visiting the best of the Geelong, Bellarine and Moorabool wineries and breweries;
- Experience the region’s unique wildlife and artisan local produce on a small day tour from Port Campbell to Tower Hill;
- Join an exclusive food trail tour to taste fresh produce from the farm gate and purchase local fare at the produce stores in the Timboon region or Harvest Trail;
- Spend the afternoon visiting local cheese and butter producers at their farm gate or factory stores in Warnambool and Camperdown; and
- Join an organised group tour for breakfast at the 12 Apostles.

8.3. HISTORY & HERITAGE
The history and heritage of the indigenous people has been examined independently on page 36.

8.3.1. SURFING CULTURE AND HISTORY
The history of surfing is a significant element in the product offering at the eastern end of the region. The future Surf City development in Torquay as well as the development at Belis Beach will only strengthen the existing offer.

8.3.2. MARITIME HISTORY
Maritime history is the clear historical theme within the region. There are obvious opportunities to develop the interpretation at key visitor nodes, such as Loch Ard Gorge, and link this with the significant historical artefacts and display at Flagstaff Hill in Warrnambool. Key opportunities include:
- Maritime heritage tour including self-drive lighthouse tour of the Great Ocean Road, supported by smart phone apps for interpretation;
- Learn about the maritime history of the Shipwreck Coast through interactive and interpretive displays at Loch Ard Gorge with strong connections to the regional maritime history museum at Flagstaff Hill;
- Visit the expanded maritime history museum at Flagstaff Hill which can showcase the full collection of over 12,000 pieces of historical significance; and
- Stay overnight at the renovated historic Glenample Homestead just a stone’s throw from the 12 Apostles.
8.3.3. MILITARY HISTORY
There are opportunities to enhance the experience relating to the military history at Queenscliff such as a guided or self-guided tour of the fort and gun emplacements.

8.3.4. THE HISTORY OF THE GREAT OCEAN ROAD
The history of the Great Ocean Road is also of key significance and the future development at the Lorne Visitor Information Centre will help communicate this story.

8.4. NATURE BASED/ADVENTURE/WALKING

8.4.1. WATER BASED AND ADVENTURE EXPERIENCES
Following industry consultation it became evident that there are experience gaps in relation to organised water based tours and opportunities to hire vessels to explore the water. This is particularly the case in Portland, Port Campbell, Port Fairy, Apollo Bay and Lorne. There are also gaps in surf fishing and off shore fishing adventures which take advantage of the marine life in the waters off the Great Ocean Road.

- Join a surf fishing tour visiting various beaches and stopping off at one of the quality seafood restaurants or cafes along the way;
- Explore the extended network of adventure trails by motorbike, 4WD or horseback;
- Join a tour or self cycle along the iconic Great Ocean Road;
- Get a taste for the best of the Bellarine Peninsula’s golf courses and regional cuisine on a small organised tour of the region;
- Join a horse riding tour in the Bellarine, from Portarlington in the north to Queenscliff in the south;
- Join a surf fishing or offshore fishing adventure to catch local specialties such as Portland bay bugs, crayfish, abalone and salmon;
- Spend the day sailing round the waters off Apollo Bay;
- Dive at a purpose designed dive wreck site off Warrnambool;
- Join a day sailing adventure to Lady Julia Percy Island;
- Join a sea or estuary kayak tour off Port Campbell or Peterborough; and
- Join a fast speed jet boat tour out to the 12 Apostles from Port Campbell.

8.4.2. NATURE BASED AND WALKING
The key opportunity to enhance the nature based experiences is the development of accommodation within a unique wilderness setting. Principal sites are within the Tower Hill precinct and along the two iconic walks, the Great South West Walk and the Great Ocean Walk.

- Participate in a guided overnight South West Walk tour, being accommodated off the trail each night;
- Spend the night surrounded by nature and wildlife at the permanent camp site at Tower Hill State Game Reserve;
- Visit the 12 Apostles and learn about the surrounding area at the Loch Ard Interpretive Centre;
- Cycle or walk the scenic Apostles Trail from Timboon to Port Campbell;
- Spend the night at a unique wilderness camp, waking up to the sound of wildlife whilst surrounded by the beauty of the natural landscape; and
- Experience the beauty and seclusion of the Great Ocean Walk by day and rest in nature based accommodation by night.

8.5. INDIGENOUS
There is not an abundance of indigenous cultural experiences within the region. However, additional interpretation and tours at key sites as listed below have been highlighted as key opportunities to develop this product.

- Bush food experience at Lake Condah and Tower Hill;
- Day tour exploring the Aboriginal Cultural and Food History of the Great Ocean Road. Including exploration of a network of aboriginal cultural sites in the region including at Lake Condah/Budj Bim, Mount Eccles and Tower Hill;
- Learn about the indigenous history of Warrnambool at Flagstaff Hill; and
• Spend the night surrounded by nature and wildlife at the permanent camp site at Tower Hill State Game Reserve.

8.6. WILDLIFE

Visitors can engage with and view wildlife firsthand across the region, however there are still many ways in which this experience could be enhanced and enable more active participation. One such opportunity is in regards to whale watching which is key strength. There are opportunities to develop organised whale watching expeditions especially from Portland which is a key opportunity on the western area of the region. Tower Hill as a key wildlife experience could also be enhanced through the provision of additional interpretation and an opportunity to immerse oneself in the surrounds by staying in permanent camping sites.

• Feed the stingrays within the Marine amphitheatre at Queenscliffe Harbour;
• Wildlife tours, including a self-drive wildlife exploration journey, taking in the best viewing spots along the Great Ocean Road;
• View the southern right whales from a purpose designed and interpretive space at the shoreline at the nursery in Warrnambool;
• Learn about the whales through interpretive an interactive displays at Portland’s enhanced Maritime Discovery Centre followed by an up-close encounter on a whale watching tour in the waters off Portland;
• Visit a newly developed marine park within the Flagstaff Hill precinct to learn about the aquatic life in the waters off Warrnambool;
• Join a small wildlife exploration tour on Griffiths Island off Port Fairy; and
• Spend the night surrounded by nature and wildlife at the permanent camp site at Tower Hill State Game Reserve.

8.7. EVENTS

Events are a key strength within the Great Ocean Road. Although there has not been any significant projects identified for experience development, there is opportunity to strengthen and build on existing events to ensure their future. In particular, there is opportunity for some existing events to be strengthened to internationally ready events, such as the Great Ocean Road Marathon.

One opportunity which could assist in building the food and wine experience are events which bring to the fore the number of food producers. There is also the potential to further draw on the region’s strength in significant music festivals and look at promoting it as the ‘Music Coast’.

8.8. SHOPPING

Shopping is not a key strength of the region other than surf products at Surf City, Torquay and small boutiques in coastal and hinterland villages. There is potential to improve the themed retail offer, including regional produce labels and other themed retail to strengthen the Great Ocean Road brand. Great Ocean Road official merchandise can be offered at VIC’s and boutiques throughout the region.

8.9. ART AND CULTURE

There is a wealth of art within independent galleries and café’s across the region as well as key regional galleries. There is opportunity to highlight this product and the artists through the development of a key regional art event whilst showcasing the dramatic coastal backdrop.

• Explore the beauty of the coastline whilst visiting the many sculptures in the Sculpture by the Sea festival.
• Tour the hinterland of the Great Ocean Road Region to discover local arts and crafts.
• Visit world class exhibitions at the Warrnambool Art Gallery

8.10. TOURING

Develop themed touring experiences along the Great Ocean Road, linked to the above strengths and experience seeker preferences supported by smart phone applications. This includes the following touring themes: GOR food, wine and seafood tour, GOR Maritime heritage tour, GOR indigenous heritage tour and GOR Wildlife Tour.
8.11. INITIAL RECOMMENDATIONS

The following recommendations should be considered with the aim to deliver the experience opportunities identified. The recommendations relate to experiences that link to preferences of experience seeker visitors in order to make the Great Ocean Road targeted to the experience seeker market.

SEAFood

Seafood, and its variety, is a strength of the region. However the accessibility to fresh seafood by visitors is limited through low awareness and poor infrastructure and product.

1. Further work in relation to this topic should consider the following:
   - Audit of seafood that is available across the region;
   - Audit of locations where fresh seafood is accessible;
   - Identifies and recommends how to deal with accessing seafood in the region, such as where co-ops could be strengthened;
   - Identifies sites throughout the region which could attract seafood related development/dining experiences;
   - Opportunities for private investment in tours and food experiences; and
   - Development of a themed Great Ocean Road Seafood experience tour that links the entire region.

WILDLIFE

Wildlife is a recurring theme across the Great Ocean Road, however the infrastructure and accessibility of this experience is limited. There is a need to strengthen the visitor experience through improved infrastructure across the region.

2. Further work in relation to this topic should consider the following:
   - An audit of all wildlife sites and supporting infrastructure available;
   - An audit of existing collateral and marketing material relating to wildlife sites;
   - Identifies infrastructure which could be developed to support the wildlife experience. This includes signage, interpretive signage, viewing platforms and associated smart phone applications; and
   - Potential for wildlife tour operators and other private sector investment.

MARITIME HISTORY

The maritime history of the region is unquestionably one of the region’s strengths. This theme is well developed and recognised in some areas, through well-developed product such as Flagstaff Hill and at Loch Ard Gorge. There is potential to strengthen this theme across the entirety of the Great Ocean Road, from Geelong to Portland.

3. Further work in relation to this topic should be developed to improve visitor’s heritage experience and consider the following:
   - Audit of all maritime history sites - shipwrecks, lighthouses, cannons etc;
   - Identification of existing maritime history infrastructure; and
   - Identification of strategies for strengthening visitor experience: tours, diving shipwrecks, interpretive information

DIVING

There has been potential identified in relation to creating additional diving opportunities along the coast. The region already boasts a unique diving environment; however there is potential to enhance the experience and encourage further marine life to thrive through sinking a vessel or piece of art such as took place off the coast at Ocean Grove in 2009.

4. Further work in relation to this topic should consider the following:
   - An audit of current significant dive sites along the coast;
   - Identification of potential dive sites and supporting infrastructure;
   - Undertaking a cost analysis in relation to sinking a dive piece;
   - Developing opportunities for private investment in diving tours.
EVENTS

There are numerous music and recreational events across the Great Ocean Road Region. However, there is no overarching strategy to provide goals and directions for existing and potential events. An events strategy will help to address which events are suited to the Great Ocean Road Region and where the gaps are in events provision in terms of timing, location, and theme.

5. Further work in relation to this topic should consider the following:
   - Gaps and opportunities for events;
   - Responsibility for event development;
   - Marketing of events;
   - Themes for events to be explored: outdoor adventure, cycling, food and wine, music.
   - Identify events which come become ‘internationally’ focused.

LUXURY TRAVELLERS

Evidence from international wholesalers highlights that luxury international travel in the Great Ocean Road Region is almost non-existent. The core reason for this is the lack of product targeted to this market, in particular high quality signature accommodation. There is a need to investigate this market more thoroughly and identify experiences and opportunities to attract this niche and lucrative market.

6. Further work in relation to this topic should consider the following:
   - Case studies of other luxury destinations;
   - Identification of needs to support this market;
   - Promote the development opportunities required to attract this market;
   - Spa and wellness product.

INDIGENOUS

Although indigenous product is limited, there is significant potential to enhance the story of the indigenous people of the region. Considering the identification of the Lake Condah/Budj Bim site development as a priority project, as well as the significant potential to enhance the Tower Hill site, an indigenous strategy would help identify additional sites for development and help create linkages between products.

7. Further work in relation to this topic should consider the following:
   - An audit of all indigenous sites and product in the region; and
   - Identification of strategies for strengthening the indigenous experiences and creating linkages between indigenous sites.
Great Ocean Road World Class Tourism Investment Study
A Product Gap Audit
Investment and Regulatory Reform Working Group

GREAT OCEAN ROAD
WORLD CLASS TOURISM INVESTMENT STUDY
A Product Gap Audit
Investment and Regulatory Reform Working Group
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# Great Ocean Road: World Class Tourism Investment Study

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PART A: PROJECT CONTEXT

PROJECT PURPOSE

THE PURPOSE OF THIS STUDY IS TO IDENTIFY WORLD CLASS TOURISM INFRASTRUCTURE AND TOURISM DEVELOPMENT PROJECTS WHICH WILL BOTH ENABLE FURTHER PRIVATE SECTOR INVESTMENT IN THE TOURISM INDUSTRY AND ATTRACT A GREATER PROPORTION OF HIGHER YIELDING AND EXPERIENCE SEEKER SEGMENTS TO THE GREAT OCEAN ROAD REGION.

HOW PROJECTS HAVE BEEN IDENTIFIED

The following chart shows the process for identifying priority projects for the Great Ocean Road Region:

- DEVELOPMENT OF PROJECT LIST THROUGH:
  1. Review of strategic policy context
  2. Identification of tourism product and infrastructure gaps
  3. Demand for product and infrastructure through assessment of market preferences and visitor forecasts

- DEVELOPMENT OF PROJECT ASSESSMENT CRITERIA
  In conjunction with the project steering committee, assessment criteria have been developed. These respond to the aims and objectives of the study.

- ASSESSMENT OF PROJECTS AGAINST ASSESSMENT CRITERIA
  With agreement from the project steering committee, projects have been assessed against criteria and prioritised accordingly.
STRATEGIC POLICY CONTEXT

A number of strategic plans have been prepared by State, Local and Australian Governments which reference the Great Ocean Road Region. The region is one of twelve in Australia which has been identified as a nationally significant landscape and recognised for capturing the essence of Australia for visitors. All levels of strategic policy highlight the importance of the Great Ocean Road region as a nature based tourism destination, which provides iconic experiences directed to a number of experience seeker segments, both from domestic and international markets.

Existing literature, in particular State and Regional strategies, highlight product and infrastructure potential which leverages off natural attractions, the coast and touring. These projects were used as a starting point for further investigation.

PART B: VISITOR DEMAND

TRENDS IN TOURIST VISITATION TO THE GREAT OCEAN ROAD REGION

The Great Ocean Road Region has maintained a consistent market share of Australian visitation over the past 10 years (including domestic and international visitors) at around 3% per annum.

Visitation to the Great Ocean Road Region peaked in 2000, coinciding with the Sydney Olympics. Since 2000 the region has maintained visitation between 6.5 and 7.5 million per year.

The Great Ocean Road Region has experienced growth in length of stay in all key origin markets. Growth in length of stay is particularly significant for international and interstate visitors. This may reflect improvement in activities and accommodation that have been developed in the region over this period, such as new internationally branded accommodation and new experiences on offer such as the Great Ocean Walk and Otway Fly.

Although visitation has declined over the past decade, the Great Ocean Road has maintained its share of Australia’s visitor expenditure through increased yield. This said recent improvements in tourism product and infrastructure have failed to increase market share in the region.
VISITOR SEGMENTATION

Urban Enterprise considered a number of market segment typologies at the commencement of this study for analysis. Through consultation with Tourism Australia and Tourism Victoria, the following segmentation has been analysed with respect to understanding market preferences for product and experiences in Australia and the Great Ocean Road Region. These segments are considered to be higher yielding and will form an area of focus for product development and destination marketing.

International visitor markets (derived from Tourism Australia Experience Seeker Segments):

- United Kingdom experience seekers;
- Chinese experience seekers;
- German experience seekers;
- Japanese experience seekers;
- American (USA) experience seekers;
- New Zealand experience seekers;
- Indian experience seekers.

Domestic visitor markets (derived from Roy Morgan Values Segments):

- Visible Achievement;
- Socially Aware;
- Traditional Family Life;
- Young Optimism.

The Melbourne short break market is also considered important for the Great Ocean Road region and is represented by the four domestic visitor segments identified above.

Other Roy Morgan Values Segments such as ‘Conventional Family Life’ and ‘Look at Me’ are important traveller markets and may be considered, however these are seen as secondary markets to the Great Ocean Road region product audit project, for example ‘Conventional Family Life’ is a lower yielding market and holiday preferences for ‘Look at Me’ are not matched well to the nature based strengths of the region.
There were 2.7 million experience seekers who visited Australia in 2010. Of these 10% or 260,000 visited the Great Ocean Road Region. The Great Ocean Road region attracted a higher proportion of experience seekers from other Europe, United Kingdom, Germany and China. The Great Ocean Road Region, however has an under-representation in experience seekers from New Zealand, Indonesia, Singapore and Japan, of which both Japan and New Zealand are considered key experience seeker markets for Australia. The reason for this is partly due to the product and experience availability in the Great Ocean Road Region, not meeting market segments preferences. For instance, data from the International Visitor Survey highlights that Japanese visitors have a low preference for nature based tourism. The Indian experience seeker market is in its infancy and visitation to the Great Ocean Road Region is currently low (around 3%); however expectations are that this segment will grow significantly over time.

The key experience seeker preferences which overlap across all of the key origin markets include:

**PRIMARY PREFERRED EXPERIENCES**

Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key origin markets.

Nature based experience. This is the second most common preference for experience seekers from all origin markets and is a key preference for all markets identified except Japan.

Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

**SECONDARY PREFERRED EXPERIENCES**

Festivals and events. German, British and American experience seekers had a preference for attending festivals and events.

Walking experience. German and American experience seekers had a preference for a walking experience, however this was not matched by other markets.

**ACCOMMODATION PREFERENCES**

The accommodation preferences for international experience seekers varies significantly by market and highlights the need to provide a variety of accommodation options to meet the experience seeker market demand. Preferences include budget hotels, 4/5 star hotels, guest houses/B&Bs and self-contained accommodation and Tourist Parks.

**YIELD**

The highest yielding international experience seeker market when visiting the Great Ocean Road Region is Germany. International experience seekers from New Zealand and the United Kingdom have moderate levels of spend in the Region. The emerging market of China has the lowest spend of experience seeker segments in the Great Ocean Road Region.
The Great Ocean Road Region attracts high proportions of Visible Achievement and Socially Aware segments, highlighting a good match between product and experience supply and market preferences for these segments.

YIELD

Socially Aware is the highest yielding domestic segment, this is followed by Traditional Family Life and Visible Achievement. The Great Ocean Road Region’s product mix is well suited to the Socially Aware market preferences.

KEY DOMESTIC VISITOR SEGMENTS

Note the remaining 23% of visitors are spread across a six other segments which are less important for tourism due to low travel preferences.

The key Roy Morgan Market Values Segments identified for domestic markets are Visible Achievement, Socially Aware, Traditional Family Life and Young Optimism. These segments contribute around 77% of domestic visitors in Australia. Out of these, the key targets for tourism are Visible Achievement and Socially Aware, these segments are more likely to seek out unique experiences and spend more when visiting.

In terms of holiday preferences the following experiences are important to the Visible Achievement and Socially Aware segments:

Food and wine experience;

Nature based tourism experience;

Wildlife experience.
VISITATION GROWTH FORECASTS

FORECAST GROWTH IN THE GREAT OCEAN ROAD REGION

Projected forecasts of visitation show that the Great Ocean Road Region will attract between 9.6 million and 10.5 million visitors by 2030. At a minimum this is growth of 2.4 million on existing visitation levels.

<table>
<thead>
<tr>
<th>Year</th>
<th>2030 Low-Base Growth Scenario</th>
<th>2030 Medium Growth Scenario</th>
<th>2030 High Growth Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>7.2 Million</td>
<td>9.6 Million</td>
<td>9.7 Million</td>
</tr>
<tr>
<td>2030</td>
<td>10.5 Million</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

INTERNATIONAL VISITOR FORECAST

Using the low base case scenario, international visitors to the Great Ocean Road region are forecast to increase at 3.9% per annum from 2010-2030. This equates to an additional 560,000 international visitors to the Great Ocean Road Region by 2030 (more than double the existing visitation). The experience seeker markets that are projected to grow most in percentage terms are:

- India (8.9%);
- China (8.5%);
- Continental Europe (4.1%);
- USA (3.1%).

By 2030, Continental Europe will have secured its place as the most important international experience seeker market and China will become the 2nd most important international experience seeker market in terms of total visitors to the Great Ocean Road region over the next 20 years.

In terms of visitor expenditure Continental Europe will strengthen its position as the most important experience seeker segment to the Great Ocean Road Region by 2030. In contrast, China’s projected growth is less pronounced when total expenditure is projected due to the lower yield of the Chinese visitor segment.
PROJECTED GROWTH IN INTERNATIONAL EXPERIENCE SEEKER SEGMENTS TO GREAT OCEAN ROAD (VISITOR EXPENDITURE)

DOMESTIC VISITOR FORECAST

Using the base case scenario, domestic visitation is projected to increase by 1.7 million visitors between 2010-2030.

The key markets that are projected to grow the most by percentage increase are:

- Visible Achievement provided the largest number of visitors to the Great Ocean Road Region in 2010 of all domestic values segments. Forecast projections for the Great Ocean Road Region show that Socially Aware will equal this by 2030. Socially Aware is the highest performing segment in terms of total expenditure in 2010 and by 2030 Socially Aware will increase its position over other segments in terms of expenditure, highlighting the increasing importance of this Socially Aware for the Great Ocean Road Region.

PROJECTED GROWTH KEY DOMESTIC SEGMENTS (TOTAL VISITORS)
FORECAST DEMAND FOR PRODUCT AND INFRASTRUCTURE

ACCOMMODATION

An additional 3,440 commercial guest rooms will be required across the Great Ocean Road Region should the high growth scenario be reached by 2030. Indicatively the following accommodation establishments will be required to support projected growth:

- Up to 4 large resorts of 4.5 star standard;
- 90 farm stay accommodation establishments;
- Up to 5 new large backpacker hostels;
- Up to 5 new caravan or tourist parks;
- Up to 12 new hotels/motels of various scale and star rating including budget and also 5 star with international branding;
- Up to 50 Guest houses and B&Bs;
- Self-contained apartments and houses across the region.

Some of the projected requirement for additional capacity should be directed to existing accommodation establishments. Increase to the size of existing establishments would improve economies of scale for businesses and also provide refreshed and contemporary accommodation to meet market expectations.

TRANSPORT

Transport links will need to accommodate the forecast growth in visitation. The following strategies are considered critical to provide for long term growth:

- Princes Highway duplication to Colac;
- Continuous improvement of safety and road quality including shoulder sealing, ongoing maintenance, and resealing sections on the Great Ocean Road and associated link roads.
- Additional rail services and new rolling stock to cater for visitors travelling by train;
- Air services to international markets through Avalon Airport.

ATTRACTIONS

An additional 2.4 million visitors (base case scenario) will have a significant impact on attractions in the region. Capacity and infrastructure at existing attractions will need to be upgraded to support forecast demand, whilst new attractions suited to key visitor markets should also be considered in the region.
PART C: TOURISM AUDITS

VISITOR EXPERIENCE AUDIT

Visitor experiences in the Great Ocean Road Region have been identified through a review of existing literature and through consultation with GOR stakeholders.

The iconic and unique visitor experiences in the Great Ocean Road Region include:

- Drive the Great Ocean Road;
- View the 12 Apostles;
- Follow the Great Ocean Walk;
- Visit Bells Beach and experience the surf culture at surf breaks, shops and coastal towns;
- Discover maritime history;
- View Australian wildlife.

The majority of the iconic experiences in the Great Ocean Road region are centred on nature based tourism. There are a range of other experiences across the region, which whilst not iconic, provide the visitor with a high quality experience. These include:

- Food and wine experience including dining at seaside villages and visiting wineries/cellar doors;
- Heritage and history experience including maritime history along the shipwreck coast such as Flagstaff Hill, surf history in Torquay and lighthouses/light stations;
- Events and Festivals: various well branded and high quality recreation/ nature based events (e.g.: Great Ocean Road marathon, Melbourne to Warrnambool Classic cycling race, Fun4Kids Festival, Rip Curl Pro, Australian Rules football at Kardinia Park) and large music events (e.g.: Falls Festival, Port Fairy Folk Festival).

In addition to music and nature based events, business events are also prominent in the region, particularly in Geelong and Surf Coast;

These experiences could be further developed through investment in infrastructure and product, leading to the development of new iconic experiences, for example:

- Cycle the Great Ocean Road Region;
- Experience the Wild South Ocean by Sea;
- Taste the Great South Ocean;
- Learn about Southern Australian Aboriginal Culture and Settlement;
- Attend a Great Australian Music Event;
- Attend a Great Australian Sporting Event.

The diagram below represents the availability of key preferred experiences in the Great Ocean Road Region. Nature based tourism experiences are the most numerous, whilst shopping experiences are lowest in supply.
SUPPLY OF GREAT OCEAN ROAD EXPERIENCES FOR KEY MARKET SEGMENT PREFERENCES

TOURISM PRODUCT AND INFRASTRUCTURE AUDIT

TOURISM PRODUCT

STRENGTHS

The Great Ocean Road Region has its primary strength in nature based tourism. Nature based tourism is available at a number of nodes in the region, including the Great Otway National Park and Otway Forest, Port Campbell National Park and Cape Bridgewater/Lower Glenelg National Park. Water based tourism is a consistent theme throughout the Great Ocean Road region.

Secondary strengths include food and wine, wildlife, history and heritage and events.

Emerging product includes indigenous and wellness tourism.

WEAKNESSES

Weaknesses in the region relate to the lack of complementary product and infrastructure building on the key product themes of the region such as nature based tourism, food and wine and history and heritage. This includes day visitor facilities, interpretation and accommodation linked to nature based attractions. Food and wine product can be strengthened through leveraging off the seafood strengths and local produce in the region.

The food and wine and nature based tourism experiences in the hinterland are hampered by the lack of connections to the Great Ocean Road.

A key gap for the region is the low supply of high quality internationally branded accommodation, particularly along the Great Ocean Road. Internationally branded accommodation is located in Warrnambool, Torquay, Lorne and Geelong.

INFRASTRUCTURE

EXISTING CRITICAL TOURISM INFRASTRUCTURE

Critical infrastructure items for tourism in the Great Ocean Road Region include:

The Great Ocean Road. Most major icons of the region including the 12 Apostles, coastal villages, walks and beaches are accessible via the Great Ocean Road.

Princes Highway. Whilst not the key tourist route, it is essential for returning visitors to Melbourne and beyond to their next destination;

Harbours, marinas, piers and jetties. Access to the water is critical for the Great Ocean Road region, and whilst there is great potential to improve this, water based infrastructure adds significantly to the visitor experience;

Parks infrastructure. There are a number of National Parks, coastal reserves and gardens throughout the region that provide both passive and recreation experiences. Infrastructure at these public reserves is critical to support these activities;

Avalon Airport. Jetstar, Tiger and Sharp airlines currently fly out of Avalon Airport, servicing Sydney, Brisbane, Perth, Adelaide and Portland.
AREAS OF INFRASTRUCTURE REQUIRED FOR IMPROVEMENT

The following infrastructure items are identified for improvement in the Great Ocean Road region; these will assist to support the growth of tourism.

Improvements and capacity of the Great Ocean Road. The Great Ocean Road is at capacity during peak times. Improvement to parking bays, rest areas and passing bays needs to be explored. The general road quality also needs to be improved;

Princes Highway. The Princes Highway is in poor condition from Winchelsea to Warrnambool, there is a need to improve the road into a dual carriageway to support growth in population and visitors;

Harbours, marinas, piers and jetties. There are numerous development plans in places for harbours and marinas along the coast. These will improve water access significantly in the region;

Park infrastructure. There is a need to improve facilities and infrastructure at various parks locations across the region to meet visitor expectations;

Airport upgrades. Airport upgrades are required at Warrnambool and Avalon. This will improve access into the region significantly;

Public transport. Improved regularity of train services along the Princes Highway Corridor and significantly improved public bus transport along the Great Ocean Road is necessary to meet existing and future demand for independent travellers. There is also a need to upgrade the rolling stock servicing this corridor.

Accommodation. There are areas within the Great Ocean Road region that lack tourist accommodation, particularly internationally branded accommodation at the higher end of the market.
**Key Product Strengths**

The table below highlights the key product strengths of the region, the areas shaded in light red are those which match with market preferences.

**Overview of Product Strengths and Weaknesses/Gaps**

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Key Strengths</th>
<th>Weaknesses/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Product</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nature Based Tourism</td>
<td>Port Campbell National Park, including the 12 Apostles</td>
<td>Lack of interpretation of natural attractions</td>
</tr>
<tr>
<td></td>
<td>Great Otway National Park</td>
<td>Poor access to marine National Parks</td>
</tr>
<tr>
<td></td>
<td>Cape Bridgewater/Lower Glenelg NP</td>
<td>Day visitor facilities at National Parks</td>
</tr>
<tr>
<td></td>
<td>Marine National Parks</td>
<td>Accommodation linking to natural attractions</td>
</tr>
<tr>
<td></td>
<td>Great Ocean Walk, Great South Coast Walk, Surf Coast Walk</td>
<td>Trail infrastructure</td>
</tr>
<tr>
<td></td>
<td>Tower Hill</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Waterfalls</td>
<td></td>
</tr>
<tr>
<td><strong>Secondary Product</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife</td>
<td>Koalas at Kennet River</td>
<td>Formal infrastructure and facilities at wildlife viewing points</td>
</tr>
<tr>
<td></td>
<td>Kangaroos, emus and Wallabies at Tower Hill</td>
<td>Access to whale watching/tours</td>
</tr>
<tr>
<td></td>
<td>Whale and seal watching at Apollo Bay, Warrnambool and Portland</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Platypus at Lake Elizabeth</td>
<td></td>
</tr>
<tr>
<td>Food and Wine</td>
<td>Geelong and Henty wine regions</td>
<td>Fresh seafood sales</td>
</tr>
<tr>
<td></td>
<td>Villages dining</td>
<td>Fresh seafood restaurants</td>
</tr>
<tr>
<td></td>
<td>Local produce</td>
<td>Waterside dining</td>
</tr>
<tr>
<td>History and Heritage</td>
<td>Surfing history</td>
<td>Quality of surf museum.</td>
</tr>
<tr>
<td></td>
<td>Shipwreck history</td>
<td>History of the road itself - consider National, and possible World Heritage Listing</td>
</tr>
<tr>
<td></td>
<td>Flagstaff Hill Maritime Village</td>
<td></td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Art and culture</th>
<th>Village boutiques</th>
<th>Surf culture</th>
<th>No large regional gallery outside of Geelong.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golf</td>
<td>Coastal courses</td>
<td></td>
<td>Complimentary product - accommodation, food, retail</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Motels</td>
<td>3 star quality accommodation</td>
<td>Internationally branded hotels, particularly on the Great Ocean Road (past Torquay)</td>
</tr>
<tr>
<td></td>
<td>B&amp;Bs</td>
<td>Coastal Holiday and Caravan Parks</td>
<td>Farm stay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Integrated resort, Corangamite Shire</td>
</tr>
<tr>
<td>Cycling</td>
<td>Challenging and scenic trails</td>
<td></td>
<td>Services for cyclists (spares etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Complimentary product - Accommodation, food, retail</td>
</tr>
<tr>
<td>Festivals and events</td>
<td>Music festivals</td>
<td>Nature based</td>
<td>Event venues</td>
</tr>
<tr>
<td></td>
<td>Recreation/sports events</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Events = Meetings, Incentives, Conventions and Exhibitions</td>
<td>Business Events</td>
<td>Conferencing</td>
<td>No large international event venue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>No large dining venue outside hotels</td>
</tr>
<tr>
<td>Indigenous</td>
<td>Lake Condah/Mt Eccles</td>
<td>Tower Hill</td>
<td>Facilities at Tower Hill and Mt Eccles</td>
</tr>
<tr>
<td>Emerging Product</td>
<td>Lorne and Torquay</td>
<td>Warrnambool Geothermal Spa</td>
<td>No large spa or wellness facility</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Geothermal spas</td>
</tr>
</tbody>
</table>
BARRIERS TO INVESTMENT

Consultation with industry representatives has identified several issues that are impacting on further investment in tourism product and infrastructure in the Great Ocean Road region. These obstacles include: labour supply, finance, land use zones, public land leases, tour operating licenses, and fisheries legislation.

Strategies need to be developed which curb these barriers to investment in order for the timely delivery and investment in tourism projects.

PART D – TOURISM PROJECTS

PRIORITY TOURISM INFRASTRUCTURE AND PRODUCT DEVELOPMENT

PROJECTS

The following table provides a list of priority investment projects in the Great Ocean Road Region. These have been assessed against the following criteria:

**Game changer.** Project will significantly change tourism in the region by enabling significant new investment.

**Matches/enables to demand by experience seeker segments.** Preferences for key target international and interstate experience seeker markets have been met.

**Creates/ enables an iconic experience.** Projects which provide or facilitate an iconic experience in the Great Ocean Road Region which becomes a motivator for travel.

**Encourages yield, length of stay of visitors.** Projects which encourage greater visitor yield as opposed higher levels of lower yielding visitors.

**Creates/ enables additional capacity.** Projects which create more capacity within the region to accommodate projected growth.

**Facilitates/ enables new niche higher yielding visitor markets.** Projects which provide a new experience which encourages new higher yield markets to visit which may not currently being accommodated in the region.

**Encourages/ enables seasonal dispersal of visitors.** Projects which encourage visitation during the off peak and shoulder periods.

**Encourages/ enables geographic dispersal of visitors.** Projects which encourage dispersal of visitors to geographic locations which do not attract high levels of peak visitation.

**Matches/ enables demand from Melbourne short break market.** These are locations of product and product typologies that meet the high yield Melbourne short break market.
### PRIORITY PROJECTS

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Project cost*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Campbell Precinct and Loch Ard Interpretive Centre</td>
<td>$100 million</td>
</tr>
<tr>
<td>The establishment of a significant interpretive centre at Loch Ard Gorge and upgrade to Parks infrastructure throughout the Port Campbell area, incorporating the Apostles shared trail is included in the concept.</td>
<td></td>
</tr>
<tr>
<td>Great Ocean Walk.</td>
<td>$10 million</td>
</tr>
<tr>
<td>Upgrade of trail infrastructure to an international standard.</td>
<td></td>
</tr>
<tr>
<td>Great Ocean Road Signature Accommodation, Moonlight Head</td>
<td>$20 million</td>
</tr>
<tr>
<td>A 5 star internationally branded wilderness lodge in Moonlight Head area with outstanding coastal views.</td>
<td></td>
</tr>
<tr>
<td>Lake Condah/ Budj Bim National Heritage Landscape</td>
<td>$54 million</td>
</tr>
<tr>
<td>Nature based accommodation, multiple nodes of interpretation, trails, educational tours and activities.</td>
<td></td>
</tr>
<tr>
<td>Upgrade of Avalon Airport to International Standard</td>
<td>$15 million</td>
</tr>
<tr>
<td>Establishment of an international terminal and other infrastructure improvements to accommodate international flights.</td>
<td></td>
</tr>
<tr>
<td>Great Ocean Road and Link Roads Upgrade</td>
<td>$50 million</td>
</tr>
<tr>
<td>Continuous improvement of the Great Ocean Road and link roads to a 'showcase' standard to reflect the road's role for tourism. $(10 million per annum)</td>
<td></td>
</tr>
<tr>
<td>Great Ocean Road Integrated Resort, Port Campbell Area</td>
<td>$35 million</td>
</tr>
<tr>
<td>A 4 star internationally branded integrated resort in the Port Campbell area with coastal views towards the 12 Apostles. This would cater for large coach groups and independent touring visitors.</td>
<td></td>
</tr>
<tr>
<td>Geelong Convention and Exhibition Centre including Eastern Beach Spa Complex</td>
<td>$200 million</td>
</tr>
<tr>
<td>Large event facility incorporating 1000 seat auditorium, hotel and spa complex.</td>
<td></td>
</tr>
</tbody>
</table>

*Project costs are estimates based on information available. With further detailed design project costs will need to be re-estimated.

It should be noted that the proposal to develop the Geelong Convention and Exhibition Centre is a project which differs from the other priority projects identified in that it is not directly related to an ‘experience’ suited to the experience seeker market segments, which is identified as a key driver for this project. The project, however, would meet an infrastructure gap identified as part of the infrastructure audit in this report. The project has also been identified as a priority project in Tourism Victoria’s Regional Tourism Action Plan 2009-2012 and the G21 Geelong Regional Plan.

Notwithstanding the lack of a direct link to the preferences of the experience seeker market, for the purposes of this report this project has been identified as a priority project. It is considered that it will facilitate an increase in yield through greater length of stay in the region, increased capacity in the region and will attract new high yield visitor markets to the region. In addition, the project has the potential to provide a significant positive impact on the tourism industry in the region through drawing a significant number of visitors to the region that otherwise would not visit, with the potential for repeat visitation. Pre and post conference touring by delegates provides region-wide tourism benefits from these additional visitors.

### ECONOMIC IMPACT OF PRIORITY PROJECTS

In the short term (construction phase) the eight priority projects will create an estimated 2,796 jobs in the short term and contribute over $1 billion to the State’s GRP. On an annual basis the eight priority projects will collectively contribute 1,900 jobs to Victoria and contribute $700 million to the State’s GRP.

<table>
<thead>
<tr>
<th>Economic Impact of Priority Projects</th>
<th>Short Term (Construction Phase)</th>
<th>Long Term (Operational Phase) Estimated Annual Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Economic Impact</td>
<td>$1.1 billion</td>
<td>$696 million</td>
</tr>
<tr>
<td>Total Employment</td>
<td>2,796</td>
<td>1,901</td>
</tr>
</tbody>
</table>

* Note Economic impact calculations are estimated on information available at writing of the report. When further detailed assessment of projects is undertaken in relation to project costs, the economic impact of projects should be revised.
**Glossary**

**Tourism Product and Infrastructure**
Private and public infrastructure, facilities, services and activities which contribute to the experience of a visitor to a region, such as utilities and roads, attractions, accommodation, assisted and unassisted interpretative and recreational activities, transport, provision of food and beverages, etc.

**Visitor Experience**
This includes:
- Social interactions;
- Meeting and interacting with the locals;
- Experiencing something different from their normal day-to-day life;
- Understanding and learning about different lifestyles and cultures;
- Participating in the lifestyle and experiencing it, rather than observing it;
- Challenging themselves - physically, emotionally and/or mentally;
- Visiting authentic destinations that may not be part of the tourist route;
- Exposure to unique and compelling experiences.

**Experience Seekers**
Experience seekers are visitors who:
- Are experienced international travellers;
- Seek out and enjoy authentic personal experiences they can talk about;
- Involve themselves in holiday activities, are sociable and enjoy engaging with the locals;
- Are active in their pursuits and come away having learnt something;
- Are somewhat adventurous and enjoy a variety of experiences on any single trip;
- Place high importance on value and hence critically balance benefits with costs;
- Place high value on contrasting experiences (i.e. different from their day-to-day lives).

**Great Ocean Road (GOR) Region**
This area includes the municipalities of Geelong, Surf Coast, Queenscliffe, Colac-Otway, Golden Plains, Corangamite, Moyne, Warrnambool and Glenelg.

**Country Victoria**
This refers to all Tourism Regions outside Melbourne as defined by the ABS.

**ABS**
Australian Bureau of Statistics, responsible for national statistics relating to population and industry.

**TRA**
Tourism Research Australia

**NVS**
National Visitor Survey - An Australian wide phone survey of more than 80,000 respondents per year.

**IVS**
International Visitor Survey - A survey of international visitors to Australia conducted in international airport departure lounges Australia wide.
Overnight Visitor
In the NVS an Overnight Visitor is someone who is taking a trip involving a stay away from home for at least one night, at a place at least 40km from home.

Visitor Nights
Visitor Nights refer to the number of nights spent away from home in association with individual visits.

Daytrip visitors
Daytrip visitors are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel.

International Visitors
International Visitors are those who are visiting Australia, and staying away from their home country for less than 12 months.

Average Length of Stay
Average length of stay is expressed in numbers of days and calculated by dividing guest nights by guest arrivals.

Bed Spaces
Three quarter beds are counted as one bed space; double beds as two bed spaces. Cots are excluded.

Capacity
Capacity in terms of Guest Rooms/Units or Bed Spaces is the maximum number available to accommodate paying guests during the survey period.

Accommodation Establishments
The number of Hotels, Motels, Guest Houses and Serviced Apartments within a given area

Guest Arrivals
The total number of paying guests counted on the first night they stayed in the accommodation establishment.

Guest Rooms
The total number of rooms available at each establishment at the end of the survey period for accommodating short term paying guests. Units and apartments within serviced apartments are treated as rooms in these survey results.

Occupancy
Occupancy in terms of room nights refers to the total number of nights each paying guest stayed during the survey period.

Occupancy Rate
Occupancy Rates represents Occupancy expressed as a percentage of total capacity available during the survey period.

Persons Employed
The total number of persons working at each accommodation establishment at the end of the survey period.

Room Nights
Number of rooms physically occupied.

Guest Nights
The number of guests physically staying in the accommodation facility for the particular quarter.

Room Nights Available
The number of Guest Rooms/Units available multiplied by the number of days for which they were available during the survey period. For establishments closing (other than for seasonal reasons) or opening during this period, operating periods only are included.

Small Accommodation Establishments
Accommodation establishments with 5 to 14 rooms.

Large Accommodation Establishments
Accommodation establishments with 15 rooms or more.
**Takings from Accommodation**

Gross revenue from the provision of accommodation, including bed taxes. Takings from meals are excluded. Takings from accommodation for each month generally represent the takings received during that month. Where payments are received in advance of, or after, the provision of accommodation to guests, the monthly figure for takings from accommodation may not necessarily bear direct relationship to the number of guests accommodated during that month.

**Business event**

Business Events is the collective term referring to association conventions, corporate and government meetings, exhibitions and incentive travel reward programs. The event may be as small as 15 business people convening an off-site workshop to solve a problem, through to a large meeting attracting 10,000 delegates. It could involve travel and accommodation for hundreds of corporate incentive participants; or it may be a trade exhibition attracting 5,000 business visitors.
PART A
PROJECT CONTEXT
1. INTRODUCTION

1.1. PROJECT BACKGROUND
As an initiative of the National Long-Term Tourism Strategy, the study was commissioned by the Department of Resources, Energy and Tourism on behalf of the Investment and Regulatory Reform Working Group and in cooperation with Tourism Victoria, Geelong Otway Tourism, and Shipwreck Coast Marketing. Urban Enterprise was appointed in April 2011 to undertake this study for the Great Ocean Road Region which will identify potential areas of opportunity for world class Australian tourism development.

The focus of this study is a ‘whole of region approach’, which means that world class product and infrastructure development opportunities identified will be those which have the greatest regional benefit in terms of filling product and infrastructure gaps for the region or providing the greatest economic benefit for the region. The focus for the study is to identify product and infrastructure suited to higher yielding visitor market segments.

1.2. PROJECT PURPOSE

The purpose of this project is to provide a report which outlines (including quantitative measures where appropriate) the infrastructure and products required to meet anticipated and potential visitor needs over the medium to long term in the Great Ocean Road (the region). The project will include quantitative analysis of the net economic benefit arising from the development of these infrastructure and products.

This project will be based on an understanding of: key visitor markets and segments; key segment preferences in terms of experiences; forecast growth in key visitor markets; and existing and potential experiential strengths of the region. The project will build on existing information in regard to these areas, but where relevant will also be required to fill specific knowledge gaps.

1.3. METHODOLOGY

The study was undertaken through three stages described below:

STAGE 1
Drawing on existing research, identify key higher yielding domestic and international target markets, including quantitative measures, and the experiential preferences of target market segments;

Identify the infrastructure, products and activities required to cater for the experiential preferences of key domestic and international target markets;

Drawing on existing research, identify existing and potential experiential strengths of the region, including but not limited to product requirement surveys, planning, transportation, infrastructure and general growth plans;

Review existing infrastructure and product availability;

Match key target markets with regional experiential strengths.

STAGE 2

Identify 20 year growth forecasts and opportunities from those key visitor markets;

Identify priority products and infrastructure required to realise growth forecasts and opportunities;

Where appropriate identify any region specific impediments to the development of those products;
STAGE 3
Provide an estimate of the net economic benefit arising from the development of these products and infrastructure.

1.4. CONSULTATION
A number of consultation sessions have been undertaken to underpin the project. These sessions have provided input into the product, infrastructure and experience audits and to identify project opportunities and barriers to investment across the region. Consultation has included:

Three workshops in the Great Ocean Road Region with Local Government representatives and Regional Tourism Associations in Warrnambool, Colac and Geelong;

Two workshops with tourism industry and investors in tourism in the Great Ocean Region, in Warrnambool and Geelong;

Roundtable with State Government representatives in Melbourne;

Phone and face to face interviews with various State Government and industry stakeholders through the course of the study.

1.5. GREAT OCEAN ROAD REGION
The Great Ocean Road Region is one of the largest tourism regions in Victoria; it is located in Victoria’s south west and includes the core tourism experiences centred around The Great Ocean Road: The 12 Apostles, Bells Beach, Great Ocean Walk, Geelong Waterfront and Port Phillip Bay, surfing, outdoor adventure, wildlife viewing, Cape Bridgewater and Maritime History. The Region has the largest share of visitors in Victoria.

STATISTICAL TOURISM SUB REGIONS (ABS DEFINED)
The Great Ocean Road Region includes the statistical tourism sub regions of ‘Western’ and ‘Geelong’. These however are not widely used for tourism development and marketing purposes.

The figure below highlights the location of the Geelong and Western Sub Regions in Victoria.

Data for the National Visitor Survey and International Visitor Survey is collated at these sub regions for reporting purposes.
TOURISM SUB REGIONS IN VICTORIA

The diagram below highlights the administrative boundaries within the Great Ocean Road Region. The map following provides a detailed overview of the Great Ocean Road Region. There are two regional tourism associations and 9 Local Government municipalities which make up the Great Ocean Road region.
GREAT OCEAN ROAD REGION OVERVIEW
2. STRATEGIC POLICY CONTEXT

2.1. INTRODUCTION

A literature review has been undertaken to support the study. The literature review draws on a range of strategic tourism plans at the Local, State and Federal Government level. A list of all documents reviewed is included in Appendix A.

The literature review has been undertaken to identify the following:

Policy direction;

Tourism product development gaps and opportunities;

Infrastructure development gaps and opportunities.

2.2. FINDINGS

A number of strategic plans have been prepared by State, Local and Australian Governments which reference the Great Ocean Road Region. The region is one of twelve in Australia which has been identified as a nationally significant landscape and recognised for capturing the essence of Australia for visitors. All levels of strategic policy highlight the importance of the Great Ocean Road region as a Nature Based Tourism destination, which provides iconic experiences directed to a number of experience seeker segments, both from domestic and international markets.

Existing literature, in particular State and Regional strategies highlight product and infrastructure potential which leverages off natural attractions, the coast and touring. The table below summarises the product development and infrastructure priorities identified in the region from existing strategic policy documents. These will form the background for further investigation into product and infrastructure needs and priorities in the Great Ocean Road region.

<table>
<thead>
<tr>
<th>Product Development Opportunities</th>
<th>Infrastructure Development Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indigenous tourism</td>
<td>Great Ocean Road improvements</td>
</tr>
<tr>
<td>Arts, heritage and cultural attraction</td>
<td>Trail infrastructure for the Great Ocean Walk</td>
</tr>
<tr>
<td>Destination dining</td>
<td>Otway Ranges Touring Route</td>
</tr>
<tr>
<td>Waterside dining</td>
<td>Infrastructure and facilities in Great Otway National Park</td>
</tr>
<tr>
<td>Development of the Geelong Cultural Precinct</td>
<td>Transport services between Great Ocean Road towns</td>
</tr>
<tr>
<td>Eastern Beach Mineral Springs Spa Centre</td>
<td>Development of Avalon as an International Airport</td>
</tr>
<tr>
<td>Surf product</td>
<td>Mountain biking in the Otways</td>
</tr>
<tr>
<td>HMAS Canberra as world class dive site</td>
<td>Improvements to the Geelong-Torquay Transport Corridor</td>
</tr>
<tr>
<td>Great Ocean Road Interpretive Centre</td>
<td>Apollo Bay Harbour</td>
</tr>
<tr>
<td>Cruise Shipping</td>
<td>Portland Bay Coastal Infrastructure Plan</td>
</tr>
<tr>
<td>Geothermal bathhouse development at Port Fairy</td>
<td>Trail infrastructure and extension of the Surf Coast Walk</td>
</tr>
<tr>
<td>Ongoing development of Flagstaff Hill</td>
<td>Portarlington Safe Boat Harbour Masterplan</td>
</tr>
<tr>
<td>High quality accommodation</td>
<td>Airfield near Apollo Bay</td>
</tr>
<tr>
<td>Develop Apostles Trail (previously Coast to Craters Trail)</td>
<td>Upgrade Warrnambool Airport</td>
</tr>
<tr>
<td>Development of Warrnambool Golf Course</td>
<td>Upgrade V Line rolling stock and increase services</td>
</tr>
<tr>
<td>Nature based tourism opportunities in the Great Otway NP</td>
<td>Geelong Convention and Exhibition Centre</td>
</tr>
<tr>
<td></td>
<td>Upgrade and development of Tower Hill</td>
</tr>
<tr>
<td></td>
<td>Warrnambool Harbour</td>
</tr>
</tbody>
</table>
2.3. POLICY DIRECTION

The Australian Government supports tourism through the Department of Resources, Energy and Tourism and Tourism Australia. The Government’s 2009 National Long Term Tourism Strategy identifies that in order for Australia to remain competitive in the Global tourism market, continued investment is required to deliver quality sustainable tourism product and services that provide visitors with compelling tourist experiences.

The Great Ocean Road is one of 10 regions in Australia considered as a nationally significant landscape. Australia’s National Landscapes program was developed to provide a long term strategic approach to tourism and conservation to highlight Australia’s most outstanding natural and cultural environments. The program aims to achieve partnerships between tourism and conservation to:

- Promote Australia’s world class, high quality visitor experiences;
- Enhance the value of tourism to regional economies;
- Enhance the role of protected areas in those economies; and
- Build support for protecting our natural and cultural assets.

The Great Ocean Region is promoted internationally by Tourism Australia through the National Landscapes initiative. Five experiences are targeted to international visitors through this initiative, including:

- Waves, bays and beaches;
- Rainforests, mountains and National Parks;
- Wildlife, big and small;
- Great Ocean Hugging journeys;
- Rich Indigenous History.

The Great Ocean Road Region is a key feature in Tourism Victoria’s strategic planning directions. The Nature Based Tourism Strategy highlights the importance of the Great Ocean Road in delivering authentic, memorable experiences to the visitor and identifies a number of tourism infrastructure and product initiatives to achieve this. Other strategies prepared by Tourism Victoria such as the Regional Action Plan highlight Tourism Victoria’s commitment to the Great Ocean Road with $2.1 million in joint funding for promotion of Victoria’s nature based tourism and importantly focus on the Great Ocean Walk.

There is significant strategic policy support at the local and regional level for further development of tourism product and infrastructure in the Great Ocean Road Region which builds on the competitive strengths of the region in nature based tourism. Much of the focus of regional policy is centred on improving visitor experience through the provision of high quality tourism product and infrastructure. Regional planning has evolved significantly in recent years with the formation of G21 [Geelong Regional Alliance] and Great South Coast economic development organisations. These organisations represent Local Government in the Great Ocean Road Region and have worked collaboratively to prioritise major investment projects in the region.

The Great Otway National Park and Otway Forest Park Management Plan prepared by Parks Victoria identifies the importance for providing nature based tourism activities, product and infrastructure for visitors. Key areas of opportunity identified for the park include indigenous tourism, demountable, and nature based accommodation, Great Ocean Walk enhancements, horse riding opportunities, vehicle touring, trail and mountain bike riding, heritage and wildlife tourism. These opportunities will be explored through the course of the study.

---

2.5. PRODUCT DEVELOPMENT PRIORITIES
The following priorities have been identified through existing strategic plans:

2.5.1. WHOLE OF GREAT OCEAN ROAD
- High quality accommodation including nature based accommodation, large scale resort, boutique accommodation and farm stays. There is a large supply of mid-range accommodation throughout the Great Ocean Road, however high-quality accommodation is limited, particularly in the Shipwreck Coast area of the Great Ocean Road;
- Arts, heritage and cultural attraction and product development in small towns. There are a number of smaller townships and settlements throughout the Great Ocean Road Region which are underdeveloped in terms of tourism product, however may present opportunity for art, cultural and heritage tourism which leverages off rural township character;
- Destination dining. There are limited quality dining facilities in the region which are a destination in themselves. There is potential to develop destination dining targeted towards higher yield tourists;
- Waterside dining. Many of the Great Ocean Road townships are located next to the ocean, harbour or bay; however there are very few examples of high quality waterside dining in the region.

2.5.2. GEELONG OTWAY
- Development of the Geelong Cultural Precinct. There is an opportunity to develop the Geelong Cultural Precinct to provide new product and infrastructure targeted to higher yield markets. Project includes the Geelong Performing Arts Centre, Geelong Library and Geelong Heritage Centre;
- Eastern Beach Mineral Springs Spa Centre. There is potential to capitalise on the natural mineral springs at Eastern Beach, through the development of a mineral springs spa centre;
- Geelong Convention and Exhibition Centre. A purpose built centre for conventions and exhibitions is proposed for Geelong. This is proposed to include auditoriums, an exhibition and display area, and a 4-star hotel of at least 200 rooms;
- Surf product. There is potential for surf product development in the Region, building on the strength of Torquay’s surf retail, Bells Beach and enhancement of the Surf World Museum;
- HMAS Canberra as world class dive site. The HMAS Canberra was sunk between Queenscliff and Barwon Heads to be deliberately developed as a dive site. There is potential to further develop the dive through investment in infrastructure, tours and promotion following the resolution of safety issues identified at the site;
- Nature based tourism opportunities throughout Great Otway National Park and Otway Forest.

2.5.3. SHIPWRECK COAST
- Great Ocean Road Interpretive Centre. A major interpretive centre is proposed for Loch Ard Gorge, with significant capacity to accommodate visitors passing through the Port Campbell National Park. This interpretive centre is acknowledged in almost every strategic plan for the region;
- Geothermal bathhouse development at Port Fairy. Port Fairy is well positioned for geothermal spa product. The geothermal water in the town is near to the surface and does not require deep drilling to access the geothermal resource;
- Ongoing development of Flagstaff Hill. Flagstaff Hill Maritime Village is a museum with Australia’s richest shipwreck collection, an 1870’s village located on the state heritage listed and still operating Lady Bay Lighthouse precinct. There is potential to improve the precinct to ensure it meets the needs of growing international markets;
- Indigenous tourism. There is little indigenous tourism product on offer in the region. There is potential to develop this product at Lake Condah and to upgrade tourism infrastructure at Tower Hill.
2.6. INFRASTRUCTURE DEVELOPMENT OPPORTUNITIES

2.6.1. WHOLE OF GREAT OCEAN ROAD

- Great Ocean Road improvements including signage, information bays, coach turnouts for emergency use, and the general quality of the road. The Great Ocean Road is the icon of the Region and provides the key link between townships and tourism product. The infrastructure associated with the Road is need of improvement in order to allow for additional traffic capacity and changing visitor needs;

- Trail infrastructure for the Great Ocean Walk. The Great Ocean Walk is one of the cornerstones of nature based tourism development in the Region. The walk is widely supported by a number of stakeholders. Trail infrastructure and extension is required to complete the walk;

- Otway Ranges Touring Route. There is an opportunity to link together touring throughout the Otway Ranges, away from the Great Ocean Road. This will allow dispersal of visitors to other areas of the region and create demand for new product away from the coast;

- Infrastructure and facilities in Great Otway National Park. The Great Otway National Park was proclaimed in 1998. The Park is extensive and still requires infrastructure improvements to allow for greater visitor capacity and improved experience;

- Transport services between Great Ocean Road towns. There is limited public transport which links destinations along the Great Ocean Road. A transport route which operates along the entire length of the road with stopping points at tourist sites would assist with transporting independent travellers, who are not using vehicles in their travellers. This is important for older segments and backpackers;

- Develop Avalon as an International Airport. There is opportunity to develop Avalon as Victoria’s second international airport. This would have significant benefit for Geelong and the Great Ocean Road region;

- Mountain biking in the Otway’s. Mountain bike trails at Forrest have proven to be very successful; there is opportunity to increase the trail network through the Otway’s;

- Adventure Trails. Develop motorcycle, 4 wheel drive and horse riding trails.

2.6.2. GEELONG OTWAY

- Improvements to the Geelong-Torquay Transport Corridor. There is substantial residential growth in the Geelong-Torquay corridor, which has brought attention to the need to provide formal public transport links in this corridor. This will also provide the opportunity for tourists and holiday home visitors to utilise the infrastructure developed;

- Apollo Bay Harbour. A concept development plan has been prepared for the Apollo Bay Harbour, which builds on the recently completed Marina upgrade. There is potential to further develop tourism product leveraging off the harbour and marina including tours and activities and dining;

- Trail Infrastructure and extension of the Surf Coast Walk. The original Surf Coast Walk (SCW) was developed in 1987 between Jan Juc and Moggs Creek. Over the last twenty years the SCW has subsequently been extended and upgraded. A feasibility study for further improvements to the walk has been completed in 2008. The recommendations of this study should be implemented;

- Airfield near Apollo Bay. The airfield at Apollo Bay provides flights along the Great Ocean Road and to King Island. The capacity and infrastructure at the airport needs to be reviewed to understand infrastructure development required to meet future demand;

- Portarlington Safe Boat Harbour Masterplan. A masterplan has been developed for the Portarlington Safe Harbour. The masterplan identifies significant upgrades to berthing and mooring infrastructure to create greater capacity for leisure craft. There is further tourism potential in the establishment of dining experiences in association with the harbour redevelopment.
2.6.3. **SHIPWRECK COAST**

- **Great Ocean Road Shipwrecks Trail.** The shipwreck trail is a key feature of the Shipwreck Coast sub region. It provides opportunity to disperse visitors throughout the region and build on the regions unique heritage. There is opportunity to improve the interpretation of the Shipwreck Coast;

- **Portland Bay Coastal Infrastructure.** A coastal infrastructure plan has been developed for Portland in 2007;

- **Tower Hill.** Tower Hill is a reserve in Warrnambool which has potential to be further developed to attract visitors interested in Indigenous heritage. The reserve also has abundant wildlife a visitor centre and good infrastructure;

- **Upgrade of Warrnambool Airport.** Warrnambool Regional Airport is owned and operated by the Warrnambool City Council. An upgrade to the airport by lengthening the runway is required to allow for 50 seat passenger aircraft;

- **Upgrade of Warrnambool Harbour.** Staged works are underway to improve the infrastructure and capacity of the Warrnambool Harbour. Further works may be considered which can leverage tourism benefits from the harbour;

- **Upgrade to Flagstaff Hill.** Concept plans are in place for new facilities at Flagstaff Hill including group accommodation.
PART B
VISITOR DEMAND
3. GREAT OCEAN ROAD VISITATION TRENDS

3.1. INTRODUCTION
This section provides trends on visitation to the Great Ocean Road Region with comparisons to the general visitation trends across Australia.

3.2. KEY FINDINGS
TRENDS IN TOURIST VISITATION TO THE GREAT OCEAN ROAD REGION
The Great Ocean Road Region has maintained a consistent market share of Australian visitation over the past 10 years (including domestic and international visitors) at around 3% per annum.

Visitation to the Great Ocean Road Region peaked in 2000, coinciding with the Sydney Olympics. Since the year 2000 the region has maintained visitation between 6.5 and 7.5 million per year.

VISITORS TO THE GREAT OCEAN ROAD REGION 2000–2010

The Great Ocean Road Region has experienced growth in length of stay in all key origin markets. Growth in length of stay is particularly significant for international and interstate visitors. This may reflect improvement in activities and accommodation that have been developed in the region over this period, such as new internationally branded accommodation and new experiences on offer such as the Great Ocean Walk and Otway Fly.

Although visitation has declined over the past decade, the Great Ocean Road has maintained its share of Australia’s visitor expenditure through increased yield. This said recent improvements in tourism product and infrastructure have failed to increase market share in the region.

LENGTH OF STAY – VISITORS TO THE GREAT OCEAN ROAD
3.3. VISITATION

The Great Ocean Road region has maintained a consistent market share of Australian visitation over the past 10 years (including domestic and international visitors).

Visitation to the Great Ocean Road Region peaked in 2000, coinciding with the Sydney Olympics. Since the year 2000 the region has maintained visitation between 6.5 and 7.5 million per year.

**Table 1** VISITATION TO AUSTRALIA AND THE GREAT OCEAN ROAD REGION

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Visitors</th>
<th>Overnight</th>
<th>Daytrip</th>
<th>Total GOR</th>
<th>GOR % of AUST</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>235,235,000</td>
<td>2,636,000</td>
<td>5,756,000</td>
<td>8,392,000</td>
<td>4%</td>
</tr>
<tr>
<td>2001</td>
<td>220,593,000</td>
<td>2,591,000</td>
<td>4,893,000</td>
<td>7,484,000</td>
<td>3%</td>
</tr>
<tr>
<td>2002</td>
<td>217,472,000</td>
<td>2,803,000</td>
<td>4,628,000</td>
<td>7,431,000</td>
<td>3%</td>
</tr>
<tr>
<td>2003</td>
<td>212,681,000</td>
<td>2,597,000</td>
<td>4,709,000</td>
<td>7,306,000</td>
<td>3%</td>
</tr>
<tr>
<td>2004</td>
<td>203,869,000</td>
<td>2,519,000</td>
<td>3,950,000</td>
<td>6,469,000</td>
<td>3%</td>
</tr>
<tr>
<td>2005</td>
<td>200,044,000</td>
<td>2,260,000</td>
<td>4,239,000</td>
<td>6,499,000</td>
<td>3%</td>
</tr>
<tr>
<td>2006</td>
<td>208,028,000</td>
<td>2,403,000</td>
<td>3,976,000</td>
<td>6,379,000</td>
<td>3%</td>
</tr>
<tr>
<td>2007</td>
<td>221,537,000</td>
<td>2,565,000</td>
<td>4,740,000</td>
<td>7,305,000</td>
<td>3%</td>
</tr>
<tr>
<td>2008</td>
<td>206,133,000</td>
<td>2,316,000</td>
<td>4,663,000</td>
<td>6,979,000</td>
<td>3%</td>
</tr>
<tr>
<td>2009</td>
<td>210,470,000</td>
<td>2,169,000</td>
<td>5,110,000</td>
<td>7,279,000</td>
<td>3%</td>
</tr>
<tr>
<td>2010</td>
<td>218,690,000</td>
<td>2,171,000</td>
<td>4,618,000</td>
<td>6,789,000</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Tourism Research Australia, International and National Visitor Survey

3.4. YIELD

Over the past decade the Great Ocean Road Region has maintained its proportion of total visitor expenditure: approximately 4% of International and 3% of domestic tourism expenditure, as shown below. The Great Ocean Road Region has managed to maintain its share of expenditure even though there was an approximately 20% decline in visitation over this period, as shown in Table 1. This confirms that the Great Ocean Road Region has produced higher yields over this period, and has increased the average length of stay, particularly in the interstate and international markets.

This indicates that although there have been improvements to product and infrastructure in the Great Ocean Road region, the region’s static market share indicates they have not been of a scale to create further competitive advantages.

**Table 2** AVERAGE LENGTH OF STAY – OVERNIGHT VISITORS TO THE GREAT OCEAN ROAD REGION (NOMINAL GROWTH)

<table>
<thead>
<tr>
<th>Year</th>
<th>Interstate Overnight</th>
<th>Interstate Overnight</th>
<th>International Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>2.64</td>
<td>3.79</td>
<td>5.53</td>
</tr>
<tr>
<td>2001</td>
<td>2.76</td>
<td>3.24</td>
<td>5.01</td>
</tr>
<tr>
<td>2002</td>
<td>2.66</td>
<td>3.93</td>
<td>6.10</td>
</tr>
<tr>
<td>2003</td>
<td>2.75</td>
<td>3.49</td>
<td>4.95</td>
</tr>
<tr>
<td>2004</td>
<td>2.66</td>
<td>3.29</td>
<td>5.64</td>
</tr>
<tr>
<td>2005</td>
<td>2.79</td>
<td>3.54</td>
<td>6.71</td>
</tr>
<tr>
<td>2006</td>
<td>2.72</td>
<td>3.60</td>
<td>7.30</td>
</tr>
<tr>
<td>2007</td>
<td>3.02</td>
<td>3.55</td>
<td>5.49</td>
</tr>
<tr>
<td>2008</td>
<td>2.66</td>
<td>4.09</td>
<td>6.49</td>
</tr>
<tr>
<td>2009</td>
<td>3.02</td>
<td>3.87</td>
<td>7.91</td>
</tr>
<tr>
<td>Year</td>
<td>Australia</td>
<td>Great Ocean Road Region</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-----------</td>
<td>-------------------------</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>$129.40</td>
<td>$180.25</td>
<td></td>
</tr>
<tr>
<td>2001</td>
<td>$156.16</td>
<td>$149.54</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>$168.81</td>
<td>$149.16</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>$151.29</td>
<td>$146.70</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>$148.84</td>
<td>$143.31</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>$155.74</td>
<td>$232.73</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>$162.32</td>
<td>$146.99</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>$171.27</td>
<td>$170.81</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>$186.38</td>
<td>$165.78</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>$178.08</td>
<td>$150.53</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>$172.02</td>
<td>$212.64</td>
<td></td>
</tr>
</tbody>
</table>

Average annual growth: 2.9% 1.7%

Source: Tourism Research Australia, International and National Visitor Survey

### TABLE 4  TOTAL EXPENDITURE INTERNATIONAL AND DOMESTIC OVERNIGHT VISITORS [NOMINAL GROWTH]

<table>
<thead>
<tr>
<th>Year</th>
<th>Australia International</th>
<th>Domestic</th>
<th>GOR International</th>
<th>Domestic</th>
<th>%GOR International</th>
<th>Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>$10,071,359,000</td>
<td>$37,962,476,000</td>
<td>$442,545,000</td>
<td>$1,283,352,000</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>2001</td>
<td>$10,976,502,000</td>
<td>$45,232,190,000</td>
<td>$615,325,000</td>
<td>$1,101,972,000</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>2002</td>
<td>$11,538,910,000</td>
<td>$50,417,065,000</td>
<td>$507,142,000</td>
<td>$1,093,919,000</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2003</td>
<td>$11,170,779,000</td>
<td>$44,495,835,000</td>
<td>$568,292,000</td>
<td>$1,177,971,000</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>2004</td>
<td>$11,788,399,000</td>
<td>$44,187,384,000</td>
<td>$644,698,000</td>
<td>$1,067,779,000</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>2005</td>
<td>$12,167,117,000</td>
<td>$42,962,900,000</td>
<td>$474,298,000</td>
<td>$1,618,649,000</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>2006</td>
<td>$13,961,277,000</td>
<td>$46,369,888,000</td>
<td>$499,309,000</td>
<td>$969,277,000</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2007</td>
<td>$15,384,211,000</td>
<td>$49,428,579,000</td>
<td>$614,766,000</td>
<td>$1,181,125,000</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2008</td>
<td>$16,306,000,000</td>
<td>$47,838,803,000</td>
<td>$613,398,000</td>
<td>$1,160,794,000</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2009</td>
<td>$17,145,557,000</td>
<td>$46,218,713,000</td>
<td>$702,648,000</td>
<td>$1,202,432,000</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>2010</td>
<td>$17,825,791,000</td>
<td>$47,556,038,000</td>
<td>$668,701,000</td>
<td>$1,462,560,000</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: CD Mota, Tourism Research Australia, International and National Visitor Survey
4. Market Segmentation Analysis

4.1. Introduction
This section focuses on an assessment of international and domestic visitor market segments. A number of market segments typologies were considered at the commencement of this study, however through consultation with Tourism Australia and Tourism Victoria, the following segmentation has been analysed with respect to this study:

- International markets: Tourism Australia Experience Seeker Segments;
- Domestic markets: Roy Morgan Values Segments.

4.2. Key Findings
Urban Enterprise considered a number of market segment typologies at the commencement of this study for analysis. Through consultation with Tourism Australia and Tourism Victoria, the following segmentation has been analysed with respect to understanding market preferences for product and experiences in Australia and the Great Ocean Road Region. These segments are considered to be higher yielding and will form an area of focus for product development and destination marketing.

International visitor markets (derived from Tourism Australia Experience Seeker Segments):
- United Kingdom experience seekers;
- Chinese experience seekers;
- German experience seekers;
- Japanese experience seekers;
- American (USA) experience seekers;
- New Zealand experience seekers;
- Indian experience seekers.

Domestic visitor markets (derived from Roy Morgan Values Segments):
- Visible Achievement;
- Socially Aware;
- Traditional Family Life;
- Young Optimism.

The Melbourne short break market is also considered important for the Great Ocean Road region and is represented by the four domestic visitor segments identified above.

Other Roy Morgan Values Segments such as ‘Conventional Family Life’ and ‘Look at Me’ are important traveller markets and may be considered, however these are seen as secondary markets to the Great Ocean Road region product audit project, for example ‘Conventional Family Life’ is a lower yielding market and holiday preferences for ‘Look at Me’ are not matched well to the nature based strengths of the region.
There were 2.7 million experience seekers who visited Australia in 2010. Of these 10% or 260,000 visited the Great Ocean Road Region. The Great Ocean Road region attracted a higher proportion of experience seekers from other Europe, United Kingdom, Germany and China. The Great Ocean Road region, however, has an under-representation in experience seekers from New Zealand, Indonesia, Singapore and Japan, of which both Japan and New Zealand are considered key experience seeker markets for Australia. The reason for this is partly due to the product and experience availability in the Great Ocean Road Region, not meeting market segments preferences. For instance, data from the International Visitor Survey highlights that Japanese visitors have a low preference for nature based tourism. The Indian experience seeker market is in its infancy and visitation to the Great Ocean Road Region is currently low (around 3%); however expectations are that this segment will grow significantly over time.

The key experience seeker preferences which overlap across all of the key origin markets include:

**PRIMARY PREFERRED EXPERIENCES**

- Food and wine experience. Overwhelmingly, this is the number one preference for experience seekers and is identified as a preferred activity by all key origin markets.
- Nature based experience. This is the second most common preference for experience seekers from all origin markets and is a key preference for all markets identified except Japan.
- Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

**SECONDARY PREFERRED EXPERIENCES**

- Festivals and events. German, British and American experience seekers had a preference for attending festivals and events.
- Walking experience. German and American experience seekers had a preference for a walking experience, however this was not matched by other markets.

**ACCOMMODATION PREFERENCES**

- The accommodation preferences for international experience seekers varies significantly by market and highlights the need to provide a variety of accommodation options to meet the experience seeker market demand. Preferences include budget hotels, 4/5 star hotels, guest houses/B&Bs and self-contained accommodation and Tourist Parks.
# Note the remaining 23% of visitors are spread across a six other segments which are less important for tourism due to low travel preferences.

The key Roy Morgan Market Values Segments identified for domestic markets are Visible Achievement, Socially Aware, Traditional Family Life and Young Optimism. These segments contribute around 77% of domestic visitors in Australia. Out of these, the key targets for tourism are Visible Achievement and Socially Aware, these segments are more likely to seek out unique experiences and spend more when visiting.

In terms of holiday preferences the following experiences are important to the Visible Achievement and Socially Aware segments:

- Food and wine experience;
- Nature based tourism experience;
- Wildlife experience.

The Great Ocean Road Region attracts high proportions of Visible Achievement and Socially Aware segments, highlighting a good match between product and experience supply and market preferences for these segments.

## 4.3. INTERNATIONAL MARKET SEGMENTS

### 4.3.1. OVERVIEW AND DEFINITION OF INTERNATIONAL EXPERIENCE SEEKER MARKET

Tourism Australia has identified Experience Seekers as its target market: this group represents up to 50% of possible long distance travellers leaving from Australia’s major inbound tourism markets. Tourism Australia identifies Experience Seekers as likely to include people who:

- Are experienced international travellers;
- Seek out and enjoy authentic personal experiences they can talk about;
- Involve themselves in holiday activities, are sociable and enjoy engaging with the locals;
- Are active in their pursuits and come away having learnt something;
- Are somewhat adventurous and enjoy a variety of experiences on any single trip;
- Place high importance on value and hence critically balance benefits with costs;
- Place high value on contrasting experiences (i.e. different from their day-to-day lives);
- Experience seekers:
- Come from households that have higher than average household income;
- Are tertiary educated;
Are open-minded and have an interest in world affairs;
Are selective about their media consumption;
Are opinion leaders within their peer and social groups;
Are not characterised by nationality, preferred holiday style/mode or age;

The following countries have been profiled by Tourism Australia in terms of their experience seeker markets:
- United Kingdom;
- China;
- Germany;
- Japan;
- United States of America;
- New Zealand.

Our report will also analyse the Indian experience seeker market where possible, however data and analysis for this segment is not as well developed as other experience seeker segments, due to the small size of the market currently. However it is expected that this market will grow in scale in coming years.

The following provides detail on holiday preferences for each of these international experience seeker markets:

**CHINESE EXPERIENCE SEEKERS**
Chinese experience seekers are more likely to plan their holiday around the following:
- Sampling local cuisine;
- Shopping;
- Nature;
- The beach and
- Visiting friends and family.
- Once at the destination they are more likely to:
- Eat at restaurants;
- Get to know the locals;
- Go shopping at local markets;
- Attend live theatre; and
- Visit friends and family.

Chinese experience seekers are likely to stay in 2/3 star and 4/5 star hotels. They are also more likely to stay with friends and relatives than other long haul travellers.

**GERMAN EXPERIENCE SEEKERS**
German experience seekers are more likely to plan their holiday around:
- Food & wine,
- Cultural events;
- Walking;
- Shopping;
- Photography;
- Nature;
• Museums.

Further to this, once at the destination they are more likely to:
• Eat at restaurants;
• Get to know the locals;
• Learn about the native (indigenous) culture;
• Explore the backstreets; and
• Self-drive throughout the region.

German experience seekers are more likely to stay in rented accommodation (such as villas, apartments, cottages, etc.) or guest houses. They are less likely to stay in hotels.

JAPANESE EXPERIENCE SEEKERS

Are more likely to plan their holiday around:
• Enjoying the local food and wine;
• Purchasing local products;
• Visit famous landmarks;
• Explore the backstreets;
• Go on guided tours;
• Spend time with their family.

Japanese experience seekers are more likely to stay in budget hotels or with friends.

UNITED KINGDOM EXPERIENCE SEEKERS

Are more likely to plan their holiday around:
• Food & wine;
• Walking;
• Shopping;
• Cultural events or festivals;
• Nature;
• Once at the destination they are more likely:
• To eat at restaurants;
• Get to know the locals;
• Explore the backstreets and nightlife;
• Travel throughout the region and visit famous landmarks.

Accommodation among this segment included 1, 2 or 3 star hotels and Bed and Breakfasts. They are less likely to stay at a resort.

UNITED STATES OF AMERICA EXPERIENCE SEEKERS

American experience seekers are likely to plan their holiday around:
• Visiting historic sites;
• Events or festivals;
• Native culture;
• Sightseeing;
• Nature;
• Food & wine.

Once at the destination they are likely to want to get to know the locals and their culture.

American experience seekers are more likely to stay bed and breakfasts.

NEW ZEALAND EXPERIENCE SEEKERS

When considering the types of holidays they partake in, Australia is best placed to compete by offering experiences to fulfill beach holidays and touring holidays (1-3 weeks touring, mostly by car).

New Zealand experience seekers have a preference for nature based tourism activities and history and heritage.

In terms of accommodation standard 3-4 quality accommodation is preferred for this experience seeker group.

INDIAN EXPERIENCE SEEKERS

There is no experience seeker profile prepared by Tourism Australia that is currently available; however an assessment of raw data in terms of activities and accommodation preferences reveals the following trends for the Indian experience seeker market:

Activity preferences:
• Eat out / dine at a restaurant/café;
• Go shopping;
• Sightseeing;
• Go to the beach;
• Go to markets.

Accommodation preferences:
• Rented house / apartment / unit / flat;
• Luxury hotel/serviced apartment/resort;
• Standard hotel/motel/motor inn.

The Indian experience seeker market is small by contrast to other experience seeker markets, and as such the sample size is not suitable for quantifying at the Great Ocean Road level.
4.3.2. AUSTRALIAN AND GREAT OCEAN ROAD SEGMENTATION

NUMBER OF INTERNATIONAL EXPERIENCE SEEKER VISITORS TO GREAT OCEAN ROAD REGION

The table below shows an overview of international experience seekers by country of origin in 2010. In 2010, 2.7 million visitors to Australia were classified as ‘experience seekers’. Of the 2.7 million experience seekers to Australia, 260,000 visited the Great Ocean Road region.

The Great Ocean Road region received the highest number of experience seekers from Other Europe in 2010 (58,414 visitors), followed by the United Kingdom. The Great Ocean Road region captured the largest proportion of experience seekers from the German market to Australia in 2010 (23%), followed by Other Europe (18%) and the Chinese market (17%). The Great Ocean Road Region captures a very small proportion of experience seekers from New Zealand (3%), Japan (4%), Indonesia (3%) and Singapore (6%).

This market strength can be attributed to the unique coastal vistas and the experiences on offer, such as walks, cycling and activities associated with the beaches. There is opportunity for growth in a number of markets, particularly those which have preferences for nature based tourism.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Experience Visitors 2010</th>
<th>GOR Capture (%) of AUST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Europe</td>
<td>330,417</td>
<td>58,414</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>378,355</td>
<td>43,097</td>
</tr>
<tr>
<td>Germany</td>
<td>112,551</td>
<td>25,593</td>
</tr>
<tr>
<td>USA</td>
<td>253,912</td>
<td>22,938</td>
</tr>
<tr>
<td>China</td>
<td>98,456</td>
<td>16,563</td>
</tr>
<tr>
<td>Other Countries</td>
<td>210,607</td>
<td>14,554</td>
</tr>
<tr>
<td>New Zealand</td>
<td>556,779</td>
<td>12,399</td>
</tr>
<tr>
<td>Other Asia</td>
<td>107,222</td>
<td>11,355</td>
</tr>
<tr>
<td>Canada</td>
<td>68,206</td>
<td>8,761</td>
</tr>
<tr>
<td>Malaysia</td>
<td>84,662</td>
<td>8,278</td>
</tr>
<tr>
<td>Korea</td>
<td>85,017</td>
<td>7,602</td>
</tr>
<tr>
<td>Singapore</td>
<td>117,269</td>
<td>7,439</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>61,177</td>
<td>6,756</td>
</tr>
<tr>
<td>Japan</td>
<td>124,424</td>
<td>4,955</td>
</tr>
<tr>
<td>Thailand</td>
<td>38,584</td>
<td>4,448</td>
</tr>
<tr>
<td>Taiwan</td>
<td>21,609</td>
<td>2,353</td>
</tr>
<tr>
<td>Indonesia</td>
<td>47,065</td>
<td>1,593</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,696,311</strong></td>
<td><strong>257,098</strong></td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
The table below shows the proportion of international visitors to Australia and the Great Ocean Road were experience seekers by country of origin in 2010.

53% of visitors to the Great Ocean Road were experience seekers in 2010. This is slightly higher than the national average (50%).

73% of German visitors to Great Ocean Road were experience seekers in 2010, the highest proportion of all international markets to the region. This is followed by Other Europe (68%) and the United Kingdom (63%).

The Great Ocean Road had a higher proportion of experience seekers from Japan (51%) than Australia (34%) in 2010.

<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>% of Total AUST Visitors</th>
<th>% of Total GOR Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td>Other Europe</td>
<td>67%</td>
<td>68%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>62%</td>
<td>63%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td>USA</td>
<td>58%</td>
<td>60%</td>
</tr>
<tr>
<td>Other Countries</td>
<td>52%</td>
<td>60%</td>
</tr>
<tr>
<td>Canada</td>
<td>59%</td>
<td>57%</td>
</tr>
<tr>
<td>Thailand</td>
<td>49%</td>
<td>54%</td>
</tr>
<tr>
<td>Japan</td>
<td>34%</td>
<td>51%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>42%</td>
<td>48%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>41%</td>
<td>45%</td>
</tr>
<tr>
<td>Korea</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Singapore</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Other Asia</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>China</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>50%</strong></td>
<td><strong>53%</strong></td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
AGE OF EXPERIENCE SEEKERS

The figure below compares the age group of experience seekers to Australia and the Great Ocean Road region in 2010.

Over half of the experience seekers to the Great Ocean Road region were adults aged between 20 years and 34 years in 2010. A further 28% were aged between 35 years and 54 years.

When compared with Australia, the Great Ocean Road region tended to attract a higher proportion of experience seekers aged between 20 years and 34 years. The Great Ocean Road region attracted a lower proportion of experience seekers aged 35 years and over than Australia.

TABLE 7 EXPERIENCE SEEKERS AGE GROUP – AUSTRALIA AND GREAT OCEAN ROAD REGION

TRAVEL PARTY

In comparison to Australian averages, the Great Ocean Road region attracts a slightly lower proportion of the two major travel party types combined: unaccompanied travellers and adult couples. These two types of travel party represent 82% of travel parties coming to Australia, but 80% of the parties visiting the Great Ocean Road.

TABLE 8 TRAVEL PARTY, JAPAN, CHINA AND TOTAL ALL COUNTRIES, 2010

Source: IVS, CD-MOTA

* Note: Sample size for China is not sufficient to present data for the figure above.
TABLE 9  TRAVEL PARTY, NEW ZEALAND, USA, UK AND GERMANY, 2010

- Unaccompanied traveller
- Adult couple
- Family group
- Friends and/or relatives
- Business associates

LENGTH OF STAY

Experience seekers from the United Kingdom, stay longer than other key international segments (8.5 nights) in the Great Ocean Road Region. Visitors from China and Germany have a significantly shorter length of stay in the Great Ocean Road region. Australian visitors who visit the Great Ocean Road spend 21% of their visit in the Great Ocean Road region.

TABLE 10  AVERAGE LENGTH OF STAY, 2010

Source: IVS, CD-MOTA
German experience seeker segments spend significantly more in the Great Ocean Road region than other visitors ($529 per person per night). Visitors from China spend the lowest of key international experience seeker markets ($207). The expenditure may reflect the match of product and experience supply with visitor preferences.

Visitors to the Great Ocean Road spend significantly more on petrol and group tours, but less on shopping and conventions/conferences. As a tourist attraction stretching for 243km, the Great Ocean Road is best experienced by car or organised tour, which accounts for the greater expenditure on these items. It is to be expected that shopping and conferences would generate less expenditure than average, as by their nature they are predominantly metropolitan tourism experiences.

**TABLE 11 EXPERIENCE SEEKERS AVERAGE EXPENDITURE PER PERSON PER NIGHT, 2010 – GREAT OCEAN ROAD REGION**

<table>
<thead>
<tr>
<th>Expenditure Items</th>
<th>GOR New Zealand</th>
<th>GOR China</th>
<th>GOR United Kingdom</th>
<th>GOR Germany</th>
<th>Total All Countries</th>
<th>% of Total Spend</th>
<th>% of Total Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group tours</td>
<td>$3.97</td>
<td>$1.34</td>
<td>$12.95</td>
<td>$16.14</td>
<td>$10.04</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Petrol and oil costs</td>
<td>$21.31</td>
<td>$14.49</td>
<td>$15.03</td>
<td>$12.90</td>
<td>$12.97</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Public transport</td>
<td>$7.84</td>
<td>$7.99</td>
<td>$6.21</td>
<td>$9.55</td>
<td>$20.41</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>$118.62</td>
<td>$26.41</td>
<td>$70.01</td>
<td>$63.74</td>
<td>$167.70</td>
<td>31%</td>
<td>33%</td>
</tr>
<tr>
<td>Food and drink</td>
<td>$76.68</td>
<td>N/A</td>
<td>N/A</td>
<td>$87.82</td>
<td>$143.98</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Shopping</td>
<td>$51.46</td>
<td>$57.17</td>
<td>$30.34</td>
<td>$24.43</td>
<td>$45.37</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$8.45</td>
<td>$5.22</td>
<td>$7.77</td>
<td>$9.68</td>
<td>$15.41</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Other expenditure</td>
<td>$2.84</td>
<td>$13.99</td>
<td>$7.61</td>
<td>$7.85</td>
<td>$19.97</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Convention/Conferences</td>
<td>$2.60</td>
<td>$-</td>
<td>$1.94</td>
<td>$-</td>
<td>$1.55</td>
<td>0.2%</td>
<td>1%</td>
</tr>
<tr>
<td>Total $ per person per night</td>
<td>$293.77</td>
<td>$165.89</td>
<td>$207.99</td>
<td>$232.11</td>
<td>$529.44</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
ACCOMMODATION

Hotel, resort, motel and motor inns are the most commonly used accommodation in the Great Ocean Road Region (57%); this is followed by Backpacker accommodation (35%). Key differences between Great Ocean Road Visitors and Australia visitors are:

- More Great Ocean Road region visitors stay in Backpackers;
- More Great Ocean Road region visitors stay in Caravan Parks;
- More Great Ocean Road region visitors stay in B&Bs;
- Less Great Ocean Road visitors stay in Motels, Hotels and resorts.

<table>
<thead>
<tr>
<th>% of Visitors from Country of Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Hotel, resort, motel, motor Inn</th>
<th>Backpacker / hostel</th>
<th>Caravan</th>
<th>Home of friend or relative</th>
<th>Hotel, guest house / Bed and Breakfast</th>
<th>Own property</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aust</td>
<td>10%</td>
<td>10%</td>
<td>20%</td>
<td>15%</td>
<td>20%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Japan</td>
<td>5%</td>
<td>5%</td>
<td>15%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>GOR</td>
<td>5%</td>
<td>5%</td>
<td>15%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
### TABLE 13  ACCOMMODATION, NEW ZEALAND, USA, UK, GERMANY AND TOTAL ALL COUNTRIES, 2010

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Visitors from Country of Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
</tbody>
</table>

**ACTIVITIES/EXPERIENCES**

Experience seekers who visit the Great Ocean Road Region generally participate in a much greater number of activities than the average experience seekers to Australia. This highlights the high number of existing activities that can be undertaken across the region.

Key areas of preference for international experience seekers are identified below. For detailed analysis of each international segment activities see Appendix C.

- Eating out;
- Sightseeing;
- Shopping; and
- Going to the beach.

Source: IVS, CD-MOTA
4.4. DOMESTIC VISITOR SEGMENTS

4.4.1. OVERVIEW AND DEFINITION OF ROY MORGAN VALUES SEGMENTS

Tourism Victoria have identified four key Values Segments for visitation to Victoria: these Values Segments, and the following analysis, is based on research undertaken by Roy Morgan Research. The four Values Segments are:

- Socially Aware;
- Visible Achievers;
- Young Optimists; and
- Traditional Family Life.

In 2008 these four market segments accounted for 72% of interstate trips to Victoria, and 68% of trips within Victoria. These segments also provide a high yield per visitor, as they comprise 4 of the top six yielding market segments (there are 10 segments in total).

Other segments which have been considered include ‘Look at Me’ and ‘Conventional Family Life’. Whilst these segments are considered key holiday segments they have not been reviewed in detail for the following reasons:

- Look at me, whilst a high yielding segment does not have a strong preferences match for the Great Ocean Road Region. i.e.: preferences for nature based activities are low for this segment;
- Conventional Family Life, whilst a large visitor group is a low yielding segment and given the focus of this study is on higher yield segments it will not be reviewed in detail for this project.

<table>
<thead>
<tr>
<th>TABLE 14 VALUES SEGMENTS DATA SUMMARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Values Segment</td>
</tr>
<tr>
<td>-------------------------</td>
</tr>
<tr>
<td>Socially Aware</td>
</tr>
<tr>
<td>Visible Achievement</td>
</tr>
<tr>
<td>Young Optimism</td>
</tr>
<tr>
<td>Traditional Family Life</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Source: Roy Morgan Research - Tourism Victoria Values Segments

SOCIALLY AWARE

PROFILE

People in the Socially Aware segment are generally well-educated, socially active, and community minded. They are astute, technologically up to date, like to be trend setters, and are better communicators than the general population.

The Socially Aware segment is predominantly comprised of people of high socio-economic status, with 62% in the top quintile, and another 24.4% in the second quintile. The Socially Aware are regular holiday makers, with 81.3% taking some kind of trip in 2008, the highest percentage of any of the segments. Not only are they regular travellers, they present a high yield, with an average spend per person of $2,191 per trip.

PREFERENCES

The Socially Aware segment includes the Great Ocean Road in its top 10 preferred destinations; for Australian destinations, only Melbourne, Sydney and the Blue Mountains.
were ranked higher. The Great Ocean Road also appears on their top 10 actual trip destinations for 2008. Approximately 7% of respondents indicated that they would like to visit the Great Ocean Road in the following 12 months, a rate approximately 20% higher than the average.

The top 4 most frequent holiday activities undertaken by the Socially Aware are food and wine experiences, National Parks, swimming and surfing, and countryside and wildlife. These activities are in accordance with the Great Ocean Road tourism product.

**ATTITUDES**

When surveyed, the Socially Aware indicated a preference for ecotourism, for opportunities to experience local cultures, and for weekend trips away: this substantiates the view that the Great Ocean Road will appeal to this market segment. They also expressed a dislike for doing as little as possible on holiday, and for bright lights and big cities when they travel.

**VISIBLE ACHIEVEMENT**

**PROFILE**

The Visible Achievement market segment is associated with people living in affluent suburbs, have conservative values, and are successful. They want to be powerful, are time conscious, and seek success, praise and attention.

The Visible Achievement segment is skewed towards high socio-economic status, with approximately 78% of these people being in the top two quintiles. Visible Achievers are regular holiday makers, with 80% of them undertaking travel in the 12 months preceding the survey. Visible Achievers are also large spenders when on holiday, with an average yield of $2,360 per person per trip.

**PREFERENCES**

Although Visible Achievers rated the Great Ocean Road as its second-most preferred Australian destination behind Melbourne, it did not appear in their actual top 10 holiday destinations for the 12 months preceding the survey.

The Visible Achievement segment survey indicates a strong preference for rest and relaxation on holiday, with 55% of trips including this as an activity. Other frequently occurring holiday activities include:

- Restaurants, food and wine;
- Country, wildlife and scenery;
- Beach holidays;
- National parks and forests; and
- Swimming and surfing.

**ATTITUDES**

When surveyed, Visible Achievers expressed preferences for holidaying away from the cities and crowds, to be able to experience local culture, and to go away on weekends. They do not consider environmental policies when selecting accommodation, and do not want an ecotourism experience.

**YOUNG OPTIMISM**

**PROFILE**

The Young Optimism segment is typified by a desire to improve their prospects, with regards to their career, their position within the community, and their life in general. They are concerned with building relationships, their physical wellbeing and with being up-to-date. Young Optimists represent a small section of the community: 7% of people over 14 years of age.

Young Optimists are concentrated in the middle two quintiles with regards to their socio-economic status, with 64% of respondents in the second and third quintiles. People within the Young Optimism segment are regular travellers: approximately 70% of those surveyed have travelled in the preceding 12 months. When travelling, people within the Young Optimism segment present a reasonable yield, with an average spend of $1,961.
**PREFERENCES**

Young Optimists like to be challenged when travelling. They have a strong preference for overseas holidays, but holiday within Australia with a frequency in line with the population average. The Great Ocean Road does not appear on their top 10 preferred travel destinations, but does on their top 10 actual places visited. Their most frequent holiday activities include:

- Shopping;
- Surfing, swimming;
- Cities; and,
- Discos and nightlife.

Just under 25% of the Young Optimists indicated they had been swimming or surfing on their last holiday.

**ATTITUDES**

The Young Optimism segment looks for bright lights and big cities on their holidays, and like their trips to be organised for them. They are not looking for nature based tourism, and like to be active, and look for crowds.

**TRADITIONAL FAMILY LIFE**

**PROFILE**

The typical person within this market segment is over 50 years old, an empty nester, and is close to or has reached retirement age. They are family centric, and are focused on their children and grandchildren.

The Traditional Family Life segment is predominantly populated with people from the lower end of the socio-economic spectrum: 72% of respondents were in the bottom 2 socio-economic quintiles. 63.8% of people within this segment had travelled in the previous year, and holiday makers from this segment present a significant average yield of $2,389.

**PREFERENCES**

The Great Ocean Road was the fourth most preferred destination in the survey, and the 10th most visited destination. People within the Traditional Family Life segment reported that their most regular holiday activity was visiting family and friends. Other popular activities include:

- Meeting and mixing with other people;
- Historical places;
- Country wildlife and scenery; and,
- Gardens and parks.

**ATTITUDES**

Traditional Family Life tourists expressed preferences for accommodation with environmental policies, to be in a natural setting, to experience local culture, and to do as little as possible when on holiday. This market segment does not like to go away on weekends, is not looking for city experiences, and is not looking to be active while away.
4.4.2. AUSTRALIAN AND GREAT OCEAN ROAD SEGMENTATION

% OF AUSTRALIANS, VICTORIANS AND VISITORS TO THE GREAT OCEAN ROAD BY VALUE SEGMENT

The Great Ocean Road attracts a higher representation from Visible Achievement and Socially Aware, however a lower representation in Traditional Family Life than the average Victorian and Australian populations. The proportion of visitors classified as “Young Optimism” is the same for both Australia and GOR Region.

TABLE 15 DOMESTIC OVERNIGHT VISITORS TO GREAT OCEAN ROAD, REGIONAL VICTORIA AND PROPORTION OF AUSTRALIA POPULATION BY ROY MORGAN VALUE SEGMENTS 2010

% of Total Visitors

Source: Great Ocean Road Market Profile Year Ending December 2010, Tourism Victoria & Roy Morgan Value Segments.

INTRASTATE TRIPS TO VICTORIA BY ROY MORGAN VALUES SEGMENT

Visible Achievement, Socially Aware and Traditional Family Life segments contribute 68% of all intrastate trips in Victoria.

TABLE 16 INTRASTATE TRIPS TO VICTORIA BY ROY MORGAN VALUE SEGMENTS, 2008

% of Total Visitors

Source: Roy Morgan Value Segments, Tourism Victoria & Roy Morgan Research, 2008
INTERSTATE TRIPS TO VICTORIA BY VALUE SEGMENT

Visible Achievement, Socially Aware and Traditional Family Life contribute 70% of all interstate trips to Victoria.

TABLE 17  INTERSTATE TRIPS TO VICTORIA BY ROY MORGAN VALUE SEGMENTS, 2008

% of Total Visitors

<table>
<thead>
<tr>
<th>Segment</th>
<th>% of Total Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visible Achievement</td>
<td>23%</td>
</tr>
<tr>
<td>Socially Aware</td>
<td>21%</td>
</tr>
<tr>
<td>Traditional Family Life</td>
<td>19%</td>
</tr>
<tr>
<td>Young Optimism</td>
<td>9%</td>
</tr>
<tr>
<td>Conventional Family Life</td>
<td>10%</td>
</tr>
<tr>
<td>Look At Me</td>
<td>10%</td>
</tr>
<tr>
<td>Something Better</td>
<td>4%</td>
</tr>
<tr>
<td>Real Conservatism</td>
<td>4%</td>
</tr>
<tr>
<td>Fairer Deal</td>
<td>1%</td>
</tr>
<tr>
<td>Basic Needs</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan Value Segments, Tourism Victoria & Roy Morgan Research, 2008

EXPENDITURE

Socially Aware, Visible Achievement, Traditional Family Life and Look at Me are the largest spending segments when on holiday. The first three of which are key segments for the Great Ocean Road Region. This demonstrates great potential to extract higher yield from visitation to the Great Ocean Road region, with the right product mix.

TABLE 18  AVERAGE EXPENDITURE PER PERSON PER TRIP BY ROY MORGAN VALUE SEGMENTS, AUSTRALIA, 2008

Spend per travel party per trip ($)

Source: Roy Morgan Value Segments, Tourism Victoria & Roy Morgan Research, 2008
5. **Forecast Visitation for Great Ocean Road**

5.1. **Introduction**

This section provides a 20-year forecast of visitation to the Great Ocean Road Region, modelled from Australian Tourism Forecast Committee methodologies (see methodology section below for more detail). Projected visitation will impact on demand for accommodation, infrastructure and attractions.

5.2. **Key Findings**

**Forecast Growth in the Great Ocean Road Region**

Projected forecasts of visitation show that the Great Ocean Road Region will attract between 9.6 million and 10.5 million visitors by 2030. At a minimum this is growth of 2.4 million on existing visitation levels.

<table>
<thead>
<tr>
<th>Year</th>
<th>2030 Low-Base Growth Scenario</th>
<th>2030 Medium Growth Scenario</th>
<th>2030 High Growth Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>7.2 Million</td>
<td>9.6 Million</td>
<td>9.7 Million</td>
</tr>
<tr>
<td>2030</td>
<td>10.5 Million</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**International Visitor Forecast**

Using the low base case scenario, international visitors to the Great Ocean Road region are forecast to increase at 3.9% per annum from 2010-2030. This equates to an additional 560,000 international visitors to the Great Ocean Road Region by 2030 (more than double the existing visitation). The experience seeker markets that are projected to grow most in percentage terms are:

- India (8.9%);
- China (8.5%);
- Continental Europe (4.1%);
- USA (3.1%).

By 2030, Continental Europe will have secured its place as the most important international experience seeker market and China will become the 2nd most important international experience seeker market in terms of total visitors to the Great Ocean Road region over the next 20 years.

**Projected Growth in International Experience Seeker Segments**

**Domestic Visitor Forecast**

Using the base case scenario, domestic visitation is projected to increase by 1.7 million visitors between 2010-2030.

The key markets that are projected to grow the most by percentage increase are:
- Traditional Family Life (2.3%);
- Socially Aware (1.1%).

**PROJECTED GROWTH KEY DOMESTIC SEGMENTS**

- Up to 4 large resorts of 4.5 star standard;
- Up to 5 new large backpacker hostels;
- Up to 5 new caravan or tourist parks;
- Up to 12 new hotels/motels of various scale and star rating including budget and also 5 star with international branding;
- Up to 50 Guest houses and B&Bs;
- Self-contained apartments and houses across the region.

Some of the projected requirement for additional capacity should be directed to existing accommodation establishments. Increase to the size of existing establishments would improve economies of scale for businesses and also provide refreshed and contemporary accommodation to meet market expectations.

**TRANSPORT**

Transport links will need to accommodate the forecast growth in visitation. The following strategies are considered critical to provide for long term growth:
- Princes Highway duplication to Colac;
- Continuous improvement of safety and road quality including shoulder sealing, ongoing maintenance, and resealing sections on the Great Ocean Road and associated link roads.
- Additional rail services and new rolling stock to cater for visitors travelling by train;
- Air services to international markets through Avalon Airport.

**ATTRACTIONS**

An additional 2.4 million visitors (base case scenario) will have a significant impact on attractions in the region. Capacity and infrastructure at existing attractions will need to be upgraded to support forecast demand, whilst new attractions suited to key visitor markets should also be considered in the region.
5.3. METHODOLOGY

GENERAL
Three scenarios for visitation forecasts have been identified for the Great Ocean Road region as described below.

SCENARIO 1 – BASE FORECAST: PROJECTED GROWTH FOR AUSTRALIA WITH GOR MAINTAINING MARKET SHARE
Urban Enterprise has assumed that the Great Ocean Road will maintain 3% capture of international visitation to Australia and that the proportion of experience seeker visitors will remain the same.

INTERNATIONAL FORECAST METHOD AND ASSUMPTIONS
Forecasts for international markets are based on the model developed by Tourism Research Australia (TRA), which considers various factors such as price, aviation capacity, income, significant events, seasonality and qualitative research.

Urban Enterprise has utilised the annual growth rates identified by TRA for the key international markets to Australia between 2010 and 2020, and projected the number of experience seekers for the target markets to the Great Ocean Road region between 2010 and 2030.

DOMESTIC FORECAST METHOD AND ASSUMPTIONS
Forecasts for the key domestic experience seekers markets are based on resident population projections in Australia between 2010 and 2020. Urban Enterprise has categorised the key domestic experience seekers markets by age groups based on the analysis of market profile:
- Visible Achievement - mostly aged between 35 - 50 years;
- Traditional Family Life - mostly aged over 50 years;
- Young Optimism - likely aged between 18 and 28 years;
- Socially Aware - mostly aged between 28 and 40 years.

Based on the assumptions above, Urban Enterprise has projected key domestic markets by applying the annual population growth rate for each corresponding age group.

SCENARIO 2 – AUSTRALIAN MARKET SHARE OF INTERNATIONAL VISITATION INCREASED
Using a similar methodology as described above, method two also considers the potential of the share of international visitation to Australia to increase as a result of improved product and infrastructure and in particular the competitiveness of Australia in some of the growing markets such as China and India. Growth in international visitation is shown to increase at a rate of 4.5% after 2020.

SCENARIO 3 – AUSTRALIAN MARKET SHARE MAINTAINED WITH GOR INCREASING ITS MARKET SHARE
This scenario assumes that the Australian market share of international visitation will stay stagnant and that the domestic growth will also remain at 1.1% over 20 years. However
the market share of the Great Ocean Road region for international visitors will increase from 8.9% to 9.5% and domestic market share will increase from 3.1% to 3.5% over the 20 year period. The reasons why this increase in market share may occur include:

- Avalon Airport becoming an international airport;
- Domestic population growth in the North and West of Melbourne and in Geelong region;
- The Great Ocean Road becomes a more attractive location for key international markets through improvements to product and infrastructure.

5.4. FORECASTS SCENARIOS 2010–2030

The following provides forecast visitation growth scenarios for the Great Ocean Road Region.

Scenario 1, which provides the base growth rate and is based on projections from the Tourism Forecasting Committee, maintains the Great Ocean Road’s market share of total Australian visitation. This conservative scenario which is conservative suggests that visitation to the Great Ocean Road Region will grow from 7.2 million 2010 to 9.5 million by 2030.

Scenario 2 highlights a forecast increase in market share of International visitors to Australia, whilst the Great Ocean Road maintains its market share of these visitors. This forecast shows an increase in visitation from 7.2 million in 2010 to 9.6 million in 2030.

Scenario 3 provides a forecast which assumes that the Great Ocean Road will increase its market share of both international and domestic visitors. This scenario highlights that with a small variation in market share from 3.1% to 3.5% for domestic visitors and 8.9% to 9.5% for international visitors, visitation to the Great Ocean Road Region would grow significantly from 7.2 million to 10.5 million by 2030. Tourism product and infrastructure should consider the potential to cater for between 9.5 and 10.5 million visitors by 2030.

The market share identified above has been reached in previous years and is slightly higher than the historical 10 year average market share for the Great Ocean Road Region.

5.5. INTERNATIONAL EXPERIENCE SEEKERS PROJECTIONS 2010–2020

The figure below shows a 20-year forecast for the target international markets to Australia and Great Ocean Road. India and China are projected to experience the most significant growth (8.9% p.a. and 8.5% p.a. respectively) of all experience seekers target markets for the Great Ocean Road region over the next 20 years. Experience seekers from India and China are forecast to double in number by 2030.

Traditionally strong Great Ocean Road markets, such as the UK, Germany and New Zealand are expected to grow at rates significantly lower than expected national growth. The conclusion to be drawn from this is that to maintain or grow its International market
share the Great Ocean Road Region must make inroads into the high growth Indian and Chinese markets.

**TABLE 19  KEY INTERNATIONAL MARKETS FORECAST, GOR 2010 – 2020**

![Diagram showing forecasted visitor numbers to the Great Ocean Road region from 2010 to 2030 for various countries.](image)

Source: CD Mota; Tourism Forecasting Committee, Forecast 2010 Issue 2, Tourism Research Australia

5.6. DOMESTIC EXPERIENCE SEEKERS

The table and figure below shows the forecast for the domestic target markets between 2010 and 2030.

Traditional Family Life visitors to the Great Ocean Road region are projected to reach 1.7 million in 2030 based on an average growth rate of 2.3% per annum between 2010 and 2030. This is followed by Socially Aware, which is forecasted to reach 2.0 million visitors to the Great Ocean Road in 2030, based on a growth rate of 1.1% per annum.

**TABLE 20  KEY DOMESTIC MARKETS FORECAST, GOR 2010 – 2020**

![Diagram showing forecasted visitor numbers to the Great Ocean Road region from 2010 to 2030 for domestic segments.](image)

Source: Roy Morgan Value Segments 2008, CD Mota & 3222.0 Population Projections, Australia, ABS.
5.7. 2020 TOURISM INDUSTRY POTENTIAL

2020 Tourism Industry Potential, produced by the Department of Resources, Energy and Tourism, sets out targets for the generation of expenditure by overnight visitation in the sector. The Potential sets goals of increasing overseas visitation to 45%, from 38% in 2009, and expenditure from under $70 billion to between $115 and $140 billion by 2020.

If this potential is realised, and the Great Ocean Road maintains its current market shares of 4% of international and 3% of domestic, overnight tourism expenditure could increase between 2 and 2 ½ times by 2020, as shown in Table 21.

<table>
<thead>
<tr>
<th>TABLE 21</th>
<th>2020 TOURISM POTENTIAL – GOR PROJECTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>GOR</td>
</tr>
<tr>
<td>International</td>
<td>Domestic</td>
</tr>
<tr>
<td>2009</td>
<td>$17,145,557,000</td>
</tr>
<tr>
<td>2020 - Low Potential</td>
<td>$51,750,000,000</td>
</tr>
<tr>
<td>2020 - High Potential</td>
<td>$63,000,000,000</td>
</tr>
</tbody>
</table>

5.8. 5.9. FORECAST DEMAND FOR ACCOMMODATION

FORECAST DEMAND

Demand for accommodation has been estimated by projecting high and low scenarios for visitation to the Great Ocean Road region. A number of assumptions have been made regarding the proportion of overnight visitors, average length of stay and persons per room to estimate the number of guest rooms required to meet demand in 2030, these are highlighted below.

As the table below shows, if forecast visitation reached the high growth scenario of 10.5 million visitors by 2030, an additional 3,440 commercial guest rooms will be required across the Great Ocean Road region. If we consider the low base scenario of 9.6 million visitors by 2030, an additional 2,555 commercial guest rooms will be required by 2030 to meet forecast demand.

If there is loss of accommodation stock which has been anecdotally experienced in locations such as Queenscliff, supply in addition to that identified below will be required. The forecast also assumes that holiday homes and residential properties will continue to absorb 49% of overnight visitors. If increased residential supply is not provided to support this growth, additional commercial rooms above that identified will be required.

<table>
<thead>
<tr>
<th>TABLE 22</th>
<th>FORECAST DEMAND FOR GUEST ROOMS WITHIN THE GREAT OCEAN ROAD REGION BY 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>visitors</td>
<td>Commercial room nights</td>
</tr>
<tr>
<td>2010</td>
<td>7,200,000</td>
</tr>
<tr>
<td>2030 High*</td>
<td>10,500,000</td>
</tr>
<tr>
<td>2030 Low</td>
<td>9,600,000</td>
</tr>
</tbody>
</table>

* Based on an assumption of 32% of overnight visitors, average of 4 nights stay, 2.5 visitors per room and 51% of overnight stays is in commercial accommodation. NVS/IVS data has been used to support these estimates.

FORECAST DEMAND BY TYPE OF ACCOMMODATION

We cannot assume that the existing mix of accommodation will meet demand long term visitor demand preferences. Primary research undertaken in Corangamite Shire suggests that the existing mix of accommodation does not meet existing preferences in that Shire. See figure below:
In addition the target market segments have specific preferences which may not be met adequately in the region. The accommodation preferred by target markets includes:

- Budget hotels;
- 4/5 star hotels/resorts;
- Guest houses/B&Bs;
- Self-contained.

Based on the above the following table shows existing accommodation mix in the region and an estimate of the best mix for existing and future visitor markets (taking into account greater capture of key experience seeker segments). This provides a target for accommodation delivery over the next 20 years.

Projected accommodation required to meet future demand over the next 20-30 years includes:

- At least 1 signature accommodation establishment;
- Up to 4 large resorts of 4.5 star standard;
- 90 farm stay accommodation establishments;
- Up to 5 new large backpacker hostels;
- Up to 5 new caravan or tourist parks;
- Up to 12 new hotels of various sizes and star rating including budget and also 5 star with international branding;
- Up to 50 Guest houses and B&Bs;
- Self-contained apartments and houses across the region.
TABLE 24  PROJECTED ACCOMMODATION NEEDS WITHIN THE GREAT OCEAN ROAD REGION 2030

<table>
<thead>
<tr>
<th>Type of Accommodation</th>
<th>2030 Rms</th>
<th>2030 %</th>
<th>Additional rooms</th>
<th>Additional establishments</th>
<th>Qualitative notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort</td>
<td>1,445</td>
<td>14%</td>
<td>806</td>
<td>3-4</td>
<td>Most rooms should be of 4-4.5 star standard</td>
</tr>
<tr>
<td>Farm Stay</td>
<td>310</td>
<td>3%</td>
<td>271</td>
<td>90</td>
<td>Disbursed throughout the hinterland, linked to agriculture sector</td>
</tr>
<tr>
<td>Backpacker/Group</td>
<td>826</td>
<td>8%</td>
<td>258</td>
<td>4-6</td>
<td>Higher quality group accommodation required</td>
</tr>
<tr>
<td>Caravan Park</td>
<td>826</td>
<td>8%</td>
<td>196</td>
<td>3-5</td>
<td>Focus should be on improved ancillary facilities</td>
</tr>
<tr>
<td>Hotel/Motel</td>
<td>3,096</td>
<td>30%</td>
<td>649</td>
<td>10-12</td>
<td>Mix of 3.5 star and 4.5 star, One 5 star Wilderness Lodge</td>
</tr>
<tr>
<td>B&amp;B/Guest House</td>
<td>826</td>
<td>8%</td>
<td>430</td>
<td>40-50</td>
<td>Should aim to be above 5 rooms for business sustainability</td>
</tr>
<tr>
<td>Self-contained/holiday</td>
<td>2,993</td>
<td>29%</td>
<td>833</td>
<td>200-300</td>
<td>Should focus on larger developments which deliver more rooms for business sustainability</td>
</tr>
<tr>
<td>Total Establishments</td>
<td>10,319</td>
<td>100%</td>
<td>3,440</td>
<td>350-467</td>
<td></td>
</tr>
</tbody>
</table>

Source: Urban Enterprise

5.10. FORECAST DEMAND FOR TRANSPORT

ROADS

The visitation projections show in the high scenario indicate an additional 3.3 million people will visit the Great Ocean Road Region by 2031 and of these 91% will travel by car. Discussions with VicRoads shows that the Great Ocean Road is at capacity at around 4 times a year, coinciding with the peak summer and Easter holiday period. VicRoads has also highlighted that the road capacity issue only relates to the section of road between Torquay and Lorne.

Not all 3.3 million visitors will use the Great Ocean Road and many visitors will travel directly to their destination, so it is important that the network of roads across the region is considered when measuring the impact of forecasts on traffic.

Due to the additional visitors projected to visit the Great Ocean Road Region, the following strategies need to be considered to meet forecast needs:

- Princes Highway upgrade. Duplication of the Highway through to Colac has received commitment from the Federal and State Government and is due for completion within 8 years. This will significantly improve alternative road links;

- GOR Link Roads. Some work has commenced which relates to safety improvements of the Link Roads. Ongoing maintenance of these roads may need further support to meet the forecast demand;

- Great Ocean Road. The capacity issues for the Great Ocean Road at peak times are unlikely to be solved, the key is to ensure that the road quality, response times and dispersal of visitors is improved.

RAIL

National Visitor Survey Statistics shows that around 2.75% of visitors to the Great Ocean Road region travel by train. The table below shows the additional capacity required to cater for this using the high growth scenario.

If we assume that the proportion of visitors travelling by train remains constant and additional 100,000 visitors need to be accommodated by train transport by 2030.
### TABLE 25 VISITORS TRAVELLING BY TRAIN 2010 AND 2030 (PROJECTED)

<table>
<thead>
<tr>
<th></th>
<th>Visitors travelling by Train</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>189,000</td>
</tr>
<tr>
<td>2030 High growth Scenario</td>
<td>283,500</td>
</tr>
</tbody>
</table>

#### 5.11. FORECAST DEMAND FOR VISITOR ATTRACTIONS

It is difficult to estimate the existing capacity of attractions within the Great Ocean Road Region, as these are varied and dispersed. However we can be sure that an additional 3.3 million visitors based on the high forecast scenario will create additional demand for existing attractions and demand for new attractions also.

In response to forecast demand existing attractions need to be improved to cater for increased capacity (e.g.: Otway Fly, Flagstaff Hill and Surf World) and new attractions need to be developed which create new experiences for projected growth in visitation.

Port Campbell National Park is estimated to attract around 2 million visitors per annum. Being the hero product in the region it is most likely that this number will increase at a rate similar to growth projections, i.e.: by 2030, the Park may attract up to 2.9 million visitors. Infrastructure at Port Campbell National Park would need to be considered for additional capacity, this includes parking facilities, day visitor facilities, walking trails etc. Similar considerations need to be made for other National Parks and public land across the Great Ocean Road Region.
PART C
TOURISM AUDIT
6. EXPERIENCE AUDIT OF THE GREAT OCEAN ROAD REGION

6.1. INTRODUCTION
This section identifies the experiential strengths of the region, drawing on existing literature, marketing materials, consultation with Local Government and industry and the product and infrastructure audit. The consultation program is shown in Appendix B.

6.2. KEY FINDINGS
Visitor experiences in the Great Ocean Road Region have been identified through a review of existing literature and through consultation with GOR stakeholders. The iconic and unique visitor experiences in the Great Ocean Road Region include:

- Drive the Great Ocean Road;
- View the 12 Apostles;
- Follow the Great Ocean Walk;
- Visit Bells Beach and experience the surf culture at surf breaks, shops and coastal towns;
- Discover maritime history;
- View Australian wildlife.

The majority of the iconic experiences in the Great Ocean Road region are centred on nature based tourism. There are a range of other experiences across the region, which whilst not iconic, provide the visitor with a high quality experience. These include:

- Food and wine experience including dining at seaside villages and visiting wineries/cellar doors;
- Heritage and history experience including maritime history along the shipwreck coast such as Flagstaff Hill, surf history in Torquay and lighthouses/light stations;

Events and Festivals: various well branded and high quality recreation/ nature based events (e.g.: Great Ocean Road marathon, Melbourne to Warrnambool Classic cycling race, Fun4Kids Festival, Rip Curl Pro, Australian Rules football at Kardinia Park) and large music events (e.g.: Falls Festival, Port Fairy Folk Festival). In addition to music and nature based events, business events are also prominent in the region, particularly in Geelong and Surf Coast.

These experiences could be further developed through investment in infrastructure and product, leading to the development of new iconic experiences, for example:

- Cycle the Great Ocean Road Region;
- Experience the Wild South Ocean by Sea;
- Taste the Great South Ocean;
- Learn about Southern Australian Aboriginal Culture and Settlement;
- Attend a Great Australian Music Event;
- Attend a Great Australian Sporting Event.
The diagram below represents the availability of key preferred experiences in the Great Ocean Road Region. Nature based tourism experiences are the most numerous, whilst shopping experiences are lowest in supply.

SUPPLY OF GREAT OCEAN ROAD EXPERIENCES FOR KEY MARKET SEGMENT PREFERENCES
6.3. MARKETED ICONIC EXPERIENCES

There are a number of experiences which are marketed by Tourism Victoria and the Great Ocean Road Marketing above others in the region, with a focus on international and domestic experience seekers. These are taken from the recently developed Great Ocean Road ‘must have experiences’ website (http://www.greatoceanrd.org.au/MustHaveExperiences.aspx). Must have experiences identified include:

- **Great Ocean Road Drive.** One of the world’s most scenic coastal touring routes, the Great Ocean Road, spanning 243 kilometres along the stunning coastline of Victoria’s south-west;

- **The 12 Apostles.** Witness the rugged splendour of the famous 12 Apostles and Loch Ard Gorge, magnificent rock stacks that rise up majestically from the Southern Ocean on Victoria’s dramatic coastline;

- **Great Ocean Walk.** The Great Ocean Walk, on Victoria’s spectacular west coast, stretches 104 kms from the idyllic resort town of Apollo Bay, to within sight of the magnificent 12 Apostles;

- **Geelong Waterfront.** Geelong’s picturesque waterfront is the perfect place to take in the sea air, dine alfresco and enjoy a hive of waterfront activities;

- **Surfing.** Surf the west coast of Victoria at many beaches throughout the Great Ocean Road region from the famed breaks of Bells Beach, a much-loved icon of Australia’s surf scene where the Rip Curl Pro is held every Easter, to the big right-handers of Blacknose, famous in a big south westerly with a heavy sea, beyond Discovery Bay;

- **Outdoor adventure.** If you are heading outdoors in the Great Ocean Road, the beautiful beaches are bound to feature. The ocean offers great waves for swimmers and surfers, different vantage points and lucky catches for recreational anglers and is a beautiful backdrop, both in sight and sound, for cycling, horse riding, kayaking, golf and rambling coastal cliff top walks;

- **Wildlife viewing.** See amazing wildlife in the Great Ocean Road region from whale watching and swimming with dolphins to spotting koalas and the elusive platypus.

See kangaroos and koalas up close at the Tower Hill State Game Reserve or wander through Melba Gully to view a large colony of glow worms providing a spectacular light show;

- **Great South West Walk.** Explore the beautiful limestone galleries of the Princess Margaret Rose Cave in Lower Glenelg National Park. Admire the ocean views at Discovery Bay and see the stunning spring wildflowers blossoming along the magnificent Glenelg River;

- **Cape Bridgewater.** See some of the highest coastal cliffs in Victoria overlooking the deep-blue waters of Bridgewater Bay that stretches in a perfect crescent around the rim of a huge, ancient volcano crater;

- **Maritime History.** Discover the dramatic past of the Great Ocean Road region’s treacherous section of coast that has claimed more than 180 ships in its colourful maritime heritage. Take in spectacular views from historic lighthouses dotted along Victoria’s south west coastline. Flagstaff Hill Maritime Village, Warrnambool, provides a glimpse into the maritime lifestyles and trades of the 1870’s era, the peak of Australia’s maritime heritage;

- **Horse Riding.** Ride along pristine beaches and take in some of Australia’s most beautiful coastal scenery. Sunset rides are particularly special. Enjoy the exhilarating feeling of galloping along the sand with the wind in your hair or ride along coastal cliff tops in beautiful bushland settings.

6.4. INVENTORY OF GREAT OCEAN ROAD EXPERIENCES

Niche and unique experiences that are offered in the region are identified below. These have been drawn from consultation with industry and Local Government and a review of the previous experience audit undertaken in the region in 2008 by Fresh Projects.

**NATURE BASED/ADVENTURE**

- Follow the scenic Great Ocean Walk;

- Viewing the 12 Apostles by helicopter or plane;

- Surf renowned surf breaks along the coast, including surf lessons;
- Horse trail rides through the Otway Ranges, Bellarine Peninsula and along Aireys Inlet;
- Visit spectacular waterfalls and temperate rainforest at Great Otway National Park;
- Experience the magnificent Mountain Ash of the Otway Ranges at the Otway Fly;
- Dive shipwrecks at Port Campbell and Queenscliff;
- Experience the challenging single track Mountain biking at Forrest;
- Encounter the wilderness on the Great South West Walk;
- Wild Game fishing charters from Portland and Apollo Bay;
- Cycle the renowned Great Ocean Road and challenges of the various Otway Ranges climbs;
- Surf fishing from the various Ocean beaches;
- Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff;
- Skydive over the Great Ocean Road;
- Visit iconic Bells Beach;

FOOD AND WINE
- Dining at seaside villages of the Great Ocean Road - Port Fairy, Apollo Bay, Lorne;
- Visiting cellar doors in the Henty Wine Region;
- Wine tasting and dining at the cool climate wineries of Geelong/Bellarine;
- Dining at the Geelong waterfront;
- Warmambool foreshore, with ocean views;
- Food, Wine and Vistas Loop, Timboon;
- Local produce from various farmers markets;
- Unique high quality fresh seafood, including abalone from Portland, mussels from Portarlington, rock lobsters from Port Campbell, deep sea fish from the regions ports, and fishing Co-ops at Lorne and Apollo Bay;
- Tour the food and wine product along the Bellarine Taste Trail and Otway Harvest Trail.

WILDLIFE
- Koala viewing at Kennett River;
- Viewing Australian megafauna in their habitat (Kangaroos, Emus and Wallabies) at Tower Hill State Reserve;
- Whale watching at Portland and Warrnambool;
- Kayaking and boating through seal colony at Apollo Bay and Cape Bridgewater;
- See the rare Australian Platypus at Lake Elizabeth;

INDIGENOUS
- Learn about the Budj Bim National Heritage Landscape and the cool climate Indigenous culture, Lake Condah;
- Learn about the Worn Gundidj/Tower Hill Game Reserve;
- Learn about Indigenous heritage and contemporary culture at Narana Creations, Geelong;

GOLF
- Golf with the Kangaroos at Anglesea;
• Golf at Barwon Heads, Torquay, Lorne and Queenscliff;

• Play courses with spectacular ocean views and coastal scenery such as Warrnambool;

HISTORY AND HERITAGE

• Discover Great Ocean Lighthouses including Cape Otway Lighthouse and Aireys Inlet Lighthouse;

• Learn about Australia’s Maritime history and heritage at Flagstaff Hill Maritime Village, Warrnambool;

• Learn about Portland’s maritime history - Portland Maritime Discovery Centre;

• Tour through and experience the Shipwreck Coast and learn about failed voyages at sea;

• Discover the Dinosaur age through fossils at Dinosaur Cove, Cape Otway;

• Discover the volcanic forms of the Kanawinka Geopark including Mount Widderin Caves, Princess Margaret Caves, Tower Hill and Mount Elephant;

• Learn about the history of surfing and the role of Torquay as the birthplace of Rip Curl and Quicksilver;

• Discover the history of the Great Ocean Road via a series of interpretive plaques and commemorative statue at Eastern View;

FESTIVALS AND EVENTS

• Run in the Great Ocean Road International Marathon, Great Ocean Road;

• Swim the iconic Pier to Pub, Lorne;

• Watch elite cyclists take on the oldest road cycling classic in the world - Melbourne to Warrnambool;

• Experience the iconic Rip Curl Pro, Bells Beach;

• Attend Fun4Kids Festival, Warrnambool;

• Attend a number of folk, indie and alternative Music festivals;

• Experience the Australian Horse racing culture at Warrnambool racecourse;

• Experience the region through attending a business event;

• Experience Australian Rules Football at Kardinia Park (Skilled Stadium);

• Marvel at aircraft new and old at the Australian International Air show, Avalon;

• Challenge yourself in the mountain to surf run;

• Experience the regions wineries via the ‘Toast To The Coast’ event;

• Sail Port Phillip Bay at the ‘Festival of Sail’;

• Challenge yourself at the ‘Anaconda Adventure Race’ on Surf Coast;

TOURING

• Drive the iconic Great Ocean Road;

• Tour along Turton’s Track;

• Experience southern Australia along the Great Southern Touring Route.
6.6. EXPERIENCE SEEKER PREFERENCES MATCHED WITH REGIONAL EXPERIENTIAL STRENGTHS

The table following matches experience seeker preferences against the supply of experiences in the Great Ocean Road Region. The experiential preferences of key market segments includes: food and wine, nature based, shopping, festivals/events and wildlife.

When matched against the experience seeker preferences of the key target segments the following is found in terms of product development needs:

NATURE BASED/ADVENTURE TOURISM EXPERIENCES
- Product opportunities:
- Water based tours;
- Walking tours;
- Nature based accommodation;
- Dive tours.
- Infrastructure improvements:
- Day visitor facilities (toilets, picnic facilities);
- Interpretation;
- Piers, harbour and port improvements;
- Trail infrastructure improvements.

SHOPPING EXPERIENCES
- Product opportunities:
- Complementary retail experience to other product (merchandising).

FESTIVALS AND EVENTS
- Product opportunities:
- Food and wine events;
- Water based events;
- Cultural events;
- Exhibitions.
- Infrastructure improvements:
- Major indoor events/convention centre.

WILDLIFE
- Product Opportunities:
- Wildlife tours;
- Cycling tours.
- Infrastructure:
- Interpretive signage;
- Wildlife exploration trails;
- Day visitor infrastructure at wildlife locations (viewing points, toilets etc.)

FOOD AND WINE
- Product Opportunities:
- Gourmet produce;
- Local produce providers.
- Infrastructure:
- Winery and artisan produce signage;
- Branding.
## MATCH BETWEEN EXPERIENCE SEEKER PREFERENCES AND EXISTING EXPERIENCES IN GREAT OCEAN ROAD

<table>
<thead>
<tr>
<th>Experience Seeker Preferences</th>
<th>Key Experiences</th>
<th>Product Development Opportunities</th>
<th>Supporting Infrastructure Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and wine experience</td>
<td><strong>Dining at seaside villages of the Great Ocean Road - Port Fairy, Apollo Bay, Lorne, Queenscliff</strong>&lt;br&gt;Visiting cellar doors in the Henty Wine Region&lt;br&gt;Dining at the Geelong waterfront&lt;br&gt;Wine tasting and dining at the cool climate wineries of Geelong/Bellarine/Surf Coast&lt;br&gt;Food, wine and vistas loop, Timboon area.&lt;br&gt;Local produce from various farmers markets&lt;br&gt;Unique high quality fresh seafood, including abalone from Portland, Muscles from Portarlington, Rock Lobsters from Port Campbell and deep sea fish from the regions ports.&lt;br&gt;Tour the food and wine product along the Bellarine Taste Trail and Otway Harvest Trail</td>
<td>Destination dining&lt;br&gt;Complementary food offer&lt;br&gt;Destination dining, waterfront dining&lt;br&gt;Tours, charters, local dining&lt;br&gt;Local direct seafood sales&lt;br&gt;Cellar doors/ food offer at wineries</td>
<td>Harbour/marina developments</td>
</tr>
<tr>
<td>Nature based experience/adventure/walking</td>
<td><strong>Follow the scenic Great Ocean Walk</strong>&lt;br&gt;Viewing the 12 Apostles by helicopter or plane&lt;br&gt;Surf renowned surf breaks along the coast, including surf lessons&lt;br&gt;Horse trail rides through the Otway Ranges and Bellarine Peninsula&lt;br&gt;Visit spectacular waterfalls and temperate rainforest at Great Otway National Park&lt;br&gt;Experience the magnificent Mountain Ash of the Otway Ranges at the Otway Fly&lt;br&gt;Dive shipwrecks at Port Campbell and Queenscliff and Barwon Heads&lt;br&gt;Experience the challenging single track Mountain biking at Forrest&lt;br&gt;Encounter the wilderness on the Great South West Walk&lt;br&gt;Wild Game fishing charters from Portland and Apollo Bay&lt;br&gt;Cycle the renowned Great Ocean Road and challenges of the various Otway Ranges climbs.&lt;br&gt;Surf fishing from the various Ocean beaches&lt;br&gt;Sail Port Phillip Bay from Geelong, Portarlington and Queenscliff&lt;br&gt;Skydive over the Great Ocean Road&lt;br&gt;Visit iconic Bells Beach</td>
<td>Trail development in other locations&lt;br&gt;Tour and activities businesses&lt;br&gt;Nature based accommodation</td>
<td>New trails&lt;br&gt;Port improvements&lt;br&gt;Harbour/marina development&lt;br&gt;Day facilities improvements (toilets, change rooms, parking)&lt;br&gt;Trail improvements&lt;br&gt;Ocean access (boat ramps, harbour etc.)</td>
</tr>
</tbody>
</table>
| Shopping experience | Shop at the iconic local and international surf labels at Torquay Surf Precinct  
Meander through the Great Ocean Road village boutiques |   |   |
|---------------------|-------------------------------------------------------------------------------------------------|-------------------|-----------------|
| Festivals and events | Run in the Great Ocean Road International Marathon, Great Ocean Road  
Swim the iconic Pier to Pub, Lorne  
Watch elite cyclists take on the oldest road cycling classic in the world - Melbourne to Warnambool  
Experience the iconic Rip Curl Pro, Bells Beach  
Attend a number of folk, indie and alternative Music festivals  
Experience the Australian Horse racing culture at Warnambool racecourse  
Marvel at aircraft new and old at the Australian International Air show, Avalon  
Challenge yourself in the mountain to surf run  
Experience Australian Rule Football at Kardinia Park  
Experience the regions wineries via the ‘Toast To The Coast’ event  
Sail Port Phillip Bay at the ‘Festival of Sail’  
Challenge yourself at the ‘Anaconda Adventure Race’ on Surf Coast. | Food and wine events  
Water based events  
Cycling Gran Fondo | Event venues |
| Business event experience | Experience a corporate meeting/event, incentive or conference on the Great Ocean Road | Large international event venue  
Large dining venue | Convention and exhibition centre |
| Wildlife experience | Koala viewing at Kennett River  
Viewing Australian megafauna in their habitat (Kangaroos, Emus and Wallabies) at Tower Hill State Reserve  
Whale watching at Portland and Warnambool  
Kayaking and boating through seal colony at Apollo Bay and Cape Bridgewater  
See the rare Australian Platypus at Lake Elizabeth | Wildlife tours  
Wildlife trails | Wildlife interpretation signage  
Improved parking, toilets and information at wildlife sites |
7. **PRODUCT AND INFRASTRUCTURE**

**7.1. INTRODUCTION**

The product and infrastructure audit has been prepared drawing on existing databases provided by tourism organisations in the Great Ocean Road region, a review of marketing collateral and web based research. The product audit is focused on core tourism product including food and wine, nature based tourism, tours and activities and golf.

Infrastructure reviewed includes transport and roads, water based infrastructure including boat ramps, piers and harbours and parks related infrastructure.

Accommodation is reviewed independently in this section by location, type and quality (star rating).

Nature based tourism and food and wine have been mapped by product node, as these have been identified as the key preferences for key visitor segments.

**7.2. METHODOLOGY OF AUDIT**

**AUDIT OF PRODUCT AND INFRASTRUCTURE (QUANTITY)**

The methodology for the product and infrastructure audit has included the following steps:

1. Acquire membership databases for tourism businesses from each of the Regional Tourism Associations (Shipwreck Coast and Geelong Otway Tourism);

2. Supplement gaps in the databases with localised tourism databases from each of the Local Tourism Associations (e.g.: Port Fairy Tourism Association);

3. Scan tourism websites for additional product to supplement the audit (Great Ocean Road, Shipwreck Coast, Parks Victoria, Local Tourism Association websites and Tourism Victoria website);

4. Review existing regional maps online to identify supply of infrastructure.

**ASSESSMENT OF PRODUCT AND INFRASTRUCTURE (QUALITY)**

1. Undertake workshops in the region to identify the strengths and gaps in product (quality);

2. Due to the subjective nature of quality assessment for restaurants and cafes, an assessment has been based on the Good Food Guide.
7.3. FINDINGS

TOURISM PRODUCT

STRENGTHS

The Great Ocean Road Region has its primary strength in nature based tourism. Nature based tourism is available at a number of nodes in the region, including the Great Otway National Park and Otway Forest, Port Campbell National Park and Cape Bridgewater/Lower Glenelg National Park. Water based tourism is a consistent theme throughout the Great Ocean Road region.

Secondary strengths include food and wine, wildlife, history and heritage and events. Emerging product includes indigenous and wellness tourism.

WEAKNESSES

Weaknesses in the region relate to the lack of complementary product and infrastructure building on the key product themes of the region such as nature based tourism, food and wine and history and heritage. This includes day visitor facilities, interpretation and accommodation linked to nature based attractions. Food and wine product can be strengthened through leveraging off the seafood strengths and local produce in the region.

The food and wine and nature based tourism experiences in the hinterland are hampered by the lack of connections to the Great Ocean Road.

A key gap for the region is the low supply of high quality internationally branded accommodation, particularly along the Great Ocean Road. Internationally branded accommodation is located in Warrnambool, Torquay, Lorne and Geelong.

INFRASTRUCTURE

EXISTING CRITICAL TOURISM INFRASTRUCTURE

Critical infrastructure items for tourism in the Great Ocean Road Region include:

- The Great Ocean Road. Most major icons of the region including the 12 Apostles, coastal villages, walks and beaches are accessible via the Great Ocean Road.
- Princes Highway. Whilst not the key tourist route, it is essential for returning visitors to Melbourne and beyond to their next destination;
- Harbours, marinas, piers and jetties. Access to the water is critical for the Great Ocean Road region, and whilst there is great potential to improve this, water based infrastructure adds significantly to the visitor experience;
- Parks infrastructure. There are a number of National Parks, coastal reserves and gardens throughout the region that provide both passive and recreation experiences. Infrastructure at these public reserves is critical to support these activities;

AREAS OF INFRASTRUCTURE REQUIRED FOR IMPROVEMENT

The following infrastructure items are identified for improvement in the Great Ocean Road region; these will assist to support the growth of tourism.

- Improvements and capacity of the Great Ocean Road. The Great Ocean Road is at capacity during peak times. Improvement to parking bays, rest areas and passing bays needs to be explored. The general road quality also needs to be improved;
- Princes Highway. The Princes Highway is in poor condition from Winchelsea to Warrnambool, there is a need to improve the road into a dual carriageway to support growth in population and visitors;
- Harbours, marinas, piers and jetties. There are numerous development plans in places for harbours and marinas along the coast. These will improve water access significantly in the region;
- Park infrastructure. There is a need to improve facilities and infrastructure at various parks locations across the region to meet visitor expectations;
• Airport upgrades. Airport upgrades are required at Warrnambool and Avalon. This will improve access into the region significantly;

• Public transport. Improved regularity of train services along the Princes Highway Corridor and significantly improved public bus transport along the Great Ocean Road is necessary to meet existing and future demand for independent travellers. There is also a need to upgrade the rolling stock servicing this corridor.

• Accommodation. There are areas within the Great Ocean Road region that lack tourist accommodation, particularly internationally branded accommodation at the higher end of the market.
# Overview of Product Strengths and Weaknesses/Gaps

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Key Strengths</th>
<th>Weaknesses/Gaps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Product</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Nature Based Tourism | Port Campbell National Park, including the 12 Apostles  
Great Otway National Park  
Cape Bridgewater/Lower Glenelg NP  
Marine National Parks  
Great Ocean Walk, Great South Coast Walk, Surf Coast Walk  
Tower Hill  
Surfing and Cycling | Lack of interpretation of natural attractions  
Poor access to marine National Parks  
Day visitor facilities at National Parks  
Accommodation linking to natural attractions  
Trail infrastructure | |

| **Secondary Product** | | |
| Wildlife | Koalas at Kennett River  
Kangaroos, emus and Wallabies at Tower Hill  
Whale and seal watching at Apollo Bay, Warrnambool and Portland | Formal infrastructure and facilities at wildlife viewing points  
Access to whale watching/tours | |
| Food and Wine | Geelong and Henty wine regions  
Villages dining  
Local produce | Fresh seafood sales  
Fresh seafood restaurants  
Waterside dining | |
| History and Heritage | Surfing history  
Shipwreck history | Limitations of surf museum | |
| Art and culture | Village boutiques  
Surf culture | No large regional gallery expect in Geelong | |
| Golf | Coastal courses | Complimentary product - Accommodation, food, retail | |
| Accommodation | Holiday homes  
Motels  
3 star quality accommodation  
B&Bs | Internationally branded hotels, particularly on the Great Ocean Road  
Farm stay |
<table>
<thead>
<tr>
<th>Festivals and events</th>
<th>Music festivals</th>
<th>Nature based</th>
<th>Sports/ recreation events</th>
<th>Event venues</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Events = Meetings, Incentives, Conventions and Exhibitions</td>
<td>Business events</td>
<td></td>
<td></td>
<td>No large international event venue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>No large dining facility outside of hotels</td>
</tr>
<tr>
<td>Indigenous</td>
<td>Lake Condah/Mt Eccles</td>
<td></td>
<td>Tower Hill</td>
<td>Facilities at Tower Hill and Mt Eccles</td>
</tr>
<tr>
<td>Spa and well-being</td>
<td>Port Fairy, Warrnambool, Lorne and Torquay</td>
<td></td>
<td></td>
<td>No large spa or wellness facility at Lorne or Torquay. Geothermal spa at Warrnambool only.</td>
</tr>
</tbody>
</table>
7.4. PRODUCT AUDIT

7.4.1. NATURE BASED TOURISM

There is a total of 50 nature based tourism products in Geelong Otway compared to 40 in Shipwreck Coast. Shipwreck Coast has the greatest number of natural attractions (23 compared to 17) which are generally centred on the western part of the region. However, Shipwreck Coast does not have as many trails, tours or adventure activities as Geelong Otway. There is considerable potential to improve the offer at these attractions and capitalise on their natural beauty through improved interpretation and other visitor facilities.

The majority of adventure activities in the Geelong Otway Region were identified in the Bellarine/ Surf Coast area. There is potential to increase the dispersal of adventure activities in other areas of the Great Ocean Road region.

TABLE 26 OVERVIEW OF NATURE BASED PRODUCT IN THE GOR REGION

<table>
<thead>
<tr>
<th></th>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>GOR region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adventure</td>
<td>2</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Attractions</td>
<td>23</td>
<td>17</td>
<td>40</td>
</tr>
<tr>
<td>Trails</td>
<td>3</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Tours</td>
<td>15</td>
<td>22</td>
<td>37</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>40</strong></td>
<td><strong>50</strong></td>
<td><strong>90</strong></td>
</tr>
</tbody>
</table>

There are two wine regions in the Great Ocean Road Tourism Region: Henty Wine Region, which located across Glenelg, Moyne and Warrnambool LGA's and the Geelong Wine Region which includes wineries around Geelong, the Bellarine, Otway and Surf Coast Hinterland.

Both the Henty Wine Region and Geelong Wine Region are renowned for cool climate high quality wines. The Henty wine region has only 11 wineries identified, which are dispersed through the region, while Geelong wine region has 47 wineries identified.

Whilst some wineries already offer wine tasting and food experience in conjunction with wine production, there is an opportunity to increase this offer in both wine regions.

Destination dining is generally under-represented across the Region when compared to other places in Regional Victoria. Five restaurants are rated with The Age Good Food Guide ‘Chef’ hats: Merrijig Inn, Port Fairy (two hats) and Sunnybrae (one hat), Loam (two hats), Chris’s (one hat), Scorched (one hat).

TABLE 27 OVERVIEW OF FOOD AND WINE PRODUCT IN THE GOR REGION

<table>
<thead>
<tr>
<th></th>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>GOR region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farm Gate / Produce</td>
<td>8</td>
<td>33</td>
<td>41</td>
</tr>
<tr>
<td>Wineries</td>
<td>11</td>
<td>47</td>
<td>58</td>
</tr>
<tr>
<td>Destination Dining</td>
<td>8</td>
<td>11</td>
<td>19</td>
</tr>
</tbody>
</table>

7.4.2. FOOD AND WINE PRODUCT

Throughout the Great Ocean Road Region, 41 Farm Gate and produce stores have been identified. Of this supply the vast majority are located in the Geelong Otway Sub-Region, with key nodes around the Bellarine and the hinterland north of Torquay including Pennyroyal and Deans Marsh. In the Shipwreck Coast, there is a growing artisan local produce node around Timboon.

7.4.3. HISTORY AND HERITAGE

There are 25 history and heritage attractions in the Great Ocean Road Region. Standout history and heritage product includes the Maritime Village in Warrnambool and the Surf World Museum, Torquay. Both key heritage attractions could be improved in terms of their capacity and offer. Plans have been prepared for the development of both facilities.

The shipwreck heritage theme is present throughout the entire GOR region with dive tours and other heritage tours exploring this. The level of interpretation around the shipwreck
theme, however could be improved, particularly around key nodes such as Loch Ard Gorge.

Indigenous product, whilst not extensive across the region, has some core product nodes. Of note is the Lake Condah and Mount Eccles area, which provides stories of the Indigenous settlement in the area, including organised agricultural activities such as eel farming. This site presents a new theme for the understanding of the indigenous culture and provides an experience of indigenous culture which is different from the iconic themes of the nomadic Indigenous tribes in the north of Australia.

**Table 28** Overview of Heritage Product in the GOR Region

<table>
<thead>
<tr>
<th>Attractions*</th>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>GOR Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tours</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Indigenous Tourism</td>
<td>3</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>

*Excludes Shipwrecks

### 7.4.4. Destination Wellness

Destination wellness refers to tourism related wellness product as opposed to general wellness and spa product focused towards the residential sectors.

There is limited destination wellness product identified in the Region (10). Within the Shipwreck Coast region there are day spas at Port Fairy and Warrnambool. Warrnambool also has a geothermal spa. There is a node of destination and wellness product around the coastal part of the Surf Coast Shire (Torquay, Lorne). These venues are generally small and have potential to increase their quality and subsequently their market share. Further investment is required, as combining destination wellness products with accommodation can improve the visitor experience resulting in longer stays.

The notable gap in the provision of destination wellness product is the lack of geothermal facilities outside Warrnambool, which is a key destination product that would have the potential to attract a number of visitors and provide opportunities for complementary products to establish themselves.

**Table 29** Overview Supply of Destination and Wellness Product in the GOR Region

<table>
<thead>
<tr>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>Total GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>8</td>
<td>10</td>
</tr>
</tbody>
</table>

### 7.4.5. Art and Craft

Arts and craft product is dispersed throughout the Great Ocean Road Region. Concentrations of Art and Craft product can be found in and around Warrnambool, Port Fairy, Geelong, Torquay, Lorne and Anglesea. These products consist predominantly of small galleries and artist’s studios.

Following the success of regional galleries in Victoria such as Bendigo Art Gallery, there is potential for a larger gallery in the Great Ocean Road Region that can hold larger and notable exhibitions. Aside from the Geelong Gallery, no gallery in the region is of a high enough standard and great enough capacity size to host large exhibitions of this nature.
Table 30: Overview Supply of Art Galleries / Craft Markets Product in the GOR Region

<table>
<thead>
<tr>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>Total GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>17</td>
<td>46</td>
</tr>
</tbody>
</table>

7.4.6. Golf

Golf product is evenly distributed across the Great Ocean Road Region however the courses vary in quality. There are a number of Golf courses which are highly rated and can be found in Queenscliff, Curlewis, Lorne, Anglesea, Torquay, Port Fairy, Barwon Heads and Warrnambool. A number of golf courses in the region have coastal views and these courses act as key product for the Region as their location differentiates them from other courses in Regional Victoria. There is an opportunity to upgrade some golf courses further to make them more of a destination and to take advantage of their scenic outlook. This includes food offer and accommodation.

Table 31: Overview Supply of Golf Product in the GOR Region

<table>
<thead>
<tr>
<th>Shipwreck Coast</th>
<th>Geelong Otway</th>
<th>Total GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>17</td>
<td>35</td>
</tr>
</tbody>
</table>

7.4.7. Business Events and Conferencing

Business events and conferencing are predominantly being provided by the large accommodation sector. Most of the large accommodation establishments provide conference facilities to support 100-350 delegates. This includes the following major facilities:

- Mercure Geelong;
- Four Points by Sheraton Geelong;
- Peppers The Sands Resort, Torquay;
- Crowne Plaza Resort Torquay;
- Mantra Erskine Beach Resort, Lorne;
- Cumberland, Lorne;
- Sebel Deep Blue, Warrnambool;
- Lady Bay Resort, Warrnambool;
- Barwon Heads Resort;
- Geelong Conference Centre.

However there is critical lack of a conference centre focused on business events in the region with capacity for 350-1000 delegates. A centre of this scale would be suited to Geelong, given its proximity to Avalon Airport and existing accommodation stock to support overnight events. Large business events within the Great Ocean Road Region will provide flow on benefits for other destinations in the Great Ocean Road Region.

7.5. Infrastructure

Commercial Airports

Key commercial airports in the Great Ocean Road Region include Avalon, Warrnambool and Portland. Portland and Warrnambool airports have limited capacity while Avalon Airport will potentially expand to accept International visitors.

Warrnambool airport has potential to be developed further to allow for commercial jets to land, although currently the runway is not long enough to accommodate this.
Currently only low cost carriers fly to Avalon Airport, which presents a barrier to the business events market.

**RECREATIONAL AIRSTRIPS**

Recreational airstrips are located throughout the region. These allow visitors to explore the coast through aeroplane charters and joy flights. Key nodes include Apollo Bay, Port Campbell, Torquay and Lethbridge. There are tours from these destinations which link to King Island.

**ROADS**

A key attribute of the Great Ocean Road Region is the number of entry and exit points into the Region. The three key roads running East West are the Hamilton Hwy, the Princes Hwy and the Great Ocean Road. These roads provide access to different locations and have varying uses and levels of quality. Conversely, connections North South, particularly from the Goldfields, are of a lower quality and are not as well signed as East West connections due to the Great Otway National Park.

Both the Great Ocean Road and the Princes Highway are regarded as of low quality in sections. The Princes Highway in particular requires duplication from Winchelsea to Warrnambool to accommodate the increasing traffic in the region from growing residential populations and visitors alike.

**WATER TRANSPORT**

The Queenscliff-Sorrento Ferry provides a key link between the Great Ocean Road and the Mornington Peninsula. The Ferry is an excellent craft and popular mode of transport. There is opportunity to further promote touring between these iconic destinations.

There are a number of ports, harbours and marinas of varying quality. Major ports include Portland, Warrnambool and Geelong. There is significant opportunity to attract cruise shipping, however some upgrades to port infrastructure will be required for this to occur.

The region boasts a number of harbours suited to recreational boating, fishing charters and other water based activities such as dive tours. Most harbours have basic infrastructure levels, and development plans are in place for improvement. For the region to meet its water based activities potential, improvement to harbour infrastructure is essential.

There is an opportunity to introduce water based viewing of the 12 Apostles, departing from Port Campbell.

**PUBLIC TRANSPORT**

Public transport through the region includes train services along the Princes Highway corridor and some services along the Great Ocean Road. Services that support tourists are limited, by the infrequency of travel and inflexibility of coach routes along the Great Ocean Road. The key gap here is the lack of a public coach service which links Great Ocean Road towns and product. This service would be important for backpacker and independent travellers.

**TABLE 32 OVERVIEW OF INFRASTRUCTURE FOR TOURISM IN THE GOR REGION**

<table>
<thead>
<tr>
<th></th>
<th>Geelong Otway</th>
<th>Shipwreck Coast</th>
<th>GOR Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airports / airlines etc</td>
<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Road transport</td>
<td>10</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>Car hire operators</td>
<td>6</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Water transport</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>7</td>
<td>12</td>
</tr>
</tbody>
</table>
7.6. ACCOMMODATION

ACCOMMODATION CAPACITY BY TOWN

The table below and the accommodation nodes map following provide an overview of accommodation capacity and dispersal throughout the Great Ocean Road Region. There are five major accommodation nodes in the Great Ocean Road Region: these include Geelong, Torquay, Ocean Grove, Lorne and Warrnambool. These nodes were all recorded with over 500 guest rooms on offer. Warrnambool is the only node which falls outside of Geelong and Surf Coast Shire.

**TABLE 33 COMMERCIAL GUEST ROOMS BY GREAT OCEAN ROAD TOWN**

<table>
<thead>
<tr>
<th>Room Category</th>
<th>Towns</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-99 ROOMS</td>
<td>Skenes Creek, Portarlington, Cape Otway, Peterborough, Kennett River/Wye River</td>
</tr>
<tr>
<td>100-199 ROOMS</td>
<td>Barwon Heads, Princetown, Aireys Inlet, Colac, Belmont, Port Fairy, Camperdown</td>
</tr>
<tr>
<td>200-499 ROOMS</td>
<td>Point Lonsdale, Portland, Anglesea, Queenscliff, Port Campbell, Apollo Bay, Torquay</td>
</tr>
<tr>
<td>500+ ROOMS</td>
<td>Torquay, Geelong, Ocean Grove, Lorne, Warrnambool</td>
</tr>
</tbody>
</table>

LARGE ACCOMMODATION NODES

There are only 10 establishments identified in the Great Ocean Road Region that have more than 50 guest rooms. Of these only Lorne has an establishment with more than 200 rooms.

This highlights that the majority of accommodation in the Great Ocean Road Region is small in nature with the median size for accommodation being only 3 rooms and the mean of 8 rooms.

**TABLE 34 TOURISM NODES WITH LARGE ACCOMMODATION ESTABLISHMENT (MORE THAN 50 COMMERCIAL GUEST ROOMS)**

<table>
<thead>
<tr>
<th>Tourism Node</th>
<th>Number of Establishments with more than 50 rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland</td>
<td>1</td>
</tr>
<tr>
<td>Warrnambool</td>
<td>3</td>
</tr>
<tr>
<td>Lorne</td>
<td>2</td>
</tr>
<tr>
<td>Geelong</td>
<td>2</td>
</tr>
<tr>
<td>Torquay</td>
<td>2</td>
</tr>
</tbody>
</table>

ACCOMMODATION BY TYPE

Self-contained (predominantly holiday homes) establishments contribute the majority of establishments across the Great Ocean Road Region (58%). This is followed by B&B’s/Guest Houses (15%) and Hotels/Motels (14%).

In terms of rooms in the Great Ocean Road Hotels/Motels provide the majority of these (36%), followed by Self-contained (31%).
### TABLE 35  ACCOMMODATION BY TYPE – GREAT OCEAN ROAD REGION

<table>
<thead>
<tr>
<th>Type of Accommodation</th>
<th>Number of Establishments</th>
<th>% of Total</th>
<th>Rooms</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort</td>
<td>9</td>
<td>1%</td>
<td>639</td>
<td>9%</td>
</tr>
<tr>
<td>Farm Stay</td>
<td>13</td>
<td>1%</td>
<td>39</td>
<td>1%</td>
</tr>
<tr>
<td>Backpacker/Group Accommodation</td>
<td>22</td>
<td>3%</td>
<td>568</td>
<td>8%</td>
</tr>
<tr>
<td>Caravan Park</td>
<td>63</td>
<td>7%</td>
<td>630</td>
<td>9%</td>
</tr>
<tr>
<td>Hotel/Motel</td>
<td>124</td>
<td>14%</td>
<td>2447</td>
<td>36%</td>
</tr>
<tr>
<td>B&amp;B/Guest House</td>
<td>132</td>
<td>15%</td>
<td>396</td>
<td>6%</td>
</tr>
<tr>
<td>Self-contained/holiday homes**</td>
<td>505</td>
<td>58%</td>
<td>2160</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Total Establishments</strong></td>
<td>868</td>
<td>100%</td>
<td>6879</td>
<td>100%</td>
</tr>
</tbody>
</table>

** This includes holiday homes that are members of regional and local tourism organisations. There are a vast number of additional holiday homes that are rented out through real estate agents and other private organisations that are not included in this data.

### QUALITY OF TOURIST ACCOMMODATION

There are very few large high quality ‘internationally branded’ tourist accommodation establishments in the Great Ocean Road region. The only identifiable large high quality internationally branded accommodation (4.5 star or higher) are:

- Mercure Geelong;
- Four Points by Sheraton Geelong;
- Peppers The Sands Resort, Torquay;
- Crowne Plaza Resort Torquay;
- Mantra Erskine Beach Resort, Lorne;
- RACV Torquay;
- Sebel Deep Blue, Warrnambool.

There are other 4.5 star hotels/resorts, however these are not ‘internationally’ branded. The key issue here is that there are limited hotels available in the Great Ocean Road region that are available to international wholesale markets. This is a key barrier to the promotion of the Great Ocean Road from an international perspective.
GREAT OCEAN ROAD REGION
ACCOMMODATION NODES

- 500+ rooms
- 200-499 rooms
- 100-199 rooms
- 50-99 rooms
- Internationally branded accom.
8. **Barriers to Investments**

8.1. **Introduction**
Consultation with industry representatives has identified several issues that are impacting on further investment in tourism product and infrastructure in the Great Ocean Road region. These obstacles include labour supply, access to finance, land use zones, public land leases, tour operating licenses, and fisheries legislation.

8.2. **Labour**
The available labour force in the Great Ocean Road region presents an issue for investors. As the price of housing has increased the number of workers has diminished, particularly in places like Lorne where there is limited opportunity to increase housing supply.

Exacerbating this is the lower than average levels of education and declining numbers of young, employment age people in the Great Ocean Road region. There is also forecast to be a decline in workers in the region over the next few years, as the baby boomers leave the workforce, creating further labour shortages2.

8.3. **Access to Finance**
There has been some evidence that it is becoming increasingly difficult for developers in Regional Victoria to access finance to undertake tourism projects. In particular developers consulted have identified that the ‘big four’ banks have been very conservative in their lending to commercial projects. Most large tourism projects which have been developed in Regional Victoria over the past 5 years have either secured funding from external (international) sources or have been funded privately.

8.4. **Rural Zones**
Changes to rural zoning have impacted on land use in rural areas considerably. The zones respond to the need to prevent rural land use conflict between farming and non-farming neighbours and the need to provide opportunities in rural areas.

The Farming Zone and Rural Conservation Zones in the rural areas of the region place significant limitations on tourism use and new investment in the region. Limitations on tourism uses in the Farming Zone include:

- Prohibition on accommodation, other than a Bed and Breakfast and Host Farm unless used in conjunction with agriculture, outdoor recreation, rural industry or winery;
- Prohibition on retail sales, other than primary produce sales (which only allows sale of unprocessed produce grown on the property or adjoining property);
- Helicopters are unable to land in a Farming Zone, unless it is for a farming use, which limits the possibility for tourist uses.

In Rural Zones where the increasing demand for residential and tourism uses necessitates increased flexibility, implementation of Rural Activity Zones or Special Use Zones should be considered. The Golden Plains Shire provides an example, where recently the Moorabool Valley was rezoned to facilitate tourism in the area. Corangamite Shire has also undertaken an extensive study which recommends rezoning in some rural areas to accommodate tourism development.

A detailed study in other Shires in the Great Ocean Road Region which identifies suitable sites for tourism development is required. This will allow opportunities for nature based tourism and other tourism activities to occur which are unrelated to agriculture.

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2 Great South Coast Regional Strategic Plan, p.8
8.5. PUBLIC LAND REGULATION

There are a number of issues around public land regulation for tourism purposes that pose a barrier and threat to private sector investment. The Victorian Tourism Industry Council has acknowledged and provided a number of recommendations in relation to the issues identified below:

Some operators believe that the leasehold length for public land is too short, making it difficult to obtain investment funding and make substantial capital investments. In 2009 amendments to the Crown Land Act extended the normal lease period to 21 years, with provision for the Minister to offer 50 to 99 years if there is to be a new building erected or improvements to be made. In comparison, Queensland and Tasmania offer 99 year leases.

Extending the length of the leasehold and assessing each lease on its individual merits will help facilitate investment in public land through providing certainty of tenure.

Victoria’s Competitive Neutrality Policy’s objective is to ensure that those benefitting from public resources do not distort the market when competing with private enterprise. This is also an issue with the leasing of public land. To ensure that operators on private land remain competitive with operators leasing Crown Land, rents must be set at a rate equivalent to the broader market.

Further to this, there is some concern in the tourism community regarding government agencies such as Parks Victoria facilitating development on Crown Land. It is important for considerable analysis to be undertaken by Government to justify each development that they undertake, to provide assurances to the local community that the development will be beneficial to the region’s economy, and not impact on existing tourism operators.

8.6. LICENSING OF TOUR OPERATORS

The Victorian Crown Land Act requires for tour operators on Crown land to pay a use fee. The fees for 2010/2011 are:

- $55 per year for a licence
- $1.10 per person per day for all tours except school groups, where it is 75c per person per day;

The maximum payable for the financial year is $5,500.

A Regulatory Impact Statement prepared by the Department of Sustainability and Environment has investigated the Tour Operator Fees, which currently recover 32% of the costs of operating the licensing system. The review of fees has proposed a significant increase to tour operator fees to address the operating cost shortfall, namely:

- A minimum of $255 per year licence fee, competitively allocated if appropriate.
- $2.40 per general visitor per day, and $1.60 per student
- A fee cap of $12,500.

There are concerns within the Great Ocean Road tour operator community that such a large increase in fees will make their businesses unviable.

The Regulatory Impact Statement also includes a proposal to competitively tender licences where there should be restrictions on the number of tours due to environmental, cultural or public safety considerations.

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3 CROWN LAND ACTS AMENDMENT (LEASE AND LICENCE TERMS) ACT 2009 (NO. 40 OF 2009) – SECT’s 12 and 28


5 Department of Treasury and Finance, Victoria: Competitive Neutrality Policy


8 DSE: Tour Operator Licence Fees Regulations 2011.
Consultation with tourism operators also provided a recommendation to increase the stringency of testing required to obtain a tour operators licence: currently all that is required is the payment of fees and submitting a form9.

8.7. **SEAFOOD DISTRIBUTION**

It is illegal for commercial fishers to directly sell their catch to either the public or commercial entities10. In places with a commercial fishing industry visitors wait for the fishing boats to come in before offering to buy their catch, showing that there is a potential market for this kind of product. As this regulation is related to the Australian Fisheries Management Authority’s monitoring of catches, it is unlikely to be repealed.

Setting up a fish cooperative, such as in Apollo Bay, or a wholesale fish market will enable commercial fishing operators to service this market, provide another stream of revenue and will strengthen the food and wine component of the Great Ocean Road Tourism.

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PART D
TOURISM PROJECTS
9. **POTENTIAL PROJECTS**

9.1. **INTRODUCTION**

This section of the report provides an overview of potential tourism product development and infrastructure projects to be considered for prioritisation.

Potential projects for consideration have been identified through:

- Review of regional and state strategic plans;
- An assessment of demand from experience seeker segments and visitor growth projections;
- Product and infrastructure gap analysis;
- An audit of visitor experiences in the region;
- Consultation with Local Government, the tourism industry and State Government stakeholders.

The following table highlights a brief project description of tourism product development projects and tourism infrastructure projects for consideration.
## 9.2. PRODUCT DEVELOPMENT PROJECTS

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Ocean Road Signature Accommodation, Moonlight Head</td>
<td>A 5 star internationally branded wilderness lodge in the Moonlight Head area with outstanding coastal views.</td>
</tr>
<tr>
<td>Great Ocean Road Integrated Resort, Port Campbell Area</td>
<td>A 4 star internationally branded resort in the Port Campbell area with outstanding coastal views. This would cater for large coach groups and independent touring visitors.</td>
</tr>
<tr>
<td>Apollo Bay Internationally Branded Hotel</td>
<td>A 4.5 star 60+ room hotel in Apollo Bay focused towards both international and domestic markets.</td>
</tr>
<tr>
<td>Nature Based Eco Accommodation</td>
<td>Self-contained nature based accommodation in various locations linking to the region’s natural assets.</td>
</tr>
<tr>
<td>Seafood Experience and Dining</td>
<td>A seafood experience strategy across the region which promotes access to local quality seafood through improved infrastructure to support seafood related business opportunities. Seafood experiences in the region will include:</td>
</tr>
<tr>
<td></td>
<td>• Mussels at Portarlington;</td>
</tr>
<tr>
<td></td>
<td>• Deep sea fishing co-op at Apollo Bay;</td>
</tr>
<tr>
<td></td>
<td>• Deep sea fishing co-op at Lorne;</td>
</tr>
<tr>
<td></td>
<td>• Rock Lobster at Port Campbell;</td>
</tr>
<tr>
<td></td>
<td>• Tuna and other deep-sea fishing at Portland;</td>
</tr>
<tr>
<td></td>
<td>• Abalone off Portland.</td>
</tr>
<tr>
<td>Water-Based Tours and Activities</td>
<td>There are a number of opportunities for water based activities, these include:</td>
</tr>
<tr>
<td></td>
<td>• Adventure boat cruises from Port Campbell;</td>
</tr>
<tr>
<td></td>
<td>• Game fishing tours (Apollo Bay, Portland, Queenscliff, Lorne);</td>
</tr>
<tr>
<td></td>
<td>• Whale watching tours (Portland);</td>
</tr>
<tr>
<td></td>
<td>• Sea kayak tours (Port Campbell, Princetown, Portland).</td>
</tr>
</tbody>
</table>
### Improving the Bells Beach Experience and Redevelopment of Surf City

This large multi-faceted project includes a number of tourism elements, namely:

- Upgrade the car park and visitor facilities and also to enhance the visitor experience by greatly improving the interpretation and education opportunities within the Bells Beach Surfing Reserve
- A completely new Surf City Precinct - new shops, more office space, a large community plaza (similar to Fed Square not in size but the way in which it is used)
  - A new Surf World Museum which is also the new home for Surfing Victoria
- Major conference facilities with a multi purpose space that can be used for smaller meetings or opened up to support a major conference/event/exhibition. This facility will support surf industry as well as providing a unique themed venue for our major conference centres in Torquay (RACV, the Sands, Crown Plaza) and in future a break out space for the Geelong Conference Centre.
- A new Torquay Visitor Centre acting as a major regional gateway centre to the Great Ocean Road (acknowledging that Little River is only a satellite VIC)

### Geothermal Bathhouse Development at Port Fairy

A geothermal bathhouse in Port Fairy will take advantage of the geothermal ground water. The centre will provide a range of private and public baths.

### Flagstaff Hill Continuous Improvement

The continuous improvement of Flagstaff Hill includes:

- Accommodation - Group Style;
- Temporary Exhibition Space;
- Night Show Enhancements;
- Flagstaff Hill Wooden Boat Slipway Redevelopment;
- Function Centre - Catering Area Expansion.

### Great Ocean Road Events

An events strategy which provides a detailed assessment of existing events, seasonality and opportunities for event development. Events should build on the experience strengths of the region.

### Development of Warrnambool Golf Course

Accommodation development at the Warrnambool Golf Course.
### 9.3. Tourism Infrastructure Projects

#### Tourism Infrastructure Projects for Consideration

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Campbell Precinct and Loch Ard Interpretive Centre (incorporating Apostles Shared Trail)</td>
<td>The establishment of a significant interpretive centre at Loch Ard Gorge and upgrade to Parks infrastructure throughout the Port Campbell area. The Apostles shared trail is included in the concept.</td>
</tr>
<tr>
<td>Upgrade of Avalon Airport to International Standard</td>
<td>Establishment of an international terminal and other infrastructure improvements to accommodate international flights.</td>
</tr>
</tbody>
</table>
| Lake Condah/ Budj Bim National Heritage Landscape                           | Major new infrastructure established to promote aboriginal tourism, including:  
  
  - Nature based accommodation;  
  - Development of nodes across the Lake Condah/Mount Eccles area;  
  - Development of a new international learning centre;  
  - Reinstatement and interpretation of eel trapping and stone dwellings;  
  - Heritage trails;  
  - Interpretation of the church mission site;  
  - Education and bush food tours. |
| Geelong Convention and Exhibition Centre including Eastern Beach Spa Complex | Establishment of the Geelong Convention and Exhibition Centre incorporating a spa complex at Eastern Beach. Specific components include:  
  
  - Multipurpose format to accommodate small to medium size events;  
  - Seating for up to 1200 people in banquet setting;  
  - 1000 to 1200 seat auditorium with smaller theatrettes;  
  - 3000 to 4000 square metre pillarless exhibition / display area;  
  - Ancillary facilities including parking, retail and associated facilities;  
  - Provision for a 4-star hotel of at least 200 rooms as part of the complex.  
  - Spa complex |
<p>| Great Ocean Walk                                                            | Upgrade of trail infrastructure to an international standard.                                                                                                                                                          |
| Great Ocean Road and Link Roads Upgrade                                     | Continuous improvement of the Great Ocean Road and link roads to a ‘showcase’ standard to reflect the road’s role for tourism.                                                                                           |</p>
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Description</th>
</tr>
</thead>
</table>
| Cape Otway Lighthouse and Koala Experience Centre | Improvements to the Cape Otway precinct including:  
  • A day visitor and interpretive centre with food and beverage operation;  
  • Raised boardwalks and walking trails for Koala viewing;  
  • Nature based accommodation.  
  • Improvements to Lighthouse interpretation and on site accommodation. |
| Upgrade of Warrnambool Airport (lengthening of runway) | Lengthen and strengthen the Warrnambool Airport to support passenger jets. |
| Great Ocean Road Tourist Shuttle Bus | A shuttle service which operates the full length of the Great Ocean Road allowing visitors to access towns and tourist attractions along the Road. |
| Tower Hill Native Game Reserve | Product and infrastructure included as part of the masterplan concept includes:  
  • High quality walking trails, including board walks;  
  • Bird watching facilities;  
  • Wildlife watching platforms with interpretation;  
  • Geological and aboriginal interpretation;  
  • Improved day visitor facilities including picnic tables, bbqs and toilets;  
  • Fixed tent accommodation. |
| Cruise Ship Infrastructure - Portland and Geelong | Improvements to cruise ship infrastructure to provide improved entry to the Great Ocean Road Region. |
| Surf Coast Villages Trail | Shared cycle and walking trail from Torquay to Lorne |
| Apollo Bay Harbour and Marina Project | Tourism related aspects of the Apollo Bay Harbour Masterplan include:  
  • New Fisherman’s Co-operative Sales and Interpretive Centre;  
  • Harbour Edge Community and Commercial Buildings (restaurants);  
  • New Recreational Marina (including deepening);  
  • New Saltwater Outdoor Lap Pool;  
  • Hotel or Other Visitor Accommodation. |
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portarlington Harbour Upgrade</td>
<td>Project includes the following components:</td>
</tr>
<tr>
<td></td>
<td>• New town square</td>
</tr>
<tr>
<td></td>
<td>• Beachfront boardwalk and commercial development</td>
</tr>
<tr>
<td></td>
<td>• Enhanced aesthetics, amenity, use and safety of open space areas</td>
</tr>
<tr>
<td></td>
<td>• New wider Pier that allows for separation of pedestrians and vehicles.</td>
</tr>
<tr>
<td></td>
<td>• Improved protection for boats.</td>
</tr>
<tr>
<td></td>
<td>• New facilities for boating related activities including:</td>
</tr>
<tr>
<td></td>
<td>• Up to 45 commercial berths.</td>
</tr>
<tr>
<td></td>
<td>• Up to 100 recreational berths.</td>
</tr>
<tr>
<td></td>
<td>• Service berth comprising re-fuelling and pump out.</td>
</tr>
<tr>
<td></td>
<td>• Provision for a possible future regional commuter/tourism ferry service.</td>
</tr>
<tr>
<td>Princes Hwy Upgrade</td>
<td>Duplication of the Princes Highway to Colac and further road improvements through to Warrnambool.</td>
</tr>
<tr>
<td>Airfield near Apollo Bay</td>
<td>The capacity and infrastructure at the airport needs to be reviewed to understand infrastructure development required to meet future demand</td>
</tr>
<tr>
<td>Otway Ranges Touring Route</td>
<td>Designation of a touring route through the Otway Ranges including improved signage and marketing</td>
</tr>
<tr>
<td>Upgrade V Line rolling stock and increase services</td>
<td>New trains purchased for the Warrnambool line.</td>
</tr>
<tr>
<td>Point Grey Redevelopment, Lorne</td>
<td>Redevelopment of the Port Grey precinct, Lorne including:</td>
</tr>
<tr>
<td></td>
<td>• Improved dining experience through a redeveloped facility;</td>
</tr>
<tr>
<td></td>
<td>• Improved Coop facilities including retail;</td>
</tr>
<tr>
<td></td>
<td>• Improved landscaping and trails.</td>
</tr>
<tr>
<td>Warmambool Harbour</td>
<td>Staged works are underway to improve infrastructure and capacity of the Warrnambool Harbour</td>
</tr>
<tr>
<td>Great Ocean Road Heritage Centre</td>
<td>The “Great Ocean Road Heritage Centre” would tell the story of the construction of the Great Ocean Road and become a centre for permanent and temporary displays on the history of the Great Ocean Road. The Great Ocean Road Heritage Centre will be co-located with the Lorne Visitor Information Centre. However it will have a separate entrance, be signed separately and have a dedicated permanent and temporary historical display space that may also be used for functions and events. The links between the Lorne Visitor Centre and the Great Ocean Road Heritage Centre would be open plan and under the same roof to provide benefit to both Centres and good connection and accessibility between the two facilities.</td>
</tr>
</tbody>
</table>
10. PROJECT PRIORITISATION

10.1. INTRODUCTION

This section provides an assessment of projects identified throughout the course of the study with the objective to prioritise projects that best meet the aims of the study.

An assessment framework is provided below which identifies assessment criteria that have been agreed and weighted by the project steering committee.

This assessment has been used to identify tier one projects as priorities for investment in the region, these projects match the assessment criteria best and are considered game changers for the region.

There are other projects which may emerge following completion of this report which have not been considered. The criteria identified below may also be used to determine any other new product or infrastructure project in the future to determine its regional importance.

10.2. METHODOLOGY

OVERVIEW

The methodology for project prioritisation has been undertaken using the following assessment framework (See diagram below). A matrix is provided below which assesses both tourism infrastructure and tourism product development projects. This provides a priority ranking of product development projects and infrastructure projects against the assessment criteria. Appendix F describes how the projects are assessed against individual criteria.

10.3. ASSESSMENT CRITERIA

The following are the key criteria projects will be assessed against (criteria have been weighted in terms of their importance as agreed with the steering committee).

HIGHEST WEIGHTED CRITERIA (RANKING OUT OF 40)

Game changer. Project will significantly change tourism in the region by enabling significant new investment.

HIGH WEIGHTED CRITERIA (RANKING OUT OF 30)

Matches to/enables demand by experience seeker segments. Preferences for key target international and interstate experience seeker markets have been met;

Creates/ enables an iconic experience. Projects which provide or facilitate an iconic experience in the Great Ocean Road Region which becomes a motivator for travel;

Encourages yield, length of stay of visitors. Projects which encourage greater visitor yield as opposed higher levels of lower yielding visitors;

Creates/ enables additional capacity. Projects which create more capacity within the region to accommodate projected growth;
Facilitates/ enables new niche higher yielding visitor markets. Projects which provide a new experience which encourages new higher yield markets to visit which may not currently being accommodated in the region.

MEDIUM WEIGHTED CRITERIA (RANKING OUT 20)

Encourages/ enables seasonal dispersal of visitors. Projects which encourage visitation during the off peak and shoulder periods;

Encourages/ enables geographic dispersal of visitors. Projects which encourage dispersal of visitors to geographic locations which do not attract high levels of peak visitation.

LOW WEIGHTED CRITERIA (RANKING OUT OF 10)

Matches/ enables demand from Melbourne short break market. These are locations of product and product typologies that meet the high yield Melbourne short break market.

10.4. PRIORITISATION OF TOURISM PROJECTS

The tables below provide an assessment of tourism projects in the Great Ocean Road Region for prioritisation. When weighted against the assessment criteria, the following projects are considered highest priority:

- Port Campbell Precinct and Loch Ard Interpretive Centre;
- Great Ocean Walk;
- Great Ocean Road Signature Accommodation, Moonlight Head;
- Lake Condah/ Budj Bim National Heritage Landscape;
- Upgrade of Avalon Airport to International Standard;
- Great Ocean Road and Link Roads Upgrade;
- Great Ocean Road Integrated Resort, Port Campbell Area;

It should be noted that the proposal to develop the Geelong Convention and Exhibition Centre is a project which differs from the other priority projects identified in that it is not directly related to an ‘experience’ suited to the experience seeker market segments, which is identified as a key driver for this project.

The project, however, would meet an infrastructure gap identified as part of the infrastructure audit in this report. The project has also been identified as a priority project in Tourism Victoria’s Regional Tourism Action Plan 2009-2012 and the G21 Geelong Regional Plan.

Notwithstanding the lack of a direct link to the preferences of the experience seeker market, for the purposes of this report this project has been identified as a priority project. It is considered that it will facilitate an increase in yield through greater length of stay in the region, increased capacity in the region and will attract new high yield visitor markets to the region. In addition, the project has the potential to provide a significant positive impact on the tourism industry in the region through drawing a significant number of visitors to the region that otherwise would not visit, with the potential for repeat visitation. Pre and post conference touring by delegates provides region-wide tourism benefits from these additional visitors.

The Geelong Convention and Exhibition Centre therefore has been excluded from the assessment matrix on the following page as it does not meet the leisure/experience seeker drivers for the project, however due to the reasons identified above it has been included in the list of priority projects.
## Tourism Product Development Projects Assessment Matrix

<table>
<thead>
<tr>
<th>Project</th>
<th>Project is a ‘game changer’. Where by it will significantly change tourism in the Region</th>
<th>Highest Weighted Criteria (Out of 40)</th>
<th>Medium Weighted Criteria (Out of 20)</th>
<th>Lowest Weighted Criteria (Out of 10)</th>
<th>Total Score</th>
<th>Investment Model</th>
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<tbody>
<tr>
<td><strong>TIER ONE PROJECTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great Ocean Road Signature Accommodation, Moonlight Head</td>
<td>Project matches/enables demand by experience seeker segments</td>
<td>38</td>
<td>30</td>
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<td>25</td>
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</tr>
<tr>
<td>Great Ocean Road Integrated Resort, Port Campbell Area</td>
<td>Project creates/enables an iconic experience</td>
<td>30</td>
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</tr>
<tr>
<td>Apollo Bay Internationally Branded Hotel</td>
<td>Project encourages yield, length of stay of visitors</td>
<td>30</td>
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<td>20</td>
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<tr>
<td>Nature Based Eco Accommodation</td>
<td>Project creates/enables additional capacity</td>
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<td>Improving the Bells Beach Experience and Redevelopment of Surf City</td>
<td>Project facilitates/enables new niche higher yielding visitor markets</td>
<td>35</td>
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<td>20</td>
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<tr>
<td>Seafood Experience and Dining</td>
<td>Project encourages/enable seasonal dispersal of visitors</td>
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<td>Water-Based Tours and Activities</td>
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<tr>
<td>Geothermal bathhouse development at Port Fairy</td>
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<td>5</td>
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<tr>
<td>Flagstaff Hill Continuous Improvement</td>
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<td>Great Ocean Road Events</td>
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<td>TIER THREE PROJECTS</td>
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<td></td>
<td></td>
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<tr>
<td>Development of Warrnambool Golf Course</td>
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<td>Development of the Geelong Cultural Precinct</td>
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<td>9</td>
<td>18</td>
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## Tourism Infrastructure Projects Assessment Matrix

<table>
<thead>
<tr>
<th>Infrastructure Projects</th>
<th>Highest Weighted Criteria (Out of 30)</th>
<th>Medium Weighted Criteria (Out of 20)</th>
<th>Lowest Weighted Criteria (Out of 10)</th>
<th>Investment Model</th>
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<tr>
<td><strong>TIER ONE PROJECTS</strong></td>
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<tr>
<td>Port Campbell Precinct and Loch Ard Interpretive Centre</td>
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<td>Great Ocean Walk</td>
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<tr>
<td>Lake Condah/ Budj Bim National Heritage Landscape</td>
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<tr>
<td>Upgrade of Avalon Airport to International Standard</td>
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<td>20</td>
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<td>30</td>
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<tr>
<td>Great Ocean Road and Link Roads Upgrade</td>
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<td><strong>TIER TWO PROJECTS</strong></td>
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<tr>
<td>Tower Hill Native Game Reserve</td>
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<tr>
<td>Cape Otway Lighthouse and Koala Experience Centre</td>
<td>32</td>
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</tbody>
</table>

**Project is a ‘game changer’. Where by it will significantly change tourism in the Region**

**Matches/ enables demand by experience seeker segments**

**Creates/ enables an iconic experience**

**Encourages yield, length of stay of visitors**

**Creates/ enables additional capacity**

**Facilitates/ enables new niche higher yielding visitor markets**

**Encourages/ enables seasonal dispersal of visitors**

**Encourages/ enables geographic dispersal of visitors**

**Match to demand from Melbourne short break market**

**Total Score**
<table>
<thead>
<tr>
<th>Project Description</th>
<th>Start Year</th>
<th>End Year</th>
<th>Total Est.</th>
<th>Cost Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upgrade of Warrnambool Airport (lengthening of runway)</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
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<tr>
<td>Cruise Ship Infrastructure - Portland and Geelong</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
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<tr>
<td>Great Ocean Road Tourist Shuttle Bus</td>
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<td>2011</td>
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<tr>
<td>Apollo Bay Harbour and Marina Project</td>
<td>2009</td>
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<td>Princes Hwy Upgrade</td>
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<tr>
<td>Portarlington Harbour Upgrade</td>
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<tr>
<td>Surf Coast Villages Trail</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
</tr>
<tr>
<td>Airfield near Apollo Bay</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
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<td>Otway Ranges Touring Route</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
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<tr>
<td>Point Grey Redevelopment, Lorne</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
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</table>

**TIER THREE PROJECTS**

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Start Year</th>
<th>End Year</th>
<th>Total Est.</th>
<th>Cost Estimates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warrnambool Harbour</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
</tr>
<tr>
<td>Upgrade V Line rolling stock and increase services</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
</tr>
<tr>
<td>Great Ocean Road Heritage Centre</td>
<td>2008</td>
<td>2011</td>
<td>2008</td>
<td>12551</td>
</tr>
</tbody>
</table>
11. PRIORITY PROJECTS

11.1. INTRODUCTION

This section identifies the key projects which are of the highest priority for the Great Ocean Road Region. These projects are considered game changes for the Great Ocean Road Region, and will have significant flow on benefits for the region in terms of attracting additional private sector investment and attraction of new high yielding visitor markets.

11.2. PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE

PROJECT BACKGROUND/RATIONALE

The Loch Ard Gorge interpretive centre is a proposed facility incorporating a state of the art interpretive and education facility, food and beverage facilities, tours and information centre. Extensive feasibility and planning work has been undertaken for the interpretive centre including architectural concept plans. The centre is proposed for the northern side of the Great Ocean Road with an under road tunnel linking to Loch Ard Gorge. The project has significant support from Local Government, the tourism industry and businesses.

Port Campbell National Park attracts over 2 million visitors annually, of which a large proportion are daytrip visitors. The visitor experience of the National Park is limited to trails, static information displays and viewing platforms. In order to meet the expectations of experience seeker visitors, there is a need to further invest in infrastructure which provides a positive value adding experience that generates additional spend in the region. This includes nature based activities but also includes potential food related dining opportunities in appropriate locations.

The project will hold visitors in the region for longer, whilst providing them with a more rewarding visitor experience. This will create additional benefits for local businesses through additional demand for accommodation, food, tours and attractions businesses.

MATCH TO VISITOR MARKET SEGMENTS

The Port Campbell Precinct and Loch Ard Interpretive Centre includes a number of nature based and interpretive experiences. The key international experience seeker segments which will be attracted to this product include:

- Chinese experience seekers;
- German experience seekers;
- Japanese experience seekers;
- English experience seekers;
- American experience seekers;
- Indian experience seekers.

Domestic values segments which are matched to this product include:

- Socially aware;
- Visible achievement;
- Traditional Family Life.

The extensive list of key segments matched to this product highlights the wide ranging impact of this project for tourism, and reaffirms this projects ranking of highest importance to the Great Ocean Road Region.
CONCEPT

The concept is a precinct approach to investment to ensure that most sites in the Port Campbell area are improved to provide a more rewarding visitor experience. The flagship of the concept is a major interpretive centre in the Loch Ard Gorge area.

Components of investment include:

- Loch Ard Interpretive Centre;
- Improved interpretation, trails and other infrastructure at other locations (Bay of Islands);
- Apostles Trail - Shared bicycle and walking trail, linking to Timboon, Port Campbell Township and on to the Bay of Islands;
- Food experiences with views;
- Merchandising.

LINKS TO FURTHER PRIVATE SECTOR INVESTMENT

The project is important as it will assist in creating demand for additional private sector investment in accommodation and tours and activities with a focus on nature based tourism. This investment will be focused in the precinct from Moonlight Head to Peterborough. Private sector investment which may leverage from initial public sector investment in the project includes:

- Signature accommodation;
- Integrated resort development;
- Water based tours from Port Campbell;
- Investment in existing accommodation establishments in Port Campbell;
- Further investment in retail and food related commercial investment in Port Campbell.

DELIVERY STRATEGY

- Establish a new working group to oversee masterplanning between Glenample and the Bay of Islands;
- Review the Loch Ard Interpretive Centre Plans;
- Prepare a precinct masterplan.

STAKEHOLDERS

Parks Victoria, Shipwreck Coast Tourism, Tourism Victoria, Corangamite Shire, Warrnambool City Council, Great South Coast group of Councils.

ESTIMATED PROJECT CONSTRUCTION COST

$100 Million* (Public sector investment)

* Estimated costs sourced from Parks Victoria. Costs would need to be revised following a full scoping of all components.

11.3. GREAT OCEAN WALK

PROJECT BACKGROUND/RATIONALE

The Great Ocean Walk has developed into one of the key iconic experiences within the Region. The walk whilst navigable has a number of areas where further infrastructure improvements and trail development is required.

Further investment in trail infrastructure is required to transform the Great Ocean Walk to a walk of international status.

The walk provides opportunity to capture visitors in the region longer, and also encourages further investment from the private sector in nature based accommodation and other tours and activities visitors.
MATCH TO MARKET SEGMENTS

The Great Ocean Walk provides a unique and iconic walking experience. The key international experience seeker segments which will be attracted to this product include:

- German experience seekers;
- Continental European experience seekers;
- English experience seekers;
- American experience seekers.

Domestic values segments which are matched to this product include:

- Socially aware;
- Visible achievement;

The Great Ocean Walk will have a selected target market as demonstrated above. These are higher yielding segments and participate in active outdoor activities.

CONCEPT

Investment in new trails and improving the existing trail network to make the Great Ocean Walk a trail of international iconic standard.

LINKS TO PRIVATE SECTOR INVESTMENT

The Great Ocean Walk provides significant opportunity for the private sector to leverage off the public investment in infrastructure. Specifically the opportunities relate to nature based accommodation in proximity to the trail and tours and activities businesses operating walking tours along the trail.

OVERALL PROJECT CONSTRUCTION COST

$10 Million* (Estimate sourced from Parks Victoria).

11.4. GREAT OCEAN ROAD SIGNATURE ACCOMMODATION, MOONLIGHT HEAD

PROJECT BACKGROUND/RATIONALE

There is no ‘iconic’ signature accommodation in the Great Ocean Road Region. However there are a number of settings which provide opportunity for world class branded accommodation. Areas around Moonlight Head provide a unique wilderness setting for this type of accommodation.

Permits are in place for a high quality 5 star hotel at Moonlight Head, there has been little evidence that this project will proceed in the immediate term.

Victoria is the only State in Australia which does not have a ‘luxury lodge’ as identified by luxurylodgesofaustralia.com.au.

MATCH TO MARKET SEGMENTS

The Great Ocean Road Signature Accommodation will match best with the following international experience seeker markets:

- Chinese experience seekers;
- American experience seekers;
- Indian experience seekers.

Two of these markets are identified for high growth; this highlights the importance of this product in capturing growth from the Chinese and American markets.

Domestic values segments which are matched to this product include Visible Achievement.

The Signature accommodation is also likely to be popular in for high wealth non-experience seekers, who wish to explore the Great Ocean Road but in a passive way.
CONCEPT
A luxury signature accommodation establishment at Moonlight Head Area with outstanding coastal views. Facilities would include:

- 25 luxury suites;
- Day spa;
- Restaurant;
- Guest lounge and bar.

LINKS TO PRIVATE SECTOR INVESTMENT
The project will be private sector funded accommodation. The signature accommodation however will attract new higher yielding visitor markets who would not have otherwise visited the region. This will have flow on benefits for other tours and attractions businesses in the region.

The project will be important from a marketing perspective and provide a new iconic image to promote the region to international segments.

DELIVERY STRATEGY
- Rezone land in Moonlight Head as indicated in the Corangamite Tourism Opportunities Study;
- Develop an investment prospectus promoting the opportunity.

ESTIMATED PROJECT CONSTRUCTION COST
$20 Million*

* Estimate based on costs for Southern Ocean Lodge. Detailed costs would be established following further design work and infrastructure cost estimates.

11.5. LAKE CONDAH/ BUDJ BIM NATIONAL HERITAGE LANDSCAPE

BACKGROUND/RATIONALE
The aboriginal history and heritage of the Lake Condah area is highly significant. The following extract highlights the significant and unique aboriginal heritage of the area:

For thousands of years the Gunditjmara people flourished through their ingenious methods of channelling water flows and systematically harvesting eels to ensure a year round supply. Here the Gunditjmara lived in permanent settlements, dispelling the myth that Australia’s Indigenous peoples were all nomadic.

Dating back thousands of years, the area shows evidence of a large, settled Aboriginal community systematically farming and smoking eels for food and trade in what is considered to be one of Australia’s earliest and largest aquaculture ventures.

More than 30 000 years ago the Gunditjmara witnessed an important creation being reveal himself in the landscape. Budj Bim (known today as Mount Eccles) is the source of the Tyrendarra lava flow, which as it flowed to the sea changed the drainage pattern in this part of western Victoria, creating large wetlands.

The Gunditjmara people developed this landscape by engineering channels to bring water and young eels from Darlots Creek to low lying areas. They created ponds and wetlands linked by channels containing weirs. Woven baskets were placed in the weir to harvest mature eels.

These engineered wetlands provided the economic basis for the development of a settled society with villages of stone huts, built using stones from the lava flow. Early European accounts of Gunditjmara describe how they were ruled by hereditary chiefs.

(http://www.lakecondah.com/budjbim.html)

The Lake Condah area provides a new and interesting story around aboriginal culture and contrasts greatly with the nomadic aboriginal culture of northern Australia. The story at Lake Condah has been strengthened considerably with the construction of a weir which has led to the reinstatement of Lake Condah as a permanent water body. This and other
projects have been delivered as an outcome of the Lake Condah Sustainable Development Project.

MATCH TO MARKET SEGMENTS
Budj Bim National Heritage Landscape includes a number of nature based and interpretive experiences. The key international experience seeker segments which will be attracted to this product include:

- German experience seekers;
- English experience seekers;
- American experience seekers;

Domestic values segments which are matched to this product include:

- Socially aware;
- Visible achievement;

The experience seeker list above highlights the importance of the project for the traditional key experience seeker market segments in Australia.

CONCEPT
A masterplan was developed in 2002 that includes initiatives such as the reinstatement of Lake Condah. Tourism initiatives by the Lake Condah Sustainable Development Project which still hold currency include:

- Restore the Lake Condah Church site as a place of reconciliation and healing;
- Develop an international learning centre at Lake Condah;
- Develop employment and enterprise activities focused on tourism accommodation, aquaculture, bush tucker, and supporting industries.

A new detailed masterplan should be supported which provides a review of the existing 2002 masterplan and provides detail around a number of the initiatives identified above, specific opportunities include:

- Nature based accommodation;
- Development of nodes across the Lake Condah/Mount Eccles area;
- Development of a new international learning centre;
- Reinstatement and interpretation of eel trapping and stone dwellings;
- Heritage trails;
- Interpretation of the church mission site;
- Education and bush food tours.

LINKS TO PRIVATE SECTOR INVESTMENT
Public sector investment in the Park’s infrastructure and interpretation will provide a driver for tours and activity businesses and accommodation in the immediate region. The Park could strengthen its relationship with Tower Hill Game Reserve to provide a network of aboriginal cultural sites for visitors to tour in the region. As such the project may also provide the incentive for private sector development at Tower Hill Reserve.

The Lake Condah is approximately 1 hour from Warrnambool, half an hour from Portland and 45 minutes from Port Fairy. There is potential for these existing tourist towns to leverage off the development of the Lake Condah area, given little accommodation currently exists in the Lake Condah region.

DELIVERY STRATEGY
- Establish a steering group for the project;
- Prepare a Brief for the masterplan;
Engage a consultant to review the previous masterplan and update with reference to visitor preferences;

Implement the masterplan actions through capital investment.

PROJECT STAKEHOLDERS
Parks Victoria, Lake Conda Sustainable Development Project Group, Tourism Victoria.

ESTIMATED PROJECT CONSTRUCTION COST
$50 million* (public and private sector investment)

*Project cost is an estimate only, further detailed master plan work is required to provide a detailed cost estimate.

11.6. AVALON AIRPORT UPGRADE

PROJECT BACKGROUND/RATIONALE
There is potential for Avalon Airport to be developed for international arrivals and departures. Some upgrades to infrastructure will be required to facilitate this.

International arrivals directly into Avalon Airport will reduce travel times to Great Ocean Road Region destinations. An international airport will allow visitors to travel direct from the airport into the region for the first night’s stay. The upgrade of Avalon Airport will be a significant game changer for the region as it will effectively provide Geelong and the Great Ocean Road Region with its own international airport. This will allow Geelong and surrounding areas to further develop into a significant international destination allowing for easy dispersal to some of the iconic product in the Great Ocean Road Region.

In addition the upgrade of Avalon Airport will provide a second international airport in Victoria which will allow for additional capacity for visitors to enter the state.

MATCH TO MARKET SEGMENTS
Avalon Airport includes upgrade will be used by a range of international visitors including experience seekers.

CONCEPT
A new international terminal of 7500m2 will be completed to accommodate international arrivals.

A masterplan is currently being development which will identify the type of investment required to support the facility.

LINKS TO FURTHER PRIVATE SECTOR INVESTMENT
Avalon Airport upgrade will provide a new entry point to the Great Ocean Road Region and will assist facilitation of new investment in accommodation, events and attractions targeted to the international market. Avalon Airport will assist Great Ocean Road Region in becoming a stronger international destination.

In particular the airport will strengthen Geelong and the surrounding region as an international events destination.

DELIVERY STRATEGY

• Complete masterplan
• Invest in facility upgrade
• Implement policy to facilitate international arrivals.

STAKEHOLDERS
Geelong Otway Tourism, City of Greater Geelong, Fox Group

ESTIMATED PROJECT CONSTRUCTION COST
$15 Million* (public and private sector investment)

*Estimate sourced from G21 and will be refined when detailed plans are finalised and publicised.
11.7. GREAT OCEAN ROAD UPGRADE

The Great Ocean Road is the key piece of infrastructure in the region which is also the key product of the region. It provides the iconic driving experience and also links the numerous tourism villages and destinations along the coast. It is essential that the road is maintained and developed to meet forecast demand from visitors.

The road is not currently prioritized as a road of national significance, however its importance for the region’s economy cannot be understated.

There is potential for the Great Ocean Road to become a ‘showcase’ road to reflect its importance for touring. This would see the road being redeveloped with premium road surfaces, shoulder sealing and improvements to link roads which provide access to the Great Ocean Road.

CONCEPT

- Improvement to the Great Ocean Road and Link Roads to ‘Showcase’ standard. Further ongoing investment should be provided to fund:
  - Increased safety improvements;
  - Improvement to areas where landslip occurs;
  - General maintenance and pruning of trees and grooming of vegetation;
  - Significant improvement to road surface;
  - Shoulder sealing for cyclists;
  - Improvement to road reserves.

See Appendix H for an outline of road improvements provided by Vic Roads to bring the Great Ocean Road to ‘Showcase’ standard.

LINKS TO PRIVATE SECTOR INVESTMENT

The Great Ocean Road will significantly improve visitors touring and travel experience whilst also further enabling road cycling to occur along the Great Ocean Road, thereby creating a new iconic experience.

The project is an enabler and critical for the future security of the Great Ocean Road Region as key tourism destination.

DELIVERY STRATEGY

Attract additional funding to implement recommendations (see Appendix H)

Implement upgrades on an annual basis

STAKEHOLDERS

Great Ocean Road Regional Tourism Board, Vic Roads, DSE, Parks Victoria.

ESTIMATED PROJECT CONSTRUCTION COST

$50 million over 5 years (approximately $10 Million per annum) See Appendix H. Additional allowance has been made for cycling infrastructure.

11.8. GREAT OCEAN ROAD INTEGRATED RESORT, PORT CAMPBELL AREA

PROJECT BACKGROUND/RATIONALE

There are no internationally branded integrated resorts along the Great Ocean Road near Port Campbell National Park. There is potential to develop an integrated resort development which provides a number of accommodation options for visitors.

This will ensure that touring markets are appropriately catered for in close proximity to the iconic product, and provide incentive for visitors to stay longer in the region.
MATCH TO MARKET SEGMENTS

Great Ocean Road Integrated Resort will provide a number of accommodation options which will suit most visitor markets. The key international experience seeker segments which will be attracted to this product include:

- Chinese experience seekers;
- German experience seekers;
- Japanese experience seekers;
- English experience seekers;
- American experience seekers;
- Indian experience seekers.

Domestic values segments which are matched to this product include:

- Socially aware;
- Visible achievement;
- Traditional Family Life.

The extensive list of key segments matched to this product highlights the wide ranging impact of this project for tourism and highlights the potential for the project to hold visitors in the Port Campbell area.

CONCEPT

A 4 star internationally branded resort in the Port Campbell area with outstanding coastal views. This would cater for large coach groups and independent touring visitors.

The integrated resort will include:

- Large bistro/restaurant;
- Self-contained accommodation;
- Hotel accommodation;
- Cabins;
- Tourist park facility for vans.

LINKS TO PRIVATE SECTOR INVESTMENT

The project will be private sector funded accommodation. The accommodation however will provide greater capacity for the region to accommodate international touring markets and coach groups. This will have positive benefits for a range of existing and potential tourism product in the region in terms of creating additional demand for product through increased length of stay.

DELIVERY STRATEGY

Rezone land west of Port Campbell as indicated in the Corangamite Tourism Opportunities Study;

Develop an investment prospectus promoting the opportunity.

ESTIMATED PROJECT CONSTRUCTION COST

$35 Million*

*Estimate is based on costs for similar facilities - e.g.: RACV Inverloch Resort. Detailed costs would be prepared following further detailed design.

11.9. GEELONG CONVENTION AND EXHIBITION CENTRE

PROJECT BACKGROUND/RATIONALE

Business events currently generate approximately $1 billion per annum or 9% of Victoria’s total tourism revenues. Geelong businesses already generate over 2,000 events per annum that are accommodated in inadequate venues. An additional 16% of events are lost to Melbourne because of deficient facilities.
A Geelong Region Convention and Exhibition Centre will position the region as a viable, well-located option that complements Melbourne and stamps Victoria as a global and national competitor for business events.

The Geelong Convention and Exhibition Centre, whilst not specifically targeting experience seeker markets will provide greater profile of the Great Ocean Road Region in international business markets and will enable visitation to the region through attraction of visitors to the venue.

In addition the Centre will encourage visitation throughout the Great Ocean Road Region through pre and post trip tours and provide event organisers with the option to include field visits in their schedule to increase the attractiveness of events.

The Convention and Exhibition Centre is a significant game changer for the Great Ocean Road through increasing exposure of the region to new markets and providing a new destination at the regions gateway city.

MATCH TO MARKET SEGMENTS

Great Ocean Road Convention and Exhibition Centre is not proposed to capture the experience seeker markets. Rather it provides infrastructure which will draw large business events to Geelong and potentially provide exposure of the region to new segments and also distribute delegates through the region. The Convention and Exhibition Centre will target both domestic and international business events.

CONCEPT

To deliver a purpose built, private public partnership funded centre for conventions and exhibitions including:

- Plenary capacity of 1000 delegates;
- Exhibition hall of 3000 m2;
- Break out rooms;
- Multipurpose format to accommodate small to medium size events;
- Provision for a 4-star hotel of 150-200 rooms as part of the complex.

DELIVERY STRATEGY

- Complete the business case;
- Undertake detailed concept design;
- Undertake detailed drawings;
- Seek funding support from public and private sectors.

STAKEHOLDERS

City of Greater Geelong, Geelong Otway Tourism, Tourism Victoria.

ESTIMATED PROJECT DEVELOPMENT COST

$200 Million*

* Estimate sourced from City of Greater Geelong
12. ECONOMIC IMPACT ANALYSIS

12.1. INTRODUCTION
This section outlines the economic impact arising from the Great Ocean Road priority investment projects. The methodology used is based upon an adaptation of the expenditure approach to economic sizing used by the ABS. Economic impact from the construction and operating phase is calculated using REMPLAN (Compelling Economics). This analysis is supplemented by an estimate of market consumption for each priority project, prepared by Urban Enterprise.

12.2. KEY FINDINGS

ECONOMIC IMPACT OF PRIORITY PROJECTS
In the short term (construction phase) the eight priority projects will create an estimated 2,796 jobs in the short term and contribute over $1 Billion to the State’s GRP. On an annual basis the eight priority projects will collectively contribute 1,901 jobs to Victoria and contribute $700 million to the State’s GRP.

<table>
<thead>
<tr>
<th>Economic Impact of Priority Projects</th>
<th>Short Term (Construction Phase)</th>
<th>Long Term (Operational Phase)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Economic Impact</td>
<td>$1.1 billion</td>
<td>$696 million</td>
</tr>
<tr>
<td>Total Employment</td>
<td>2,796</td>
<td>1,901</td>
</tr>
</tbody>
</table>

* Note Economic impact calculations are estimated on information available at writing of the report. When further detailed assessment of projects is undertaken in relation to project costs, the economic impact of projects should be revised.

12.3. METHODOLOGY OF THE ECONOMIC IMPACT ASSESSMENT METHODOLOGY
Economic impact will be defined as the resultant change in employment and Gross Regional Product as a consequence of making investments in tourism product and infrastructure. For the purposes of this report, the economic impact assessment will be analysed from both a short-term (construction phase) and long-term (operational phase) perspective. The table below provides a summary of the different methodologies used in the assessment of the tourism product and infrastructure developments. Each methodology is discussed in detail below.

TABLE 36 ECONOMIC IMPACT METHODOLOGY MATRIX

<table>
<thead>
<tr>
<th></th>
<th>Tourism Product Development</th>
<th>Tourism Infrastructure Developments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Term Analysis</td>
<td>REMPLAN</td>
<td>REMPLAN</td>
</tr>
<tr>
<td>Long Term Analysis</td>
<td>REMPLAN</td>
<td>Qualitative Assessment</td>
</tr>
</tbody>
</table>

12.3.1. SHORT TERM ANALYSIS (CONSTRUCTION PHASE)
The short term analysis relates to the impacts of the construction phase of the tourism product and infrastructure projects on the Victorian economy. Economic impacts during this phase are derived using the regional economic modelling software REMPLAN, developed by Compelling Economics Pty Ltd. The economic impact assessment is based on the input-output analysis framework utilising ABS data sets. The method focuses on the impact on economic expenditure and employment for the municipalities of Surf Coast Shire, City of Greater Geelong, Colac-Otway Shire, Borough of Queenscliffe, Corangamite Shire, City of Warrnambool, Moyne Shire, Glenelg Shire and Golden Plains Shire.
Economic impact is measured in two ways: Direct Economic Impact and Indirect Economic Impact. Economic impact is defined as the estimated initial (capital) expenditure of the tourism development. This will be derived using estimated construction costs. Economic impact will be defined as the consequential production and consumption expenditures that are anticipated to occur as a result of the direct economic impact. Total Economic Impact is the combination of the Direct and Indirect economic impact of the tourism product and infrastructure developments.

Appendix G provides the Remplan outputs and further detail on modelling used.

### 12.3.2. LONG TERM ANALYSIS (OPERATIONAL PHASE)

The long term analysis relates to the economic impacts or contribution of the operational phase of each proposed development. For the purposes of this report, the long-term economic impact of the tourism product developments will be derived from the change in employment and Gross Regional Product during the operational phase. This data will be calculated using REMPLAN which uses a combination of ABS datasets and qualitative and quantitative industry estimates of on-going employment generated by the new facilities.

The long-term impact of the tourism infrastructure developments will be assessed via a qualitative analysis of the projected investment and capacity building which will be facilitated in the region by the new projects. It is difficult to assess infrastructure projects using a singular economic impact methodology as each project will vary considerably in its capacity to generate increased investment into the region and higher visitation to new or existing tourism assets. As such, each tourism infrastructure development project will be discussed on a case by case basis.

### MARKET SEGMENTATION OF LONG-TERM ECONOMIC IMPACT

The long-term economic assessment will also involve an analysis of the change in the share of visitor markets by visitor market types (Victorian, Interstate and International visitors). Urban Enterprise have assessed the existing and projected share of visitor markets based on assumptions derived from local, state or national benchmarks. The table below depicts the benchmarks which will be used to analyse the existing share of the Victorian, interstate and international markets by tourism project development. Extrapolation of Tourism Research Australia and visitation forecasts data will inform the expected changes in visitor market share from 2014 to 2034. For the purpose of this analysis Urban Enterprise assumes the completion of the tourism projects by 2014.

### TABLE 37 APPROACH TO DETERMINING LIKELY MARKETS FOR PROJECTS

<table>
<thead>
<tr>
<th>Investment Type</th>
<th>Tourism Projects</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>Port Campbell Precinct and Loch Ard Interpretive Centre</td>
<td>Estimated Visitor Trends (Parks Victoria, 2009) and Phillip Island Park Strategic Framework: Issues and Opportunities Paper (Urban Enterprise, 2011)</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Great Ocean Walk Upgrade and Development</td>
<td>Tourism Research Australia 2010 Visitors to the Colac-Otway and Corangamite Shire Regions who undertook Bushwalking Activities (Tourism Research Australia 2010)</td>
</tr>
<tr>
<td>Product</td>
<td>Great Ocean Road Signature Accommodation, Moonlight Head</td>
<td>Data on Visitors to the Western and Geelong Regions staying in Hotels/Motels and Data on Visitors to Northern Territory staying in Luxury Hotel Accommodation (Tourism Research Australia, 2010)</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Lake Condah/Budj Bim National Heritage Landscape Development</td>
<td>Data on Indigenous Visitors to Australia (Tourism Research Australia 2009)</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Avalon Airport Upgrade</td>
<td>australiaviation.com.au, 2011) and Data on Visitors to Victoria who travelled by Air Transport (Tourism Research Australia, 2010)</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Great Ocean Road and Links Upgrade</td>
<td>Tourism Research Australia 2010 Data on Visitors to the Western Region using Road Transport (Cars, Rented Vehicles, Coach/Buses, Campervans/Trailers) (Tourism Research Australia, 2010)</td>
</tr>
<tr>
<td>Product</td>
<td>Great Ocean Road Integrated Resort</td>
<td>Data on Visitors to the Western and Geelong Regions staying in Hotels/Motels</td>
</tr>
</tbody>
</table>
12.3.3. LIMITATION TO THE ECONOMIC IMPACT ASSESSMENT

There are a number of limitations to the economic impact assessment that need to be considered prior to reading this section, these include:

a. Short term economic impact assessments are based on estimated project construction costs. As a number of these project concepts are in their infancy and have limited detail in terms of detailed masterplanning and quantification of likely costs, estimates have been used to determine base costs for investment. With further planning these are likely to be revised;

b. Operational phase economic impact modelling cannot account effectively for all impacts from projects, specifically infrastructure projects which are ‘enablers’. There are a number of projects which have unquantifiable benefits in addition to their own operational impact. These include a project’s ability to attract private investment which leverages off public investment, the marketing benefits of world class development, the benefits in attracting new visitor markets and the general benefits of ‘enabling’ visitors to traverse, travel and disperse through regions.

Based on the above the economic impact assessments provided in this section would need to be reviewed when further detail about each project arises and in some cases detailed research is required to estimate long term operational impacts from projects which cannot be easily modeled using Remplan.

12.4. THE PROJECTS – OVERVIEW OF ECONOMIC IMPACT ANALYSIS RESULTS

Based on stakeholder assessment and further research, the table below provides the proposed tourism product and infrastructure development projects to be included in this analysis. Overall, the total capital value of these projects amounts to $480 million.

TABLE 38 COSTS SCHEDULE OF PRIORITY PROJECTS

<table>
<thead>
<tr>
<th>Priority Projects</th>
<th>Project Cost ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Campbell Precinct and Loch Ard Interpretive Centre</td>
<td>$100,000,000</td>
</tr>
<tr>
<td>Great Ocean Walk Upgrade and Development</td>
<td>$10,000,000</td>
</tr>
<tr>
<td>Great Ocean Road Signature Accommodation, Moonlight Head</td>
<td>$20,000,000</td>
</tr>
<tr>
<td>Lake Condah/ Budj Bim National Heritage Landscape Development</td>
<td>$54,000,000</td>
</tr>
<tr>
<td>Avalon Airport Upgrade</td>
<td>$15,000,000</td>
</tr>
<tr>
<td>Great Ocean Rd and Links Upgrade</td>
<td>$50,000,000</td>
</tr>
<tr>
<td>Great Ocean Road Integrated Resort</td>
<td>$35,000,000</td>
</tr>
<tr>
<td>Geelong Convention and Exhibition Centre including Eastern Beach Spa Complex</td>
<td>$200,000,000</td>
</tr>
<tr>
<td>Total Construction Cost</td>
<td>$480,000,000</td>
</tr>
</tbody>
</table>
12.4.1. PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE

SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)

The Port Campbell Precinct and Loch Ard Interpretive Centre is estimated to have a total short term economic impact of $282 million on the Victorian economy during its construction phase. The project is estimated to contribute over 710 full-time jobs in the short-term.

<table>
<thead>
<tr>
<th>TABLE 39</th>
<th>SHORT-TERM ECONOMIC IMPACT OF THE PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Campbell Precinct and Loch Ard Gorge Interpretive Centre</td>
<td>Direct Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$100,000,000</td>
</tr>
<tr>
<td></td>
<td>Indirect Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$181,500,000</td>
</tr>
<tr>
<td></td>
<td>Total Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$281,500,000</td>
</tr>
<tr>
<td></td>
<td>Estimated Number of People Employed on the Project</td>
</tr>
<tr>
<td></td>
<td>283</td>
</tr>
<tr>
<td></td>
<td>Indirect Employment</td>
</tr>
<tr>
<td></td>
<td>427</td>
</tr>
<tr>
<td></td>
<td>Total Employment Impact</td>
</tr>
<tr>
<td></td>
<td>710</td>
</tr>
</tbody>
</table>


LONG TERM ECONOMIC IMPACT (OPERATIONAL PHASE)

In the long-term, the project is estimated to have a total economic impact of $20 million on the Victorian economy per year. The project is estimated to create 99 full-time jobs per annum in the course of its operations.

This economic impact assessment only accounts for the economic impact of the interpretive centre facility and does not include the flow on benefits from greater levels of visitation, length of stay and marketing exposure from the new centre. The economic impact assessment also does not account for the impact of investment in infrastructure such as the Apostle’s Trail and improved access and trial infrastructure within Port Campbell National Park on attracting and holding visitors in the region longer.

<table>
<thead>
<tr>
<th>TABLE 40</th>
<th>ANNUAL LONG-TERM ECONOMIC IMPACT OF THE PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Campbell Precinct and Loch Ard Gorge Interpretive Centre</td>
<td>Direct Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$9,856,928</td>
</tr>
<tr>
<td></td>
<td>Indirect Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$9,778,072</td>
</tr>
<tr>
<td></td>
<td>Total Economic Impact</td>
</tr>
<tr>
<td></td>
<td>$19,635,000</td>
</tr>
<tr>
<td></td>
<td>Estimated Number of People Employed Directly</td>
</tr>
<tr>
<td></td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>Indirect Employment</td>
</tr>
<tr>
<td></td>
<td>39</td>
</tr>
<tr>
<td></td>
<td>Total Employment Impact</td>
</tr>
<tr>
<td></td>
<td>99</td>
</tr>
</tbody>
</table>

MARKET SHARE OF LONG TERM CONSUMPTION

Between 2014 and 2034, it is estimated that the international visitor market share (of all visitors) to the Port Campbell Precinct will grow from 29% to 41%. The interpretive centre will be critical in retaining the growing market share within the region and maximising the local expenditure benefits of these visitors.

**TABLE 41** MARKET SHARE OF LONG TERM CONSUMPTION, PORT CAMPBELL PRECINCT AND LOCH ARD INTERPRETIVE CENTRE

![](chart)


12.4.2. GREAT OCEAN WALK UPGRADE AND DEVELOPMENT (INFRASTRUCTURE)

**SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)**

The Great Ocean Walk Upgrade and Development is estimated to have a total short term economic impact of $22 million on the Victorian economy, during the construction phase. The project is estimated to contribute 71 full-time jobs in the short term.

**TABLE 42** SHORT-TERM ECONOMIC IMPACT OF THE GREAT OCEAN WALK UPGRADE AND DEVELOPMENT

<table>
<thead>
<tr>
<th>Great Ocean Walk Upgrade and Development</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$10,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$11,850,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$21,850,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>28</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>43</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>71</td>
</tr>
</tbody>
</table>


**LONG TERM IMPACT**

The long term economic impact of the Great Ocean Walk cannot be easily quantified without extensive research and modelling. However further investment in the trail will lift the quality of the experience into a world renewed iconic trail. This will facilitate additional use of the trail including international visitation and encourage new private sector investment in accommodation and tours.

MARKET SHARE OF LONG TERM CONSUMPTION
The Great Ocean Walk will primarily service the needs of the Victorian visitor market. The Interstate market is estimated to remain constant at 14%. Upgrade to the Great Ocean Walk (and the complementary marketing campaigns) is estimated to facilitate a growth in the international market share, from 15% to 23%. As such, the Great Ocean Walk will play an important role in driving and capturing the growing market share of international visitors within the region and maximising the local expenditure benefits of these international visitors.

**Table 43** Market Share of Long Term Consumption, Great Ocean Walk Upgrade and Development

12.4.3. Great Ocean Road Signature Accommodation, Moonlight Head

**Short Term Economic Impact (Construction Phase)**

The construction of the Great Ocean Road Signature Accommodation at Moonlight Head is estimated to have a total short term economic impact of $44 million on the Victorian economy. The project is estimated to create 135 full-time jobs in the short term.

**Table 44** Short-Term Economic Impact of the Great Ocean Road Signature Accommodation, Moonlight Head

<table>
<thead>
<tr>
<th>Great Ocean Road Signature Accommodation, Moonlight Head</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$20,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$23,705,000</td>
</tr>
<tr>
<td><strong>Total Economic Impact</strong></td>
<td>$43,705,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>57</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>78</td>
</tr>
<tr>
<td><strong>Total Employment Impact</strong></td>
<td>135</td>
</tr>
</tbody>
</table>


**Long Term Impact (Operational Phase)**

In the long-term, the project is estimated to have a total economic impact of $59 million per year and create 158 full-time jobs per annum in the course of its operations.

The facility will have additional long term benefits for the region in marketing value; there are a number of examples where signature accommodation has created additional awareness and motivation for people to visit a region. The Southern Ocean Lodge on
Kangaroo Island provides an example of signature accommodation which has created new awareness of a destination which initially had low levels of exposure to markets. It is difficult to quantify the impact of additional exposure of the Great Ocean Road to new markets with Signature Accommodation, however anecdotally the impact will be significant particularly for higher yielding niche markets.

**TABLE 45** ANNUAL LONG-TERM ECONOMIC IMPACT OF THE GREAT OCEAN ROAD SIGNATURE ACCOMMODATION, MOONLIGHT HEAD

<table>
<thead>
<tr>
<th>Great Ocean Road Signature Accommodation, Moonlight Head</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$31,387,065</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$27,243,972</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$58,631,038</td>
</tr>
<tr>
<td>Estimated Number of People Employed Directly</td>
<td>30</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>128</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>158</td>
</tr>
</tbody>
</table>


MARKET SHARE OF LONG TERM CONSUMPTION

As Table 46 shows, the Great Ocean Road Signature Accommodation will create new opportunities for growth in the international market as shown in the figure below, where by the international share of consumption will increase from 26% to 37% over a 15 year operational period. The domestic market will consequently decrease by comparison over that period.

**TABLE 46** MARKET SHARE OF LONG TERM CONSUMPTION, GREAT OCEAN ROAD SIGNATURE ACCOMMODATION

<table>
<thead>
<tr>
<th>Year</th>
<th>International</th>
<th>Victoria</th>
<th>Interstate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>26%</td>
<td>55%</td>
<td>19%</td>
</tr>
<tr>
<td>2034</td>
<td>37%</td>
<td>46%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: Data on Visitors to the Western and Geelong Regions staying in Hotels/Motels supplemented by Data on Visitors to Northern Territory staying in Luxury Hotel Accommodation (Tourism Research Australia, 2010), prepared by Urban Enterprise 2011.
12.4.4. LAKE CONDAH / BUDJ BIM NATIONAL HERITAGE LANDSCAPE CENTRE

SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)

The construction of the Lake Condah / Budj Bim National Heritage Landscape Centre is estimated to have a total short term economic impact of $100 million on the Victorian economy. The project is estimated to contribute over 181 full-time jobs in the short term.

**TABLE 47 SHORT-TERM ECONOMIC IMPACT OF THE LAND CONDAH / BUDJ BIM NATIONAL HERITAGE LANDSCAPE CENTRE**

<table>
<thead>
<tr>
<th>Lake Condah / Budj Bim National Heritage Landscape Centre</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$50,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$49,600,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$99,600,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>137</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>44</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>181</td>
</tr>
</tbody>
</table>


ANNUAL LONG TERM ECONOMIC IMPACT (OPERATIONAL IMPACT)

In the long-term, the project is estimated to have a total economic impact of $8 million on the Victorian economy per year. The project is estimated to create 40 full-time jobs per annum in the course of its operations.

**TABLE 48 LONG-TERM ECONOMIC IMPACT OF THE LAND CONDAH / BUDJ BIM NATIONAL HERITAGE LANDSCAPE CENTRE**

<table>
<thead>
<tr>
<th>Lake Condah / Budj Bim National Heritage Landscape Centre</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$4,360,841</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$3,724,159</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$8,085,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>25</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>15</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>40</td>
</tr>
</tbody>
</table>

MARKET SHARE OF LONG TERM CONSUMPTION

The Lake Condah heritage centre will play a critical role in attracting the indigenous experience visitor market to Victoria. Currently, there are no international renowned indigenous tourism products in the Great Ocean Road Region; The Lake Condah interpretive centre will allow for the development of a strong indigenous tourism market. With the completion of the centre by 2014, demand for the interpretive centre will be primarily driven by the local Victorian market (at 38% market share), followed by Interstate visitors market (33%).

However by 2034, the international market will be the primary consumer of the facility’s indigenous tourism products. The establishment of the centre will facilitate growth in the international market share for indigenous experience visitors from 28% in 2014 to 40% in 2034. Victorian visitors are estimated to decline in market share to 32% and interstate visitors to 28%.

TABLE 49  MARKET SHARE OF LONG TERM CONSUMPTION, LAND CONDAH / BUDJ BIM NATIONAL HERITAGE LANDSCAPE CENTRE

<table>
<thead>
<tr>
<th>Year</th>
<th>International</th>
<th>Victoria</th>
<th>Interstate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>38%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>2034</td>
<td>40%</td>
<td>32%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Data estimated by Tourism Research Australia 2009 (Data on Indigenous Visitors to Australia), prepared by Urban Enterprise 2011.

AVALON AIRPORT UPGRADE

SHORT TERM ECONOMIC IMPACT

The Avalon Airport upgrade is estimated to have a total short term economic impact of $33 million during the construction phase. The project is estimated to contribute 92 full-time jobs in the short term.

SHORT-TERM ECONOMIC IMPACT OF THE AVALON AIRPORT UPGRADE

<table>
<thead>
<tr>
<th>Avalon Airport Upgrade</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$15,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$17,775,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$32,775,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>43</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>49</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>92</td>
</tr>
</tbody>
</table>

LONG TERM ECONOMIC IMPACT

In the long-term, the project is estimated to have a total economic impact of $519 million on the Victorian economy per year. The project is estimated to contribute 1,076 full-time jobs per annum in the course of its operations.

LONG-TERM ECONOMIC IMPACT OF THE AVALON AIRPORT UPGRADE

<table>
<thead>
<tr>
<th>Avalon Airport Upgrade</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$307,734,440</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$211,413,560</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$519,148,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>420</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>656</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>1,076</td>
</tr>
</tbody>
</table>


MARKET SHARE OF LONG TERM CONSUMPTION

The Avalon Airport market share is currently dominated by local Victorian and Interstate visitor markets, as the facility only provides for domestic flights. With the establishment of the international terminal, international usage is projected to grow to 22% of the market share by 2014 and then to 33% by 2034. The airport will play a critical role in facilitating this growth, as well as the growth in international visitors to the Great Ocean Road Region.

GREAT OCEAN ROAD UPGRADE

SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)

The Great Ocean Road upgrade is estimated to have a total economic impact of $114 million on the Victorian economy, during the construction phase. The project is estimated to contribute 293 full-time jobs in the short term.

TABLE 51 SHORT-TERM ECONOMIC IMPACT OF GREAT OCEAN ROAD UPGRADE

<table>
<thead>
<tr>
<th>Great Ocean Road Upgrade</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$50,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$64,432,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$114,432,000</td>
</tr>
<tr>
<td>Estimated Number of People</td>
<td>152</td>
</tr>
<tr>
<td>Employment on the Project</td>
<td></td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>141</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>293</td>
</tr>
</tbody>
</table>

Source: Victoria Input-Output Multipliers, Urban Enterprise 2011

LONG TERM ECONOMIC IMPACT (OPERATIONAL)

Due to the nature of the project, it is difficult to estimate the operational economic impact from the Great Ocean Road Upgrade project, as the project a tourism enabler than a new piece of tourism infrastructure. The project will enable an improved driving experience of the Great Ocean Road and will enable greater cycling usage of the road through cycling lanes and shoulder sealing. The project will also secure the future of the Great Ocean Road Region and allow visitation along the route to continue.

MARKET SHARE OF LONG TERM CONSUMPTION

The impact of the upgrade to the market shares of Interstate and International visitors will be minimal due to the high volume of usage by Victorians.

TABLE 52 MARKET SHARE OF LONG TERM CONSUMPTION, GREAT OCEAN ROAD

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2034</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Victoria</td>
<td>90%</td>
<td>88%</td>
</tr>
<tr>
<td>Interstate</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: Business Visitors to Victoria who undertook Conference activities (Tourism Research Australia 2010), prepared by Urban Enterprise 2011.
12.4.5. GREAT OCEAN ROAD INTEGRATED RESORT, PORT CAMPBELL AREA

SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)

The construction of the Great Ocean Road Integrated Resort at Port Campbell is estimated to have a total short term economic impact of $76 million on the Victorian economy. The project is forecast to create 249 full-time jobs in the short term.

TABLE 53 SHORT-TERM ECONOMIC IMPACT OF THE GREAT OCEAN ROAD INTEGRATED RESORT

<table>
<thead>
<tr>
<th>Great Ocean Road Integrated Resort</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$35,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$41,475,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$76,475,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the project</td>
<td>99</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>150</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>249</td>
</tr>
</tbody>
</table>


LONG TERM IMPACT (OPERATIONAL PHASE)

In the long-term, the project is estimated to have a total economic impact of $19 million per annum and create 195 full-time jobs per annum in the course of its operations.

ANNUAL LONG-TERM ECONOMIC IMPACT OF THE GREAT OCEAN ROAD INTEGRATED RESORT

<table>
<thead>
<tr>
<th>Great Ocean Road Integrated Resort</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$10,334,047</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$8,969,953</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$19,304,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed Directly</td>
<td>80</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>115</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>195</td>
</tr>
</tbody>
</table>

MARKET SHARE OF LONG TERM CONSUMPTION

As Table 54 shows, the Great Ocean Road integrated resort will primarily service the Victorian market which will account for 63% of market share initially and then drop to 58% by 2034. The share of international visitors is projected to grow from 14% to 22% while the interstate market is likely to see a small decline in share.

TABLE 54 MARKET SHARE OF LONG TERM CONSUMPTION, GREAT OCEAN ROAD INTEGRATED RESORT

12.4.6. GEELONG CONVENTION AND EXHIBITION CENTRE INCLUDING EASTERN BEACH SPA COMPLEX

SHORT TERM ECONOMIC IMPACT (CONSTRUCTION PHASE)

The Geelong Convention and Exhibition Centre is estimated to have a total short term economic impact of $437 million on the Victorian economy during the construction phase. The project is estimated to create 1,136 full-time jobs in the short term.

TABLE 55 SHORT-TERM ECONOMIC IMPACT OF THE GEELONG EXHIBITION AND EVENTS CENTRE INCLUDING EASTERN BEACH SPA COMPLEX

<table>
<thead>
<tr>
<th>Geelong Exhibition and Events Centre including Eastern Beach Spa Complex</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$200,000,000</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$237,000,000</td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$437,000,000</td>
</tr>
<tr>
<td>Estimated Number of People Employed on the Project</td>
<td>537</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>599</td>
</tr>
<tr>
<td>Total Employment Impact</td>
<td>1,136</td>
</tr>
</tbody>
</table>


LONG TERM ECONOMIC IMPACT (OPERATIONAL PHASE)

In the long-term, the project is estimated to have a total economic impact of $49 million per year and create 262 full-time jobs per annum in the course of its operations. This does not include the additional benefits of the facility in creating awareness of the region and does not account for pre and post trip tours through the Great Ocean Road Region.
The economic impact therefore is likely to be significantly higher than identified below, however it is difficult for modelling to determine the quantity of the regional impact from the additional tourism benefits of the facility without specific detailed research.

**TABLE 56 ANNUAL LONG-TERM ECONOMIC IMPACT OF THE GEELONG CONVENTION AND EXHIBITION CENTRE INCLUDING EASTERN BEACH SPA COMPLEX**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Economic Impact</td>
<td>$24,995,939</td>
</tr>
<tr>
<td>Indirect Economic Impact</td>
<td>$24,246,061</td>
</tr>
<tr>
<td><strong>Total Economic Impact</strong></td>
<td><strong>$49,242,000</strong></td>
</tr>
<tr>
<td>Estimated Number of People Employed Directly</td>
<td>164</td>
</tr>
<tr>
<td>Indirect Employment</td>
<td>98</td>
</tr>
<tr>
<td><strong>Total Employment Impact</strong></td>
<td><strong>262</strong></td>
</tr>
</tbody>
</table>


**MARKET SHARE OF LONG TERM CONSUMPTION**

As Table 57 shows, the Geelong Convention and Exhibition Centre will primarily service the Victorian market which will account for 75% of market share initially and then decreasing to 68% by 2034. The share of international visitors is projected to grow to 24% by 2034 while interstate visitation remains static.

**TABLE 57 MARKET SHARE OF LONG TERM CONSUMPTION, GEELONG CONVENTION AND EXHIBITION CENTRE INCLUDING EASTERN BEACH SPA COMPLEX**

APPENDICES
## APPENDIX A DOCUMENTS REVIEWED

<table>
<thead>
<tr>
<th>Document Requirements</th>
<th>Federal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>National Long-Term Tourism Strategy</td>
</tr>
<tr>
<td></td>
<td>National Long-Term Tourism Strategy Work Plan</td>
</tr>
<tr>
<td></td>
<td>The Jackson Report on behalf of the Steering Committee: Informing the National Long Term Tourism Strategy</td>
</tr>
<tr>
<td></td>
<td>Tourism Research Australia, International Visitors in Australia, September 2010</td>
</tr>
<tr>
<td></td>
<td>Tourism Research Australia, Regional Tourism Estimates</td>
</tr>
<tr>
<td></td>
<td>Tourism Forecasting Committee Forecasts, 2010 issue 2</td>
</tr>
<tr>
<td></td>
<td>Tourism Australia, 2020 Tourism Industry Potential, November 2010</td>
</tr>
<tr>
<td></td>
<td>Tourism Research Australia, Travel by Australians, September 2010</td>
</tr>
<tr>
<td></td>
<td>State</td>
</tr>
<tr>
<td></td>
<td>Tourism Victoria Nature Based Tourism Strategy</td>
</tr>
<tr>
<td></td>
<td>Tourism Victoria Food and Wine Strategy</td>
</tr>
<tr>
<td></td>
<td>Concept Proposals for Tourism Development in Victoria</td>
</tr>
<tr>
<td></td>
<td>Tourism Investment Guidelines, Tourism Victoria</td>
</tr>
<tr>
<td></td>
<td>Victoria’s Geothermal and Natural Mineral Water Tourism Investment Opportunities</td>
</tr>
<tr>
<td></td>
<td>Victoria’s 10 Year Tourism and Events Industry Strategy</td>
</tr>
<tr>
<td></td>
<td>Tourism Victoria’s Regional Tourism Action Plan 2009-2012</td>
</tr>
<tr>
<td></td>
<td>The Victorian Trails Strategy 2005-2010</td>
</tr>
<tr>
<td></td>
<td>Regional</td>
</tr>
<tr>
<td></td>
<td>Great Ocean Road Region Strategy</td>
</tr>
<tr>
<td></td>
<td>G21 Geelong Region Plan</td>
</tr>
<tr>
<td></td>
<td>Great South Coast Regional Strategic Plan</td>
</tr>
<tr>
<td></td>
<td>Local</td>
</tr>
<tr>
<td></td>
<td>Surfworld Museum and Torquay VIC Opportunities Study</td>
</tr>
<tr>
<td></td>
<td>Surf Coast Walk Feasibility Study</td>
</tr>
<tr>
<td></td>
<td>Mountain Biking Trails in the Anglesea Heath Lands</td>
</tr>
</tbody>
</table>
APPENDIX B  CONSULTATION PROGRAM

CONSULTATION UNDERTAKEN

LOCAL GOVERNMENT AND LOCAL TOURISM ASSOCIATIONS

Workshops with Local Government Representatives and Local Tourism Association Representatives have been undertaken with around 10-16 representatives at each workshop.

Warrnambool [17th May 2011];

Colac [18th May 2011];

Geelong [18th May 2011].

Topics of discussion:

Product strengths (including icons and potential icons);

Existing and emerging tourism nodes;

Experiences offered to visitors;

Product and infrastructure gaps and opportunities;

Gaps in visitor experience (what the visitor would like but cannot get locally);

Constraints to tourism development (Planning hurdles, infrastructure issues);

Local Government Priorities.

STATE GOVERNMENT STAKEHOLDERS WORKSHOP

A workshop was undertaken with State Government Stakeholders including Parks Victoria and Tourism Victoria which was used to discuss potential priority projects. The workshop was conducted on the 16th June 2011 in Melbourne.

Tourism Industry Workshops

Workshops were conducted with the tourism industry in the Great Ocean Road Region. Industry representatives included existing businesses and investors in tourism. The following workshops were undertaken with 8-10 representatives from each:

Warrnambool [28th June 2011];

Geelong [29th June 2011].

OTHER CONSULTATION

Phone consultation has occurred during the course of the project to confirm and discuss opportunities within the region; this has included discussions with investors, tourism operators, State Government Representatives and visitors information centres and local tourism Managers.
NEW ZEALAND

When visiting the Great Ocean Road Region New Zealand experience seekers have a higher preference for the following activities:

Eating out;
Sightseeing;
Shopping, and
Going to the beach.

NEW ZEALAND EXPERIENCE SEEKERS TOP 15 ACTIVITIES 2010

<table>
<thead>
<tr>
<th>New Zealand - Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>84%</td>
<td>93%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>55%</td>
<td>90%</td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td>68%</td>
<td>76%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>44%</td>
<td>70%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>33%</td>
<td>64%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>48%</td>
<td>60%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>19%</td>
<td>55%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>18%</td>
<td>52%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>16%</td>
<td>51%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>13%</td>
<td>43%</td>
</tr>
<tr>
<td>Tourist trains</td>
<td>6%</td>
<td>33%</td>
</tr>
<tr>
<td>Attend theatre, concerts or other performing arts</td>
<td>11%</td>
<td>31%</td>
</tr>
<tr>
<td>Charter boat / cruise / ferry</td>
<td>14%</td>
<td>28%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>14%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
JAPAN

When visiting the Great Ocean Road Region Japanese experience seekers have a higher preference for the following activities:

Shopping;

Sightseeing;

Shopping, and

Going to the beach.

Interestingly, Japanese experience seekers, when visiting the Great Ocean Road participate less in dining and eating out than the average for Australia. This may demonstrate the lower supply of dining product suited to Japanese experience seeker dining preferences when compared to other regions they visit in Australia.

JAPAN EXPERIENCE SEEKERS TOP 15 ACTIVITIES 2010

<table>
<thead>
<tr>
<th>Japan- Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go shopping for pleasure</td>
<td>77%</td>
<td>83%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>72%</td>
<td>81%</td>
</tr>
<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>88%</td>
<td>73%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>61%</td>
<td>62%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>31%</td>
<td>57%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Go on guided tours or excursions</td>
<td>27%</td>
<td>37%</td>
</tr>
<tr>
<td>Tourist trains</td>
<td>16%</td>
<td>35%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>19%</td>
<td>34%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>Visit wineries</td>
<td>8%</td>
<td>25%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>16%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
When visiting the Great Ocean Road Region Chinese experience seekers have a higher preference for the following activities:

- Going to the beach;
- Sightseeing;
- Going to the beach; and
- Eating out, dining.

### CHINA EXPERIENCE SEEKERS TOP 15 ACTIVITIES 2010

<table>
<thead>
<tr>
<th>China - Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to the beach</td>
<td>75%</td>
<td>92%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>71%</td>
<td>87%</td>
</tr>
<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>81%</td>
<td>82%</td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>37%</td>
<td>67%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>46%</td>
<td>65%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>42%</td>
<td>62%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>42%</td>
<td>62%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>39%</td>
<td>59%</td>
</tr>
<tr>
<td>Visit casinos</td>
<td>33%</td>
<td>57%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>37%</td>
<td>53%</td>
</tr>
<tr>
<td>Charter boat / cruise / ferry</td>
<td>31%</td>
<td>52%</td>
</tr>
<tr>
<td>Visit amusements / theme parks</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Tourist trains</td>
<td>12%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
USA

When visiting the Great Ocean Road Region USA experience seekers have a higher preference for the following activities:

- Sightseeing;
- Eating out, dining;
- Going shopping;
- Going to the beach.

### USA Experience Seekers Top 15 Activities 2010

<table>
<thead>
<tr>
<th>USA - Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing/looking around</td>
<td>73%</td>
<td>94%</td>
</tr>
<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>86%</td>
<td>92%</td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td>63%</td>
<td>85%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>59%</td>
<td>83%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>45%</td>
<td>82%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>47%</td>
<td>73%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>37%</td>
<td>68%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>54%</td>
<td>67%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>37%</td>
<td>66%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>40%</td>
<td>62%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>29%</td>
<td>56%</td>
</tr>
<tr>
<td>Go on guided tours or excursions</td>
<td>24%</td>
<td>53%</td>
</tr>
<tr>
<td>Charter boat / cruise / ferry</td>
<td>35%</td>
<td>49%</td>
</tr>
<tr>
<td>Visit wineries</td>
<td>15%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
UK

When visiting the Great Ocean Road Region UK experience seekers have a higher preference for the following activities:

- Eating out, dining;
- Sightseeing;
- Going to the beach;
- Visiting National/State Parks;
- Going Shopping;
- Going to pubs/clubs.

### UK EXPERIENCE SEEKERS TOP 15 ACTIVITIES 2010

<table>
<thead>
<tr>
<th>UK - Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>92%</td>
<td>97%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>83%</td>
<td>95%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>77%</td>
<td>92%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>57%</td>
<td>84%</td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td>74%</td>
<td>81%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>66%</td>
<td>78%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>52%</td>
<td>73%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>51%</td>
<td>69%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>41%</td>
<td>65%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>43%</td>
<td>64%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>43%</td>
<td>63%</td>
</tr>
<tr>
<td>Charter boat / cruise / ferry</td>
<td>45%</td>
<td>61%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>35%</td>
<td>58%</td>
</tr>
<tr>
<td>Go on guided tours or excursions</td>
<td>27%</td>
<td>50%</td>
</tr>
<tr>
<td>Snorkelling</td>
<td>19%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Source: IVS, CD-MOTA
GERMANY

When visiting the Great Ocean Road Region German experience seekers have a higher preference for the following activities:

Sightseeing;

Going to the beach;

Dining out;

Visiting National/ State Parks;

Going shopping;

Going to pubs/clubs.

GERMANY EXPERIENCE SEEKERS TOP 15 ACTIVITIES 2010

<table>
<thead>
<tr>
<th>Germany - Top 15 Activities</th>
<th>AUST</th>
<th>GOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing/looking around</td>
<td>84%</td>
<td>98%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>76%</td>
<td>91%</td>
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<tr>
<td>Eat out / dine at a restaurant and/or café</td>
<td>87%</td>
<td>91%</td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td>65%</td>
<td>85%</td>
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<tr>
<td>Go shopping for pleasure</td>
<td>76%</td>
<td>84%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td>58%</td>
<td>82%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>54%</td>
<td>77%</td>
</tr>
<tr>
<td>Bushwalking / rainforest walks</td>
<td>53%</td>
<td>75%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>57%</td>
<td>74%</td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td>50%</td>
<td>67%</td>
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<tr>
<td>Charter boat / cruise / ferry</td>
<td>50%</td>
<td>62%</td>
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<tr>
<td>Go on guided tours or excursions</td>
<td>45%</td>
<td>60%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>45%</td>
<td>58%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>46%</td>
<td>56%</td>
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<tr>
<td>Tourist trains</td>
<td>23%</td>
<td>49%</td>
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Source: IVS, CD-MOTA
APPENDIX D  PRODUCT AND INFRASTRUCTURE AUDIT
### Scenario 1 Forecast

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<th>Total</th>
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<td></td>
<td>Domestic</td>
<td>I/N</td>
<td></td>
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<td>7,275,921</td>
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<tr>
<td>2011</td>
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<td>226,839,736</td>
<td>6,866,506</td>
<td>505,911</td>
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<td>546,141</td>
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<td>8,095,672</td>
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<td>249,891,061</td>
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<td>283,708,715</td>
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<td>933,088</td>
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### SCENARIO 2 FORECAST

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<td>I/N</td>
<td>Total</td>
<td>Domestic</td>
<td>I/N</td>
</tr>
<tr>
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<td>224,130,894</td>
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</tbody>
</table>
| Year | Value | Quantity | Total | Profit | Investment | Growth
|------|-------|----------|-------|--------|------------|--------
| 2024 | 256,359,058 | 10,076,236 | 279,442,656 | 7,958,396 | 901,751 | 8,860,147 |
| 2025 | 259,285,750 | 10,529,667 | 286,486,899 | 8,049,252 | 942,330 | 8,991,582 |
| 2026 | 262,245,854 | 11,003,502 | 293,708,715 | 8,141,145 | 984,734 | 9,125,880 |
| 2027 | 265,239,751 | 11,498,659 | 301,738,410 | 8,234,088 | 1,029,048 | 9,263,135 |
| 2028 | 268,267,828 | 12,016,099 | 308,703,927 | 8,328,091 | 1,075,355 | 9,403,446 |
| 2029 | 271,330,475 | 12,556,823 | 316,484,928 | 8,423,168 | 1,123,746 | 9,546,914 |
| 2030 | 274,428,086 | 13,121,880 | 324,462,940 | 8,519,330 | 1,174,314 | 9,693,644 |

**Projected Annual Growth Rate:** 1.1% 4.5% 2.5%
### Scenario 3 Forecast

<table>
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<tr>
<th>Year</th>
<th>Australia Domestic</th>
<th>I/N</th>
<th>Total</th>
<th>Domestic</th>
<th>I/N</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>218,690,000</td>
<td>5,440,894</td>
<td>224,130,894</td>
<td>6,785,000</td>
<td>486,921</td>
<td>7,275,921</td>
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### Forecasts for International Experience Seekers Segments Using Forecasting Committee Growth Estimates for International Markets

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<th>India</th>
<th>UK</th>
<th>Germany</th>
<th>USA</th>
<th>China</th>
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<td>36,162</td>
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<td>17,185</td>
<td>27,254</td>
<td>57,156</td>
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<td>36,261</td>
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<td>2026</td>
<td>111,104</td>
<td>17,563</td>
<td>29,680</td>
<td>58,242</td>
<td>37,993</td>
<td>37,385</td>
<td>61,096</td>
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<tr>
<td>2027</td>
<td>115,659</td>
<td>17,949</td>
<td>32,321</td>
<td>59,348</td>
<td>38,943</td>
<td>38,544</td>
<td>66,289</td>
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<td>2028</td>
<td>120,401</td>
<td>18,344</td>
<td>35,198</td>
<td>60,476</td>
<td>39,916</td>
<td>39,739</td>
<td>71,924</td>
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<tr>
<td>2029</td>
<td>125,337</td>
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<td>40,970</td>
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<td>2030</td>
<td>130,476</td>
<td>19,160</td>
<td>41,742</td>
<td>62,796</td>
<td>41,937</td>
<td>42,240</td>
<td>84,671</td>
</tr>
</tbody>
</table>
## Forecasts for Domestic Visitor Segments Based on Population and Age Projections

<table>
<thead>
<tr>
<th>Key Domestic Market</th>
<th>Visible Achievement</th>
<th>Traditional Family Life</th>
<th>Young Optimism</th>
<th>Socially Aware</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AUST</td>
<td>GOR</td>
<td>AUST</td>
<td>GOR</td>
</tr>
<tr>
<td>2010</td>
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<td>2018</td>
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<td>2019</td>
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<td>1,329,524</td>
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<tr>
<td>2020</td>
<td>3,249,636</td>
<td>1,940,744</td>
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<td>1,359,717</td>
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<tr>
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<td>1,963,034</td>
<td>4,727,642</td>
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<td>3,305,782</td>
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<td>4,835,004</td>
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<td>2024</td>
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<tr>
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<td>3,440,593</td>
<td>2,054,787</td>
<td>5,657,998</td>
<td>1,702,046</td>
</tr>
</tbody>
</table>
GAME CHANGER [RANKED OUT OF 40]

Project will significantly change tourism in the region by enabling new investment.

It has been agreed by the steering committee members that the most important projects in the Great Ocean Road Region are those which will significantly change tourism in the region by enabling new investment.

Projects which are true game changes are those which significantly grow the appeal of the region to both investors in tourism and to visitors. Projects which create a high level of flow on benefits in terms of attracting additional investment will be ranked 31-40.

Projects which provide a moderate impact on investment will be ranked 21-30.

Projects which provide some impact on investment will be ranked 11-20.

Projects which have little or no impact on creating additional investment will be ranked 0-10.

MATCHES/ENABLES TO DEMAND BY EXPERIENCE SEEKER SEGMENTS [RANKED OUT OF 30]

Preferences for key target international and interstate experience seeker markets have been met.

The project brief highlights the importance of any projects identified to meet demand by key segments. In line with the Australian Landscapes Program is the aim to encourage a greater proportion of experience seekers visitors to Australia and to disperse these visitors throughout the country to visit a range of different landscapes that provide memorable experiences. Tourism Australia has identified a number of international and domestic segments which have a higher preference for unique and compelling experiences. Experience Seeker Market Segments have been analysed in this report to identify their preferences and level of demand for specific experiences. Primary preferred experience preferences by these target markets include:

Food and wine experience. Overwhelmingly the number one preference for experience seekers. Food and wine experience is identified as a preferred activity by all key origin markets.

Nature based experience. This is the second most common preference for experience seekers from all origin markets. The Japanese experience seeker market is the only one where nature based experience is not identified as a key preference.

Shopping experience. All key experience seeker markets except the United States and New Zealand expressed a preference for a shopping related experience during their visit.

Some secondary preferred experiences are shared amongst western experience seeker markets, these include:

Festivals and events. German, United Kingdom and the United States experience seekers had a preference for attending festivals and events.

Walking experience. German and United States experience seekers had a preference for a walking experience. Other experience seekers markets had no preference for a walking experience.

Projects which match well with most experience seeker markets are ranked highly 21-30.

Projects which match well with of the preferred experiences are ranked 11-20.

Projects which do not match well with experience seeker preferences are ranked less than 10.
<table>
<thead>
<tr>
<th>Target Markets</th>
<th>Continental Europe</th>
<th>United Kingdom</th>
<th>Germany</th>
<th>USA</th>
<th>China</th>
<th>New Zealand</th>
<th>India</th>
<th>Visible Achieve...</th>
<th>Socially Aware</th>
<th>Traditional Family Life</th>
<th>Young Optimism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Size (2010)</td>
<td>58,414</td>
<td>43,097</td>
<td>25,593</td>
<td>22,938</td>
<td>16,563</td>
<td>12,399</td>
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<td>Market Size (2020)</td>
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<td>31,127</td>
<td>37,449</td>
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<td>1,940,744</td>
<td>1,820,472</td>
<td>1,359,717</td>
<td>423,311</td>
</tr>
</tbody>
</table>

### Key Experience Preferences

<table>
<thead>
<tr>
<th>Experience Preference</th>
<th>International Experience Seekers</th>
<th>Roy Morgan Values Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and Wine</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Nature Based Tourism/ Outdoor Adventure</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Heritage/ History</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Aboriginal culture</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Shopping</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Wildlife</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Events</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

### Accommodation

- **Luxury Hotels**
  - Mid-Range Hotels
  - Self-Contained
- **Mid-Range Hotels**
  - Self-Contained
- **Self-Contained Guest House/ B&B**
- **Back-packers**
  - Caravan Park
- **Luxury Hotels**
  - Mid-Range Hotels
  - Self-Contained
- **Mid-Range Hotels**
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Self-Contained**
  - Caravan Park
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
- **Luxury Hotel**
  - Mid-Range Hotels
  - Self-Contained
CREATES/ ENABLES AN ICONIC EXPERIENCE. [RANKED OUT OF 30]

Projects which provide or facilitate an iconic experience in the Great Ocean Road Region which becomes a motivator for travel.

Projects which support an existing iconic experience are ranked highly as they add value to the motivating reasons for travel. This report highlights iconic experiences which include:

- Drive the Great Ocean Road;
- View the 12 Apostles;
- Follow the Great Ocean Walk;
- Visit Bells Beach and experience the surf culture at surf breaks, shops and coastal towns;
- Discover maritime history;
- View Australian wildlife.

Projects which enable or add value to the above existing iconic experiences or which create a new iconic experience are ranked 21-30

Projects which add value to other experiences which are not considered iconic to the region (e.g.: food and wine are ranked 11-20

Projects which do not enable or add value to existing iconic experiences are provided with a ranking less than 10.

ENCOURAGES YIELD, LENGTH OF STAY OF VISITORS [RANKED OUT OF 30]

Projects which encourage greater visitor yield as opposed higher levels of lower yielding visitors.

A critical driver for this study is to deliver projects which will add benefit to the economic impact of tourism in the region, whilst respecting environmental values. One way to achieve this is to increase length of stay of visitors without promoting mass tourism.

Projects which add significantly to visitor yield and length of stay and yield will be ranked above 21-30.

Projects which add positively to visitation and yield will be ranked 11-20.

Projects which are unlikely to add directly to visitor yield will be ranked below 10.

CREATES/ ENABLES ADDITIONAL CAPACITY [RANKED OUT OF 30]

Projects which create more capacity within the region to accommodate projected growth.

Projected growth shows that additional capacity of infrastructure and product will be required in the region to accommodate demand.

This includes upgrades to existing facilities and provision of new facilities.

Infrastructure and product development projects which create additional capacity in the region will be ranked 15-30.

Projects which do not provide significant increases in capacity will be ranked below 14.

FACILITATES/ ENABLES NEW NICHE HIGHER YIELDING VISITOR MARKETS. [RANKED OUT OF 30]

Projects which provide a new experience which encourages new higher yield markets to visit which may not currently being accommodated in the region.

There is potential for new infrastructure and product to accommodate new visitors markets. This includes infrastructure projects such as airports and cruise ship facilities.
Projects which have the potential to attract and facilitate new markets will be ranked above 15.

Projects which have limited potential to facilitate new markets or facilitate existing markets will be ranked below 14.

**ENCOURAGES/ ENABLES SEASONAL DISPERSAL OF VISITORS. [RANKED OUT OF 20]**

*Projects which encourage visitation during the off peak and shoulder periods.*

In addition to geographic dispersal, projects which provide seasonal dispersal will also be ranked favourably. Seasonal dispersal of visitors has a number of benefits, including:

- Providing improved financial sustainability for business;
- Lowering environmental impacts;
- Strengthening the capacity of the region.

Projects which provide product or infrastructure which is not seasonally dependent or encourages visitation in the off peak will be ranked highly 11-20.

Projects which continue to add to peak visitation periods will be ranked under 10.

**ENCOURAGES/ ENABLES GEOGRAPHIC DISPERSAL OF VISITORS.**

*Projects which encourage dispersal of visitors to geographic locations which do not attract high levels of peak visitation.*

Encouraging dispersal of visitors throughout the region has a number of benefits:

- Reduces impact on areas of high visitation;
- Provides economic benefit to areas which traditionally have a low tourism base;
- Add to length of stay;
- Add to the visitor experience;
- Creates new experiences and promotes new product.
- Builds the capacity of the region.

The following areas are those which provide the greatest level of geographic dispersal for visitor groups:

- Glenelg
- Golden Plains
- Moyne
- Corangamite

These areas which have lower levels of tourism development and also more isolated form large population centres provide the greatest level of visitor dispersal. These areas will be ranked 14-20.

The following areas provide some dispersal:

- Warrnambool;
- Colac Otway.

Projects within these areas will be ranked 8-13.

Other areas which have high levels of visitation will be ranked lower than 7 for promoting visitor dispersal.
There may be exception to the rules above, such as projects which are provided within the hinterland of Geelong and Surf Coast, which draw visitors away from the popular coastal locations and hence disperse visitors into the hinterland.

**MATCHES/ ENABLES DEMAND FROM MELBOURNE SHORT BREAK MARKET**

These are locations of product and product typologies that meet the high yield Melbourne short break market.

The Melbourne short break market is a key driver for tourist visitation within 2 hours from Melbourne. This market is generally high yielding and includes the socially aware and visible achievement domestic values segments.

Primary product which matches well to this market includes product those which provides:

- Food and wine experiences;
- Nature based tourism experience.

In the case of the Great Ocean Road Region, destinations within two hours' drive from Melbourne are considered within the Melbourne short break market. However with improved infrastructure such as the bypass around Winchelsea more destinations will be within this travel timeframe in the near future.

Destinations within the following Local Government Areas are considered primary areas for the Melbourne Short break market:

- Greater Geelong;
- Queenscliff;
- Golden Plains;
- Surf Coast.

Destinations which are within the above municipalities will be ranked 7-10 for the Melbourne short break market depending the project typology and proximity.

Destinations within Colac -Owttay, Corangamite, Moyne and Warrnambool are ranked between 4-6 for the Melbourne short break market depending on the travel times and accessibility.

Destinations within Glenelg are generally beyond the proximity of the Melbourne short break market and will be ranked below 3 accordingly.
APPENDIX G  REMPLAN OUTPUTS

REPLAN Economic Impact Statement

Date:  7th September 2011

Disclaimer: All figures and data presented in this document are based on data sourced from the Australia Bureau of Statistics (ABS), other local, state and federal government agencies and Urban Enterprise. Using ABS datasets, the regional economic modelling software REMPLAN, developed by Compelling Economics Pty Ltd has been applied to generate industrial economic data estimates. This document is provided in good faith with every effort made to provide accurate data and apply comprehensive knowledge. However, Compelling Economics does not guarantee the accuracy of data nor the conclusions drawn from this information. A decision to pursue any suggestions mentioned in the report is wholly the responsibility of the party concerned. Compelling Economics advises any party to conduct detailed feasibility studies and seek professional advice before proceeding with any action and accept no responsibility for the consequences of pursuing any of the findings or actions discussed in the document.

All economic modelling has been undertaken using REMPLAN™ software that has been authored by Principal Research Fellow (ret.), Ian Pinge, at La Trobe University.

A REMPLAN model of the Great Ocean Road economy has been applied to generate the impact analysis presented in this document.

The Great Ocean Road is defined by the combined local government area boundaries of Surf Coast (S), Greater Geelong (C), Colac-Otway (S), Queenscliffe (B), Corangamite (S), Warrnambool (C), Moyne (S), Glenelg (S) and Golden Plains (S).

PORT CAMPBELL PRECINCT AND LOCHRARD INTERPRETIVE CENTRE

CONSTRUCTION PHASE ANALYSIS

$100 million over three years. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region.
If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $82.549 million (0.49%) to $17,096.523 million. Contributing to this is a direct increase in output of $100.000 million, 6 additional jobs year 1, 107 jobs year 2, increasing to 170 additional jobs in year 3, $13.790 million more in wages and salaries and a boost in value-added of $30.636 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $83.706 million, 6 additional jobs year 1, 107 jobs year 2, increasing to 170 additional jobs in year 3, $19.500 million more paid in wages and salaries, and a gain of $33.843 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.00</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $34.816 million, employment by 2 jobs year 1, 56 jobs year 2, 87 jobs year 3, wages and salaries by $8.039 million, and value-added by $18.070 million.

Under this scenario, total output is expected to rise by $218.523 million. Corresponding to this are anticipated increases in employment of 14 jobs year 1, 270 jobs year 2, 426 jobs year 3, $41.330 million wages and salaries, and $82.549 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.509</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.19 once all flow-on industrial and consumption effects are taken into consideration.
OPERATIONAL PHASE ANALYSIS

Industry Sector: DIVISION R: - Arts & Recreation Services

The Arts and Recreation Services Division includes units mainly engaged in the preservation and exhibition of objects and sites of historical, cultural or educational interest; the production of original artistic works and/or participation in live performances, events, or exhibits intended for public viewing; and the operation of facilities or the provision of services that enable patrons to participate in sporting or recreational activities, or to pursue amusement interests.

This division excludes units that are involved in the production, or production and distribution of motion pictures, videos, television programs or television and video commercials. These units are included in the Information Media and Telecommunications Division, Source: Australian Bureau of Statistics

Under this scenario Gross Region Product\(^{11}\) is estimated to increase by $8.447 million (0.05 %) to $17,022.421 million. Contributing to this is a direct increase in output\(^{12}\) of $9.855 million, 60 additional jobs in the arts & recreational services sector, $2.393 million more in wages and salaries and a boost in value-added\(^{13}\) of $3.906 million.

\(^{11}\)GRP is the net measure of wealth generated by the region. GRP can be measured by using the incomes approach, where all incomes earned by individuals (wages and salaries), firms (gross operating surplus) and governments (taxes on products or services) are added. Alternatively an expenditure approach can be taken where all forms of final expenditure, including consumption by households, consumption by governments, additions or increases to assets (minus disposals) and exports (minus imports), are added. The expenditure approach does not include intermediate expenditure, as this would lead to double counting, eg. the wheat and flour in a loaf of bread.

\(^{12}\)Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

\(^{13}\)Value-Added data represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-Added by industry sector is the major element in the calculation of Gross Regional Product.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $5.728 million, 22 more jobs, $1.482 million more paid in wages and salaries, and a gain of $2.438 million in terms of value-added.

These industrial effects represent the following Type 1\(^{14}\) economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
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</thead>
<tbody>
<tr>
<td>Output</td>
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<tr>
<td>Employment</td>
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</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.619</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.624</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $4.052 million, employment by 17 jobs, wages and salaries by $0.936 million, and value-added by $2.103 million.

\(^{14}\)Includes the Direct Effect + Industrial Effects. If you have a Type 1 output multiplier of 1.57 then for every direct one dollar increase in output you would expect to see an extra $0.57 of activity generated within the region due to the industrial effects.
Under this scenario, total output is expected to rise by $19.635 million. Corresponding to this are anticipated increases in total employment of 99 jobs, $4.810 million wages and salaries, and $8.447 million in terms of value-added.

The total estimated changes to economic activity are summarised by the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.992</td>
</tr>
<tr>
<td>Employment</td>
<td>1.650</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.010</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.162</td>
</tr>
</tbody>
</table>

The output multiplier of 1.992 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $0.99 once all flow-on industrial and consumption effects are taken into consideration.

**AVALON AIRPORT UPGRADE**

**CONSTRUCTION PHASE ANALYSIS**

$15 million over two years. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $12.382 million (0.07%) to $17,026.357 million. Contributing to this is a direct increase in construction sector output of $15.000 million, 6 additional jobs in year 1 increasing to 37 direct jobs in year 2, $2.069 million more in wages and salaries and a boost in value-added of $4.595 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $12.556 million, up to 37 more jobs, $2.925 million more paid in wages and salaries, and a gain of $5.076 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.000</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on

---

55 includes the Direct Effect + Industrial Effects + Consumption Effects. If you have a Type 2 output multiplier of 2.31 then for every direct one dollar increase in output you would expect to see an extra $1.31 of activity generated within the region due to the industrial effects plus the consumption effects.
consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $5.222 million, employment by up to 18 jobs in year 2, wages and salaries by $1.206 million, and value-added by $2.711 million.

Under this scenario, total output is expected to rise by $32.778 million. Corresponding to this are anticipated increases in employment of 92 jobs in year 2, $6.199 million wages and salaries, and $12.382 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.548</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.19 once all flow-on industrial and consumption effects are taken into consideration.

All construction phase economic benefits are short-term and limited to the period of construction.

**OPERATIONAL PHASE ANALYSIS**

Total persons employed at full capacity: 420 people (source Lin Fox)

Industry Sectors: Air transport, aircraft repair & maintenance, retail trade, food & beverage services, rental & hiring services, administrative & support services, public administration regulatory services order & safety,

Under this scenario Gross Region Product is estimated to increase by $166.629 million (0.98%) to $17,180.604 million. Contributing to this is a direct increase in output of $307.807 million, 420 additional jobs, $42.144 million more in wages and salaries and a boost in value-added of $79.536 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $138.203 million, 350 more jobs, $27.788 million more paid in wages and salaries, and a gain of $49.134 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.449</td>
</tr>
<tr>
<td>Employment</td>
<td>1.833</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.659</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.618</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy.
The consumption effects under the scenario are expected to further boost output by $73.138 million, employment by 306 jobs, wages and salaries by $16.888 million, and value-added by $37.960 million.

Under this scenario, total output is expected to rise by $519.148 million. Corresponding to this are anticipated increases in employment of 1,076 jobs, $86.821 million wages and salaries, and $166.629 million in terms of value-added.

The total estimated changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.687</td>
</tr>
<tr>
<td>Employment</td>
<td>2.562</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.060</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.095</td>
</tr>
</tbody>
</table>

The output multiplier of 1.687 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.69 once all flow-on industrial and consumption effects are taken into consideration.

The employment multiplier of 2.562 indicates that for every 10 direct jobs generated under this scenario, it is estimated that 16 further jobs would be created in the broader Great Ocean Road once all flow-on industrial and consumption effects are taken into consideration.

**LAKE CONDAH/ BUDJ BIM NATIONAL HERITAGE LANDSCAPE**

**CONSTRUCTION PHASE ANALYSIS**

$50 million over four years. Assumptions: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

**OPERATIONAL PHASE**

25 jobs in accommodation and art & recreation services.

Under this scenario Gross Region Product is estimated to increase by $3.552 million (0.02 %) to $17,017.526 million. Contributing to this is a direct increase in output of $4.361 million, 25 additional direct jobs in accommodation arts & recreation services, $1.040 million more in wages and salaries and a boost in value-added of $1.811 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $2.072 million, 8 more jobs, $0.539 million more paid in wages and salaries, and a gain of $0.884 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.475</td>
</tr>
<tr>
<td>Employment</td>
<td>1.320</td>
</tr>
</tbody>
</table>
The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $1.651 million, employment by 7 jobs, wages and salaries by $0.381 million, and value-added by $0.857 million.

Under this scenario, total output is expected to rise by $8.085 million. Corresponding to this are anticipated increases in employment of 40 jobs, $1.960 million wages and salaries, and $3.552 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.854</td>
</tr>
<tr>
<td>Employment</td>
<td>1.600</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.885</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.962</td>
</tr>
</tbody>
</table>

The output multiplier of 1.845 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $0.85 once all flow-on industrial and consumption effects are taken into consideration.

**GREAT OCEAN ROAD UPGRADE**

**CONSTRUCTION PHASE**

$50 million over 12 months. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. Industry Sector: Heavy & Civil Engineering Construction

Under this scenario Gross Region Product is estimated to increase by $40.156 million (0.24 %) to $17,054.130 million. Contributing to this is a direct increase in output of $50.000 million, 60 additional jobs, $8.126 million more in wages and salaries and a boost in value-added of $12.070 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $45.024 million, 152 more jobs, $10.432 million more paid in wages and salaries, and a gain of $18.013 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.900</td>
</tr>
</tbody>
</table>
The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $19.409 million, employment by 81 jobs, wages and salaries by $4.482 million, and value-added by $10.073 million.

Under this scenario, total output is expected to rise by $114.432 million. Corresponding to this are anticipated increases in employment of 293 jobs, $23.040 million wages and salaries, and $40.156 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.289</td>
</tr>
<tr>
<td>Employment</td>
<td>4.883</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.835</td>
</tr>
</tbody>
</table>

All construction phase economic benefits are short-term and limited to the period of construction.

GREAT OCEAN ROAD WILDERNESS LODGE, MOONLIGHT HEAD

CONSTRUCTION PHASE

$20 million over two years. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $16.510 million (0.10 %) to $17,030.484 million. Contributing to this is a direct increase in output of $20.000 million, 3 additional jobs in year 1 increasing to 54 jobs in year 2, $2.758 million more in wages and salaries, and a boost in value-added of $6.127 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $16.741 million, up to 54 more jobs in year 2, $3.900 million more paid in wages and salaries, and a gain of $6.769 million in terms of value-added.
<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.500</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.000</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

Under this scenario, total output is estimated to rise by $43.705 million. Corresponding to this are anticipated increases in employment of 135 jobs (year 2), $8.266 million wages and salaries, and $16.510 million in terms of value-added.

The total estimated changes to economic activity represent the following Type 2 economic multipliers:

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.19 once all flow-on industrial and consumption effects are taken into consideration.

All construction phase economic benefits are short-term and limited to the period of construction.

**OPERATIONAL PHASE**

Persons employed at full capacity: 30

Industry Sector: DIVISION H: - Accommodation & Food Services

*The Accommodation and Food Services Division includes units mainly engaged in providing short-term accommodation for visitors. Also included are units mainly engaged in providing food and beverage services, such as the preparation and serving of meals and the serving of alcoholic beverages for consumption by customers, both on and off-site. Source: Australian Bureau of Statistics*

Under this scenario Gross Region Product is estimated to increase by $3.171 million (0.02 %) to $17,017.145 million. Contributing to this is a direct increase in output of $3.875 million, 30 additional direct jobs in accommodation & food services, $0.947 million more in wages and salaries and a boost in value-added of $1.630 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect
impacts would result in a further increase to output valued at $1.906 million, 7 more jobs, $0.448 million more paid in wages and salaries, and a gain of $0.784 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.492</td>
</tr>
<tr>
<td>Employment</td>
<td>1.233</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.473</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.481</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $1.459 million, employment by 6 jobs, wages and salaries by $0.337 million, and value-added by $0.757 million.

Under this scenario, total output is expected to rise by $7.239 million. Corresponding to this are anticipated increases in employment of 43 jobs, $1.732 million wages and salaries, and $3.171 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.868</td>
</tr>
<tr>
<td>Employment</td>
<td>1.433</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.828</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.945</td>
</tr>
</tbody>
</table>

The output multiplier of 1.868 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $0.87 once all flow-on industrial and consumption effects are taken into consideration.

GREAT OCEAN ROAD INTEGRATED RESORT, PORT CAMPBELL AREA

CONSTRUCTION PHASE

$35 million over three years. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $28.892 million (0.17 %) to $17,042.866 million. Contributing to this is a direct increase in output of $35,000 million, 8 jobs year 1, 57 additional jobs year 2, 34 jobs year 3, $4,827 million more in wages and salaries and a boost in value-added of $10.722 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $29.297 million, 8 jobs
year 1, 57 additional jobs year 2, 34 jobs year 3, $6.825 million more paid in wages and salaries, and a gain of $11.845 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.000</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $12.186 million, employment by 5 jobs in year 1, 29 in year 2, 17 jobs in year 3, wages and salaries by $2.814 million, and value-added by $6.325 million.

Under this scenario, total output is expected to rise by $76.483 million. Corresponding to this are anticipated increases in employment of 249 jobs, $14.465 million wages and salaries, and $28.892 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.500</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $2.19 once all flow-on industrial and consumption effects are taken into consideration.

All construction phase economic benefits are short-term and limited to the period of construction.

GREAT OCEAN WALK

CONSTRUCTION PHASE

$10 million over two years. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $8.255 million (0.05 %) to $17,022.229 million. Contributing to this is a direct increase in output of $10.000 million, 1 additional direct construction sector jobs in year 1 increasing to 27
jobs in year 2, $1.379 million more in wages and salaries and a boost in value-added of $3.064 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $8.371 million, 1 more job in year 1 and 27 jobs in year 2, $1.950 million more paid in wages and salaries, and a gain of $3.384 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.000</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $3.482 million, employment by 2 jobs in year 1 increasing to 13 jobs in year 2, wages and salaries by $0.804 million, and value-added by $1.807 million.

Under this scenario, total output is expected to rise by $21.852 million. Corresponding to this are anticipated increases in employment of 4 jobs in year 1 and 67 jobs in year 2, $4.133 million wages and salaries, and $8.255 million in terms of value-added.

The total estimated changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.500</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.19 once all flow-on industrial and consumption effects are taken into consideration.

All construction phase economic benefits are short-term and limited to the period of construction.

GEELONG EXHIBITION AND EVENTS CENTRE

CONSTRUCTION PHASE ANALYSIS

$200 million over four years. Local construction component is estimated at $170 million. Assumption: All the expenditure is on construction; contracts awarded to firms based in the Great Ocean Road region. If a large component of the
investment is on imported capital equipment the benefits to the local economy would need to be revised.

Under this scenario Gross Region Product is estimated to increase by $140.333 million (0.82 %) to $17,154.307 million. Contributing to this is a direct increase in output of $170.000 million, 28 additional direct jobs in year 1_141 jobs year 2_283 jobs year 3_113 jobs year 4, $23.443 million more in wages and salaries and a boost in value-added of $52.080 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $142.301 million, 28 more jobs in year 1_141 jobs year 2_283 jobs year 3_113 jobs year 4, $33.150 million more paid in wages and salaries, and a gain of $57.533 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.837</td>
</tr>
<tr>
<td>Employment</td>
<td>2.000</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.414</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.105</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy.

The consumption effects under the scenario are expected to further boost output by $59.188 million, employment by 15 jobs in year 1_73 jobs year 2_145 jobs year 3_58 jobs year 4, wages and salaries by $13.667 million, and value-added by $30.719 million.

Under this scenario, total output is expected to rise by $371.489 million. Corresponding to this are anticipated increases in employment of 71 jobs in year 1_355 jobs year 2_710 jobs year 3_284 jobs year 4, $70.260 million wages and salaries, and $140.333 million in terms of value-added.

The total changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>2.185</td>
</tr>
<tr>
<td>Employment</td>
<td>2.511</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>2.997</td>
</tr>
<tr>
<td>Value-added</td>
<td>2.695</td>
</tr>
</tbody>
</table>

The output multiplier of 2.185 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $1.19 once all flow-on industrial and consumption effects are taken into consideration.
All construction phase economic benefits are short-term and limited to the period of construction.

**OPERATIONAL PHASE**

Persons employed at capacity: 164  
Industry Sector: Heritage, creative and performing arts... includes '9003 Performing Art Venue Operation'

Under this scenario Gross Region Product is estimated to increase by $23.222 million (0.14 %) to $17,037.196 million. Contributing to this is a direct increase in output of $25.002 million, 164 additional direct jobs in the heritage creative and performing arts sector, $6.650 million more in wages and salaries and a boost in value-added of $11.724 million.

From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are anticipated, and it is estimated that these indirect impacts would result in a further increase to output valued at $13.475 million, 53 more jobs, $3.643 million more paid in wages and salaries, and a gain of $5.911 million in terms of value-added.

These industrial effects represent the following Type 1 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 1 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.539</td>
</tr>
<tr>
<td>Employment</td>
<td>1.323</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.548</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.504</td>
</tr>
</tbody>
</table>

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under the scenario are expected to further boost output by $10.765 million, employment by 45 jobs, wages and salaries by $2.486 million, and value-added by $5.587 million.

Under this scenario, total output is expected to rise by $49.242 million. Corresponding to this are anticipated increases in employment of 262 jobs, $12.779 million wages and salaries, and $23.222 million in terms of value-added.

The total estimated changes to economic activity represent the following Type 2 economic multipliers:

<table>
<thead>
<tr>
<th>Impact</th>
<th>Type 2 Multipliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.970</td>
</tr>
<tr>
<td>Employment</td>
<td>1.598</td>
</tr>
<tr>
<td>Wages and Salaries</td>
<td>1.922</td>
</tr>
<tr>
<td>Value-added</td>
<td>1.981</td>
</tr>
</tbody>
</table>

The output multiplier of 1.970 indicates that for each dollar of direct output generated under this scenario, the broader Great Ocean Road economy is estimated to benefit by a further $0.97 once all flow-on industrial and consumption effects are taken into consideration.
## APPENDIX H

### COSTS FOR GREAT OCEAN ROAD

#### IMPROVEMENTS TO ONGOING MAINTENANCE

The following is for the road between Spout Creek at Eastern View (129.9km) and Gambier Street, Apollo Bay (187.3km) requiring higher value surfacings (e.g. asphalt) to enhance the road user experience. Excessive lengths of road require ongoing routine maintenance due to later life.

<table>
<thead>
<tr>
<th>Program Category</th>
<th>Total Length</th>
<th>KM</th>
<th>% Annual Coverage</th>
<th>Area Treated Annually</th>
<th>m²</th>
<th>Predicted Treatment Life</th>
<th>Annual Cost (2011-12 $000's)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routine Pavement Maintenance</td>
<td>57.24</td>
<td>100</td>
<td>Ongoing</td>
<td>$350</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Periodic Asphalt Resurfacing</td>
<td>50</td>
<td>5</td>
<td>22500</td>
<td>20</td>
<td>$960</td>
<td></td>
<td></td>
<td>High routine maintenance costs due to: curves, alignment and tree limited access with limited access.</td>
</tr>
<tr>
<td>Periodic Re-sealing</td>
<td>7.36</td>
<td>8</td>
<td>4650</td>
<td>12</td>
<td>$100</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pavement Rehabilitation / Reconstruction</td>
<td>57.24</td>
<td>100</td>
<td>Ongoing</td>
<td>$145</td>
<td></td>
<td></td>
<td></td>
<td>Extensive lengths of road maintain constant high maintenance due to: curves, alignment and tree limited access.</td>
</tr>
<tr>
<td>Roadside Residual Maintenance</td>
<td>57.24</td>
<td>100</td>
<td>Ongoing</td>
<td>$60</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roadside Periodic (minor roadside work)</td>
<td>8</td>
<td>Ongoing</td>
<td>$100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roadside Rehab (landslide regions)</td>
<td>Ongoing</td>
<td>$300</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drainage replacement of pits &amp; pipes</td>
<td>Ongoing</td>
<td>$20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL:** $3,370

The following is for the balance of the route (Length: 183km) requiring routine maintenance with minor areas of asphalt surfacing. Lesser areas of significant roadside maintenance would also be expected.

<table>
<thead>
<tr>
<th>Program Category</th>
<th>Total Length</th>
<th>KM</th>
<th>% Annual Coverage</th>
<th>Area Treated Annually</th>
<th>m²</th>
<th>Predicted Treatment Life</th>
<th>Annual Cost (2011-12 $000's)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routine Pavement Maintenance</td>
<td>182.8</td>
<td>100</td>
<td>Ongoing</td>
<td>$1,040</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Periodic Asphalt Resurfacing</td>
<td>5</td>
<td>5</td>
<td>2200</td>
<td>20</td>
<td>$150</td>
<td></td>
<td></td>
<td>High routine maintenance costs due to: curves, alignment and tree limited access with limited access.</td>
</tr>
<tr>
<td>Periodic Resealing</td>
<td>177.8</td>
<td>8</td>
<td>125000</td>
<td>12</td>
<td>$1,450</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pavement Rehabilitation / Reconstruction</td>
<td>182.8</td>
<td>2.5</td>
<td>406000</td>
<td>40</td>
<td>$2,250</td>
<td></td>
<td></td>
<td>Extensive lengths of road maintain constant high maintenance due to: curves, alignment and tree limited access.</td>
</tr>
<tr>
<td>Roadside Residual Maintenance</td>
<td>182.8</td>
<td>100</td>
<td>Ongoing</td>
<td>$210</td>
<td></td>
<td></td>
<td></td>
<td>High routine maintenance costs due to: curves, alignment and tree limited access with limited access.</td>
</tr>
<tr>
<td>Roadside Periodic (minor roadside work)</td>
<td>Ongoing</td>
<td>$100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roadside Rehab (landslide regions)</td>
<td>Ongoing</td>
<td>$160</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drainage replacement of pits &amp; pipes</td>
<td>Ongoing</td>
<td>$20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL:** $5,420

**TOTAL:** $8,790

Note: Current average maintenance allocation for the Great Ocean Road as a proportion of the Regional Maintenance allocation is $2.45 million.